The Moving and Storage Industry in the U.S. Economy

Facilitating Economic Growth by Making Residential Mobility Easier, Creating Opportunities for Small Businesses, and Stimulating Other Industries throughout the Economy

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Executive Summary

In a mobile economy, the moving and storage industry plays an important role by providing transportation and warehousing services for the household goods of people who are moving to new jobs and homes. In the United States, the average person starts 10.5 jobs between the ages of 18 and 40 and makes nearly twice as many residential moves as the average person in Great Britain and Japan. It's been said that migration makes economic growth possible. If that is the case, the moving and storage industry promotes growth by facilitating migration.

The moving and storage industry is an efficient network of national moving companies (van lines); local agents (generally, full-service moving and storage companies operating in local geographic markets in affiliation with van lines); regional and local independent full-service moving and storage companies engaged in intra- or inter-state transportation without van line affiliations; and independent contractors who own or operate trucks, tractors, and trailers. The industry is five times larger than the motorcoach industry and roughly the same size as the industry of computer retail stores. It consists of 8,100 companies that altogether do $16.5 billion of business annually at 17,000 locations providing 122,600 jobs.

While the industry's primary focus is on summertime transportation of household goods, its year-round activities are extraordinarily diverse. In addition to specializing in "high-touch" service for transportation of fragile items, it provides specialized freight transportation and warehousing services for office and industrial equipment and general freight, some of which requires special handling, such as trade show exhibits and equipment, computers, and medical equipment. For corporate clients, van lines sometimes serve as relocation managers and engage in real estate transactions on behalf of their clients, buying and selling the homes of relocated employees. Transportation and warehousing of office and industrial equipment and general freight has accounted for as much as half of all van line shipments and one-fourth of revenue during the recent past.

Business lines that are individually too small to be identified in publicly available industry statistics collectively account for as much as 15% of industry revenue. Such business lines include services such as crate manufacturing, document storage and destruction, cleaning services, and even piano tuning, among others.

Significant lines of business identified in publicly available statistics on industry revenue include long-distance motor carrier service (43% of industry operating revenue), local motor carrier service (27%), contract or private warehousing and storage (10%), and packing and packaging services related to motor carrier and storage activities (7%). Other identified business lines, each of which accounts for less than 1% of industry revenue, include process, physical distribution, and logistics consulting; physical processing and transforming of goods (assembly and disassembly) related to motor carrier and storage activities; order assembly services; courier and messenger services (including parcel delivery); sales of merchandise; repair and maintenance services (including parts installed); and collection of garbage and trash (excluding hazardous waste).

Although van lines are the most visible dimension of the industry, 96% of establishments are small local businesses that earn less than $10 million annually and account for 72% of industry jobs. Moreover, 84% of establishments are micro-businesses that earn less than $1 million annually and account for 31% of industry jobs. Small businesses such as these make major contributions to the U.S. economy. They generate half of non-farm output, add as much as 80% of net new private sector jobs annually, stimulate the poorest regions of the economy, and, because many are businesses conducted out of a home, they help absorb the shock of a general economic decline. Moving and storage industry companies can rely on services provided by independent contractors as needed, thereby avoiding the need to lay off employees during periods of off-peak demand.

The total impact of the industry on the U.S. economy is much greater than the jobs and incomes in the industry itself. In the U.S. economy, $8.9 billion in household earnings, 353,000 jobs, $1.2 billion in income tax revenue (including federal and state personal income taxes and federal business income taxes), and $191 million in Federal Highway Trust Fund revenue can be attributed to the demand for services provided by the industry. The economies of every state are stimulated, especially California where more than 40,000 jobs, $1 billion in household earnings, and $96 million in tax revenue can be attributed directly and indirectly to the industry.

Other industries are stimulated as well, especially in the manufacturing sector and the real estate and rental and leasing sector. The output of the manufacturing sector increases $0.38 for every $1.00 increase in demand for moving and storage industry services. Manufacturing of motor vehicles, bodies and trailers, and parts is stimulated most. The output of the real estate and rental and leasing sector increases $0.22 for every $1.00 increase in demand for moving and storage industry services. Lessors of mini-warehouses and self-storage units are stimulated most.

But the impact of the industry, like the industry itself, is cyclical. When times are good, people move in search of better jobs and new homes. Industry activity increases. When times are bad, industry activity stagnates or declines.

Since 2005, the number of people moving each year has declined. In 2007, there were 22% fewer long-distance moves than in 2005. Not surprisingly, van line shipments and revenues have steadily declined. Given the current condition of housing markets and the overall economy, the industry is bracing for a long and slow recovery.

Nevertheless, the industry continues to offer opportunities for small business development and growth. As in the past, the industry will adjust to the current economic decline by relying more heavily on independent contractors. Jobs for independent contractors have risen as much as 20% since 2001.

The moving and storage industry is resilient. By continuing to offer diverse services through an efficient network, the industry will continue to thrive. By providing transportation, warehousing, and other services, the industry will continue to

- Make it easier for people to move in search of new jobs or homes and thereby promote economic growth,
- Be a source of economic opportunity for small business development and growth, as well as a source of jobs and incomes throughout the United States,
- Stimulate the economies of every state,
- Stimulate other industries, and
- Generate federal and state tax revenues from the incomes generated directly and indirectly by the industry.

1. Introduction

"Migration is the factor which makes economic growth possible." —Nigel Harris, Ph.D., Social and Human Sciences Newsletter 2005, United Nations Educational, Scientific and Cultural Organization

The U.S. economy relative to other industrialized economies is characterized by greater openness to international investment and trade, flexible labor markets, low costs of starting a business, and an environment that fosters innovation. These characteristics combine to help explain why average annual productivity growth has risen steadily since 1990.[1] No other major industrialized economy has achieved such success.

Openness, flexibility, a light regulatory touch, and a propensity to innovate lead to change, and economic change is pervasive in the U.S. economy. In 2000 there were approximately 6.3 million business establishments[2] in the U.S. economy. Since then, approximately 749,000 new establishments have opened annually and 688,000 have closed. New establishments created 6.2 million jobs in 2004. Closings eliminated 5.9 million jobs. Business contractions and expansions also created and eliminated jobs.

While there are numerous reasons for moving, work-related reasons explain most inter-county moves and housing-related reasons explain most intra-county moves. (Figure 1 and Table 1).

We see the effects of change in statistics on job and residential mobility. In the U.S. economy, the average person starts 10.5 jobs between the ages of 18 and 40.[3] Over one's lifetime, the average American makes nearly twice as many residential moves as the average person in Great Britain or Japan.[4] Including those who moved overseas, nearly 40 million people (14% of the population) moved during the year ending March 2006.

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[1] *Economic Report of the President, February 2007*, United States Government Printing Office, Washington, DC, pp. 58-61.

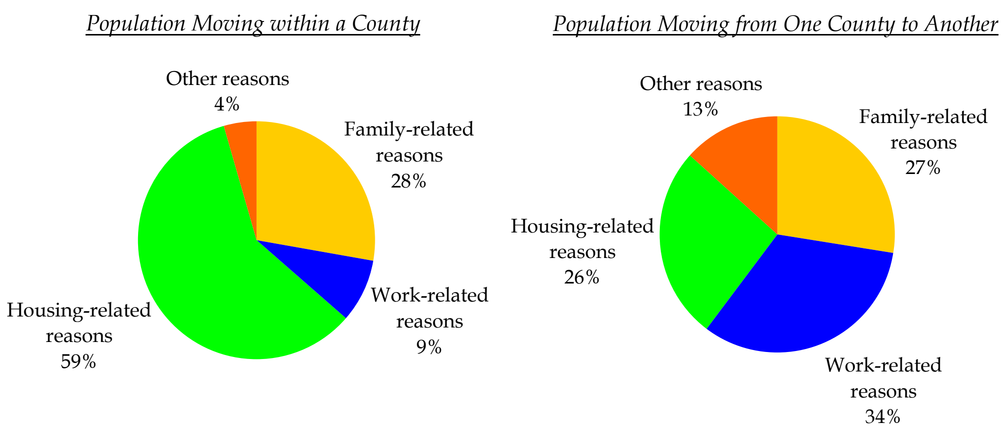
[2] A business establishment is a single physical location at which business is conducted. A company, business firm, or enterprise might consist of multiple business establishments. See "Establishment and Employment Changes from Births, Deaths, Expansions, and Contractions by Employment Size of the Enterprise for the United States and All States," 1989-2004 Business Information Tracking Series, Census Bureau, Company Statistics Division at http://www.census.gov/csd/susb/susbdyn.htm.

[3] U.S. Bureau of Labor Statistics, National Longitudinal Survey of Youth 1979 (NLSY79).

[4] Michael J. Greenwood, "Chapter 12 Internal Migration in Developed Countries," *Handbook of Population and Family Economics,* M.R. Rosenzweig and O. Stark (eds.), Elsevier Science B.B., 1997.

Figure 1

Most Migration Occurs Because of Work- and Housing-Related Reasons



SOURCE: Nathan Associates Inc. See Table 1 for details.

Table 1

Intra- and Inter-county Moves by Specific Reason for the Year Ending March 2006

Reason for Moving	People Who Moved (thousands)		
	Total	Intracounty	Intercounty
Family-related reasons	**10,653**	**6,894**	**3,759**
Change in marital status	2,333	1,547	786
To establish own household	3,370	2,617	753
Other family reason	4,950	2,730	2,220
Work-related reasons	**6,652**	**2,160**	**4,492**
New job/job transfer	3,179	538	2,641
To look for work/lost job	472	153	319
Closer to work/easier commute	1,438	737	701
Retired	168	9	159
Other job-related reason	1,395	723	672
Housing-related reasons	**18,300**	**14,694**	**3,606**
Wanted to own home/not rent	3,409	2,626	783
New/better house/apartment	7,073	6,065	1,008
Better neighborhood/less crime	1,746	1,153	593
Cheaper housing	2,426	1,889	537
Other housing reason	3,646	2,961	685
Other reasons	**2,937**	**1,103**	**1,834**
Attend/leave college	964	313	651
Change of climate	170	25	145
Health reasons	494	240	254
Natural disaster	669	160	509
Other reason	640	365	275
Total movers	**38,541**	**24,851**	**13,690**

Note: U.S. population totaled 289.8 million.

SOURCE: Current Population Survey 2005-2006. Table 33-1 and 33-2.

In a mobile economy, the moving and storage industry plays an important role by providing transportation and warehousing services for used household goods. But the industry does much more. It also provides specialized freight transportation of fragile office equipment such as computers; transportation of trade show displays; storage, retrieval, and disposal of office documents; and, on occasion, real estate transactions for corporate customers with employee relocation programs.

This report presents an analysis of the industry, including its history, current industrial organization, characteristics, and impacts on the U.S. economy. Section 2 describes the organization of the industry and its characteristics. Section 3 presents the impact of the industry on the U.S. and state economies. Impacts include jobs, wages, and tax revenues attributable directly and indirectly to the industry's provision of its moving and storage services. Section 4 presents an analysis of industry trends. Conclusions are presented in the final section.

All industry statistics are presented in appendices. Appendix A presents industry characteristics by industry segment and year for 1998 through 2005. Appendix B presents industry characteristics by size of firms in the industry, where size is measured by number of employees. Appendix C presents data on product and service lines that generate revenue for the industry. Appendix D presents industry characteristics by state. Appendix E presents direct and indirect impacts of the industry on the U.S and state economies.

2. Industry Structure and Characteristics

When families moved from one state to another in the latter half of the 19th century, transportation of their household goods was a multi-modal affair. At the origin of the move, a local businessman would load the household goods onto a horse-drawn cart, haul them to a warehouse where they would be crated, and then haul them again by cart to a train depot where they would be loaded onto a rail car for the long-distance haul.[5] At the destination, another local businessman would unload, uncrate, and deliver the goods.

According to the American Moving and Storage Association (AMSA), the industry travels 1.2 billion interstate miles each year. On the basis of a 3,000-mile cross-country trip, the moving and storage industry makes 390,000 cross-country trips each year.

The moving and storage industry as we know it today began in the 1920s when motorized trucks replaced horse-drawn carts, and, eventually, the railroad. The multi-modal system became simpler and more efficient. Local and interstate shipping required only a single mode of transportation—the motorized truck. The need to transship goods from one mode to another was eliminated.

A Network of National and Local Businesses Working Together for Increased Efficiencies

Today, the moving and storage industry is an efficient network of national moving companies, local agents, independent moving companies, and independent contractors who own or operate trucks, tractors, and trailers.

[5] Stanley "G" Alexander, *History of the Moving & Storage Industry in the United States,* A-1 Printing & Sales Company, Garden Grove, CA, 1970, p 2.

- National moving companies—van lines—handle dispatching, shipment routing and monitoring, paperwork processing, and claims settlements, primarily for interstate and international shipments.
- Van lines rely on local agents, many of whom use the van line's shipping authority to transport shipments across state lines. Generally, agents are full-service moving and storage companies operating in the geographic markets in which they are located. Agents can be moving and storage companies owned by van lines but, more often, they are independently owned and operated companies affiliated with a van line. Booking agents sell and register moves. They need not be located at or near the origin or destination of the shipment. Agents located at the origin of the shipment are responsible for packing and packaging activities and preparing the necessary documentation. Agents located at or near the destination of the shipment provide storage, unpacking, and all other services required at the destination.
- Like agents, independent moving companies are regional or local full-service moving and storage companies; unlike agents, they operate without any van line affiliation and have their own authority to transport shipments across state lines.
- On occasion, van lines, agents and independent moving companies rely on independent contractors who own or operate (drivers) trucks, tractors, and trailers to haul the goods being shipped.

8,100 Companies Altogether Doing $16.5 Billion of Business Annually at 17,000 Locations

The moving and storage industry is five times larger than the motorcoach industry and roughly the same size as the industry of computer retail stores.

This network, which is part of the transportation and warehousing sector of the U.S. economy, consists of businesses that primarily provide local or long-distance truck transportation of specialized freight, as well as warehousing and storage services.[6, 7] Approximately 8% of truck transportation industry revenue is revenue of the moving and storage industry (Figure 2).

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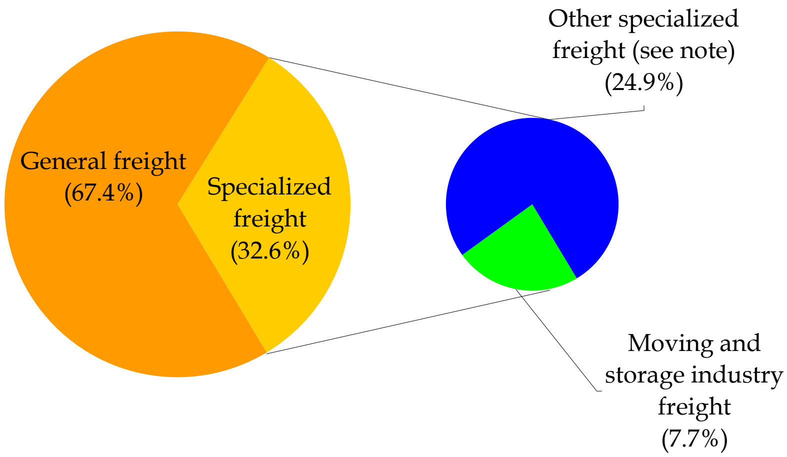
[6] In the North American Industrial Classification System (NAICS), the codes that identify these segments are 4842101: establishments primarily engaged in furnishing trucking or transfer of used household, institutional, and commercial furniture and equipment without storage, within a city, town, or other local area, including adjoining towns and suburban areas; 4842102: establishments primarily engaged in furnishing trucking of used household, institutional, and commercial furniture and equipment generally beyond a single metropolitan area or adjacent metropolitan areas; 4842103: establishments primarily engaged in furnishing trucking and storage of furniture and other household goods within a city, town, or other local area, including adjoining towns and suburban areas; and 4931901: establishments primarily engaged in revenue-generating warehousing and storage of household goods.

[7] This study does not include businesses engaged primarily in leasing mini-warehouses and self storage units. They are classified by NAICS code 53113 and are assigned to the real estate and rental and leasing sector of the U.S. economy.

Figure 2

The Moving and Storage Industry Accounts for Nearly 8% of the Total Revenue of the Truck Transportation Industry (% of truck transportation industry revenue)



Note: Other specialized freight includes hazardous materials, agricultural products, and dump trucking. It does not include specialized freight of the moving and storage industry.
SOURCE: Truck Transportation: 2002, Economic Census, Transportation and Warehousing, Industry Series, U.S. Census Bureau, U.S. Department of Commerce, Table 1.

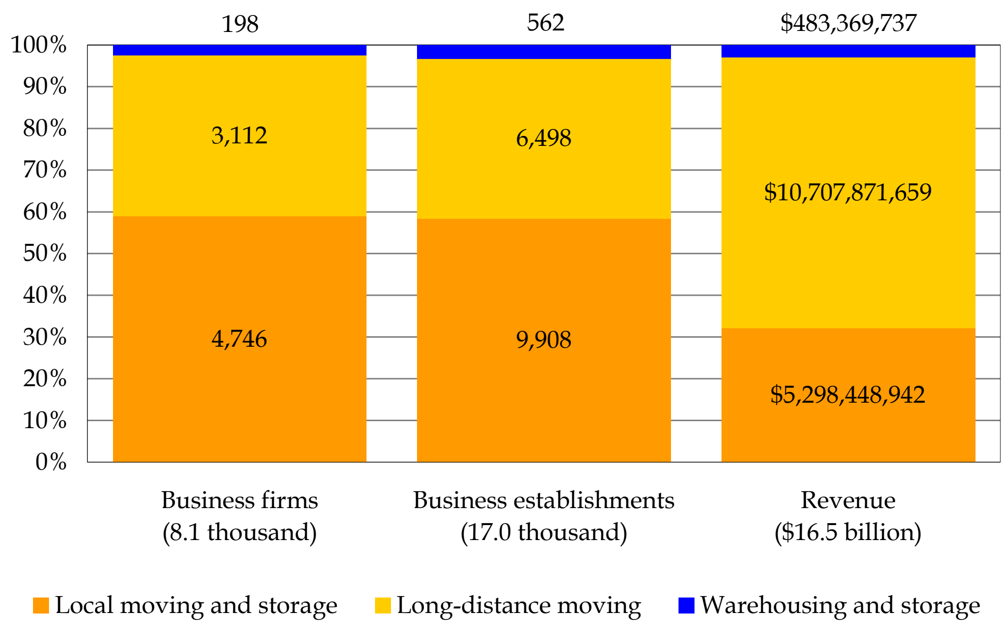
The moving and storage industry consists of approximately 8,100 companies[8] altogether doing $16.5 billion of business annually at 17,000 locations (business establishments[9]). Although the segment of the industry that primarily provides local moving and storage services accounts for most industry businesses, most industry revenue is generated by the segment that primarily provides long-distance moving and storage services (Figure 3).

Providing Moving and Storage Services to Corporations, Military Families, Civilian Government Employees, and Private Households

In 2007, private households (or cash on delivery—COD—customers in the lexicon of AMSA) were the largest customer segment for van line shipments of household goods, followed by corporate clients, and the government (Figure 4).[10] The moving and storage industry serves military families, as well as civilian government employees, through contracts with the Department of Defense and the General Services Administration.

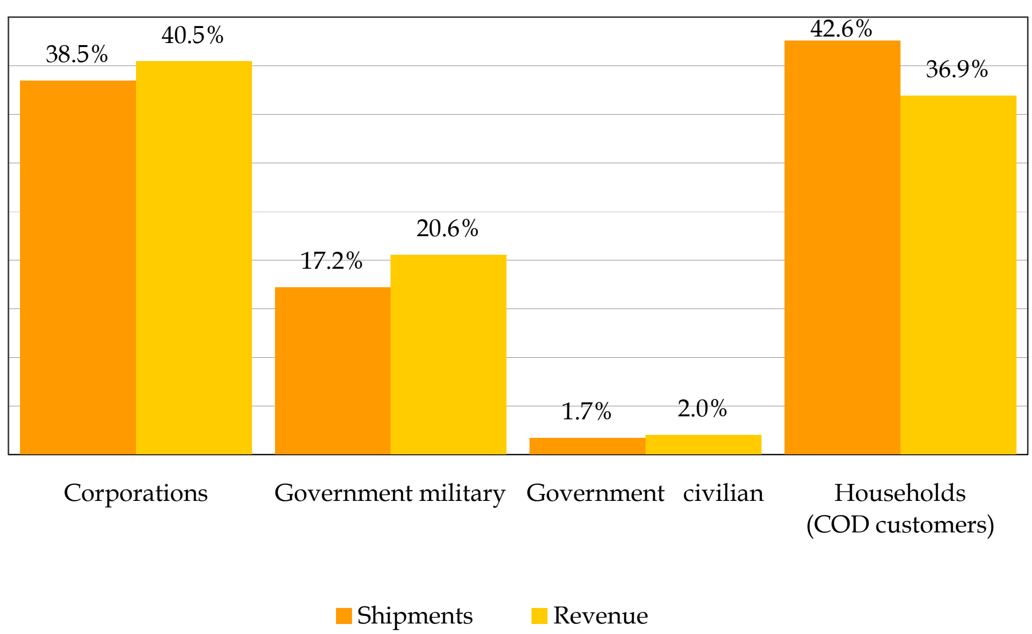
[8] Only companies with payroll, that is, employer businesses.
[9] Includes establishments of employer and non-employer businesses. Non-employer businesses have no payroll and employees. They are the independent contractors of the industry.
[10] Results are from data collected monthly by the American Moving and Storage Association (AMSA). Eleven van lines respond to the AMSA survey. For the past five years, the same 11 have responded. Their combined revenue is approximately 16% of industry revenue.

Figure 3
Most Companies and Their Locations of Operation Primarily Provide Local Moving and Storage Services, but Most Revenue Is Generated by Companies and Locations that Primarily Provide Long-Distance Moving and Storage Services



SOURCE: Nathan Associates Inc. See Appendix A, Tables A-2, A-3, and A-4.

Figure 4
The Household Customer Segment Accounts for Most Industry Volume, but the Corporate Customer Segment Accounts for Most Revenue (shipments and revenue in 2007)



SOURCE: American Moving and Storage Association, Monthly Market Study.

Corporate clients generate most van line revenue. For corporate clients with employee relocation programs, van lines might also earn revenue from engaging in real estate transactions such as buying and selling the homes of relocated employees, arranging for temporary housing, and providing related moving services.

Providing Much More than Transportation and Warehousing of Used Household Goods

Because most people move during the summer months, the moving and storage industry is seasonal. As such, it must offer a variety of services to sustain itself during off-peak periods.

In addition to its main line of business—household goods transportation and warehousing—the industry provides transportation and warehousing of office and industrial equipment, which might include storage, retrieval, and disposal of office documents; trade show exhibits and equipment; and other general freight, some of which requires special handling, such as computers and medical equipment. General freight might also include copiers, new store fixtures, HVAC equipment, new furniture, appliances, fitness equipment, motorcycles, sales kiosks, spas, hot tubs, and backyard garden pools.

The importance of these other service segments can be seen in data on van line shipments and revenue collected by AMSA.[11] Although transportation and warehousing of household goods is clearly the most important service segment, office and industrial equipment and general freight accounted for 36% of van line shipments and 16% of van line revenue in 2007 (Figure 5).

Industry wide, lines of business identified in statistics produced by the U.S. Department of Commerce include packing and packaging services; process, physical distribution, and logistics consulting; physical processing and transforming of goods; order assembly services; courier and messenger services (including parcel delivery); merchandise sales; repair and maintenance; garbage and trash collection; and others, as well as motor carrier service and warehousing and storage services.

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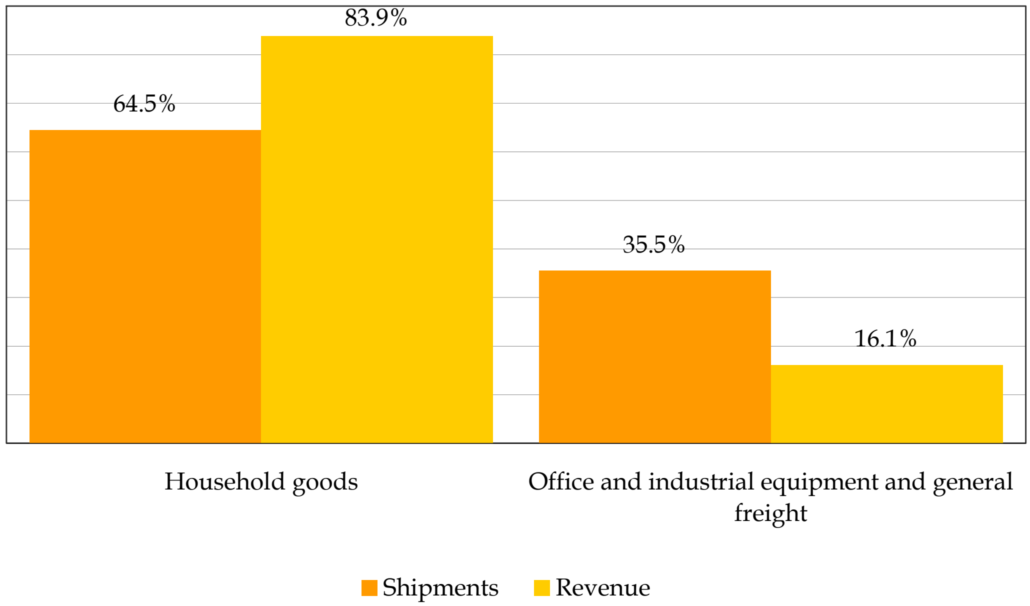
[11] *Ibid.*

Figure 5

Moving and Storage of Office and Industrial Equipment and General Freight Accounts for Just Over One-third of Van Line Volume and Nearly One-sixth of Revenue



SOURCE: American Moving and Storage Association, Monthly Market Study.

Establishments in each segment of the industry earn revenue from the provision of the major business line of the other two segments (Table 2). As reported by the Commerce Department, 42.5% of establishments that primarily provide local moving services earn revenue from long-distance motor carrier service and 31.2% earn revenue from warehousing and storage services. Likewise, 77.2% of establishments that primarily provide long-distance moving services earn revenue from local motor carrier service and 45.6% earn revenue from warehousing and storage services. And 37.3% of establishments that primarily provide warehousing and storage services also earn revenue from long-distance motor carrier service; 63.4% earn revenue from local motor carrier service.

Business lines that are too small to be identified individually in Commerce Department data are, collectively, the second leading source of revenue for the long-distance moving and storage segment of the industry (Figure 6). The collective importance of these numerous yet individually insignificant sources of revenue is not surprising in a seasonal industry that must survive off-peak periods of demand for its major service (household goods moving and storage) by offering numerous and diverse other services.

Table 2

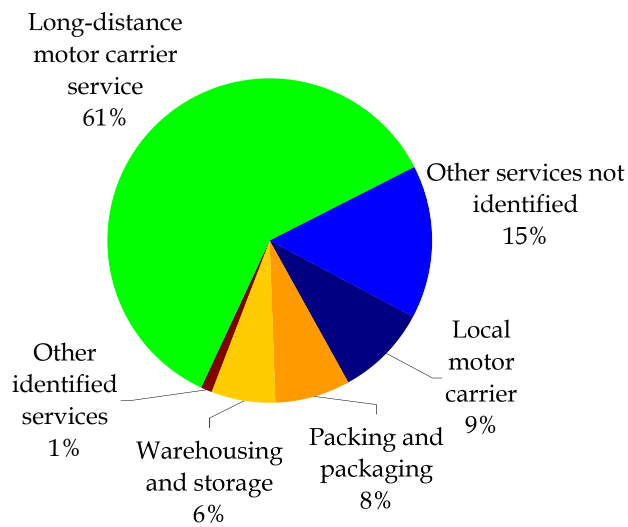
Establishments in Each Segment of the Industry Earn Revenue from the Provision of the Leading Business Line of the Other Two Segments, as Well as Numerous and Diverse Other Lines of Business (% of industry establishments earning revenue from business lines)

Business Line	Local Moving and Storage	Long-distance Moving and Storage	Warehousing and Storage
Motor carrier and storage related services			
Long-distance motor carrier service	42.5%	100.0%	37.3%
Local motor carrier service	100.0%	77.2%	63.4%
Packing/packaging services related to motor carrier and storage activities	40.9%	63.8%	62.1%
Contract/public warehousing and storage	31.2%	45.6%	100.0%
Process, physical distribution, and logistics consulting	1.8%	2.9%	5.6%
Physical processing/transforming of goods related to motor carrier and storage activities	2.5%	2.9%	7.5%
Order assembly services related to motor carrier and storage activities	2.4%	2.0%	8.7%
Courier and messenger services, including parcel delivery	1.9%	1.1%	0.0%
Other motor carrier and storage related services	19.3%	36.0%	57.1%
Sales of other merchandise	11.8%	7.6%	41.6%
Repair and maintenance, including parts installed	2.1%	2.9%	6.2%
Collection of garbage and trash, excluding hazardous waste	0.6%	0.0%	0.0%
All other sources of operating revenue	12.4%	27.2%	23.0%

SOURCE: "Product Lines: 2002," Table 1, 2002 Economic Census, Transportation and Warehousing, Subject Series, U.S. Census Bureau, Economics and Statistics Administration, U.S. Department of Commerce, October 2005.

Figure 6

Collectively, "Other Unidentified Services" Are the Second Leading Source of Revenue for Business Establishments that Primarily Provide Long-Distance Moving and Storage Services (% of revenue by service)



SOURCE: "Product Lines: 2002," Table 1, 2002 Economic Census, Transportation and Warehousing, Subject Series, U.S. Census Bureau, Economics and Statistics Administration, U.S. Department of Commerce, October 2005.

An Industry of Mostly Small and Micro-Businesses

In the moving and storage industry, where a small business is defined by an annual receipts cap of $23.5 million,[12] at least 98% of companies and 90% of establishments (locations where industry business is conducted) are small businesses.[13] They account for at least 70% of industry employment. When we include independent contractors, at least 96% of the industry's establishments are small businesses and they account for at least 72% of industry jobs (Figure 7).

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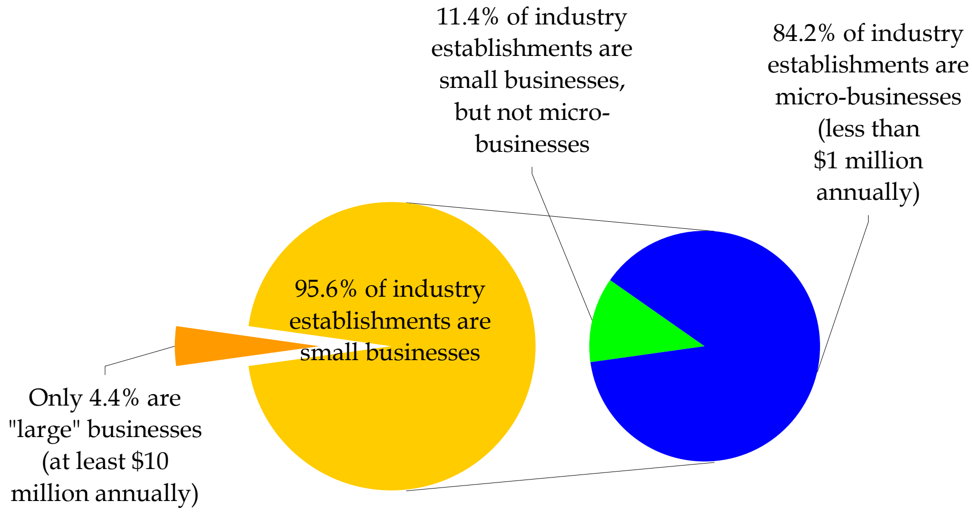
12 Effective March 11, 2008. See http://www.sba.gov/size.

13 Although we cannot identify from Census Bureau data the precise number that qualify as small businesses with revenue not exceeding $23.5 million annually, we do know and present here the number of businesses with annual revenue less than $10 million, a significantly smaller threshold than the official standard of $23.5 million.

Figure 7
The Moving and Storage Industry Is an Incubator of Small Businesses



SOURCES: "Establishment and Firm Size: 2002," 2002 Economic Census, Transportation and Warehousing, Subject Series, U.S. Census Bureau, November 2005 and U.S. Census Bureau's Nonemployer Statistics.

The industry, in fact, consists predominantly of micro-businesses, a category defined by annual revenue not exceeding $1 million.[14] Micro-businesses in the moving and storage industry account for 74% of firms and 65% of establishments. Including independent contractors, 84% of establishments are micro-businesses and that account for nearly one-third of industry jobs.

Small businesses make major contributions to the U.S. economy. They fuel economic growth, drive innovation, keep the economy agile, and provide social cohesion. According to a recent study, small businesses[15]

- Generate half the non-farm output of the U.S. economy
- Add 60% to 80% of net new private sector jobs annually
- Produce 13 to14 times as many patents as large businesses do
- Help absorb the economic shock of a declining economy—53% of all small businesses are home-based
- Generate entrepreneurial opportunities for minorities and women-owned businesses
  - The 4.1 million minority-owned small businesses generate $695 billion annually and employ 4.8 million workers

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[14] Derik Leebaert, "Entrepreneurship and Small Business," *eJournal USA: Economic Perspectives*, U.S. Department of State, January 2006, Vol. 11, No. 1, p 4.
[15] Leebaert.

— Women-owned small businesses generate nearly $1 trillion in revenues annually and employ more than 7 million people

- Inject economic activity into areas that need it most—800,000 companies (90% of the smallest of small businesses) are found in the poorest areas of the 100 largest U.S. cities.

The independent contractors or micro-businesses of the moving and storage industry provide services as needed, keeping the industry flexible and agile during boom and bust periods of the business cycle.

Providing 122,600 Jobs

Despite being composed primarily of small businesses, the moving and storage industry provided 122,600 jobs in 2005—114,600 jobs at businesses with payroll (employer businesses)[16] and 8,000 in non-payroll businesses (independent contractors who own or operate trucks, tractors, and trailers).[17]

The number of jobs in the industry is 1.5 times greater than the number of jobs in auto manufacturing and 5.6 times greater than in scheduled air freight transportation (Figure 8).

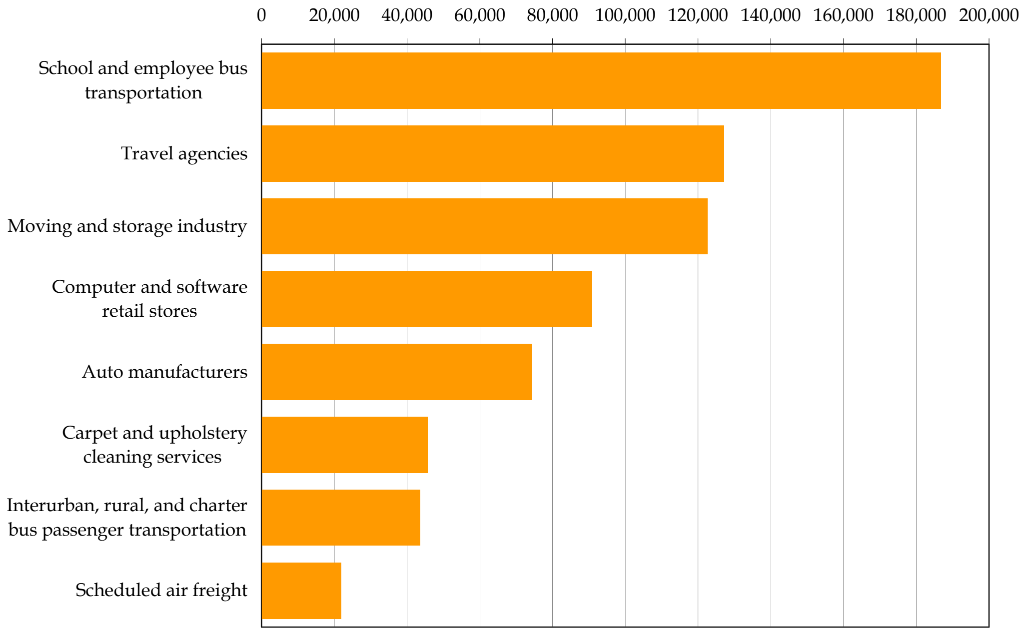
The number of jobs in the moving and storage industry is comparable to jobs in the industry of travel agencies.

In the moving and storage industry, 98% of all companies with payroll employ fewer than 100 people. A closer look reveals that nearly 40% of all companies with payroll employ fewer than five people (Figure 9). When independent contractors are included, there are fewer than five jobs at nearly 70% of industry establishments (Figure 10).

[16] Includes all part- and full-time employees on the payroll for the pay period including March 12.
[17] Jobs at non-employer businesses are measured by the number of non-employer business establishments.

Figure 8

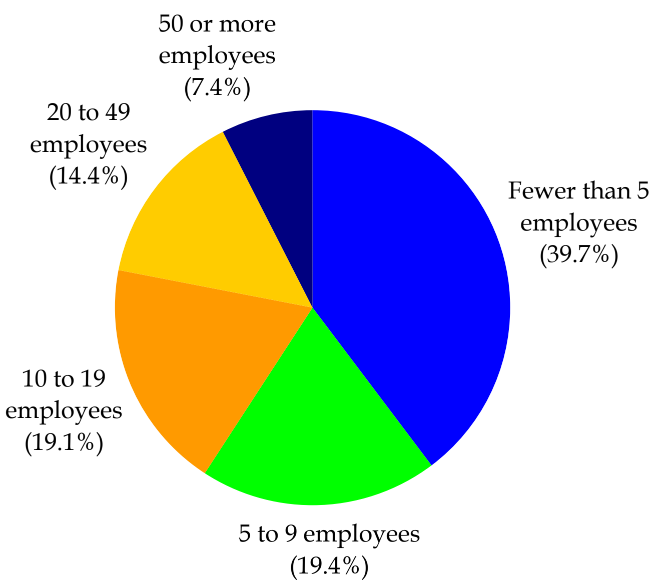
The Moving and Storage Industry Has 1.5 Times More Jobs than the Auto Manufacturing Industry



SOURCE: 2005 County Business Patterns, United States, U.S. Census Bureau.

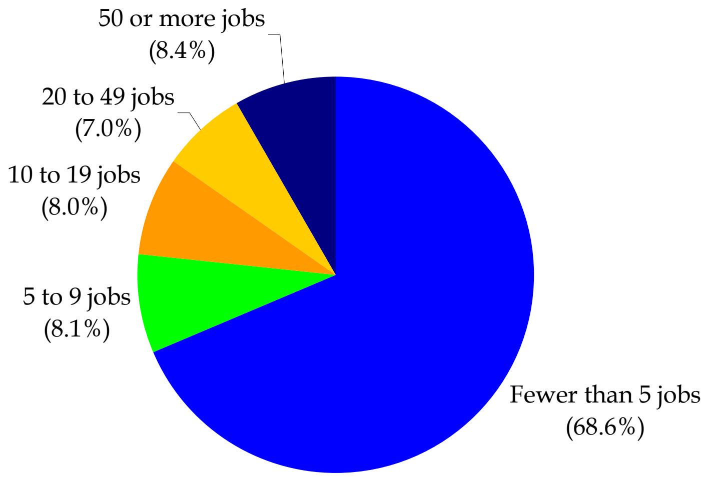
Figure 9

Nearly 40% of Industry Companies with Payroll Employ Fewer than Five People (% of industry companies with payroll)



SOURCE: Nathan Associates Inc. from Census data. See Appendix B.

Figure 10
When Independent Contractors Are Included, there Are Fewer than 5 Jobs at Nearly 70% of Industry Establishments (% of industry establishments by number of job s)



SOURCE: "Establishment and Firm Size: 2002," 2002 Economic Census, Transportation and Warehousing, U.S. Census Bureau, November 2005, Table 5, pp 121 and 141.

And Contributing to the Economy of Every State

The business of moving and storage is conducted in every state, creating opportunities for small businesses, earning sales revenues on myriad service lines, making payroll, and providing jobs (Table 3). Although business is conducted in every state, seven states are home to half of all industry business establishments (Figure 11). Eight states are home to half of the industry payroll of $3.6 billion, as well as half of all industry jobs (Figure 12).

Business establishments and jobs in the long-distance segment are more evenly dispersed throughout the states (Figure 13). In the local segment, the top five states account for nearly half of both segment establishments (46%) and jobs (42%). In the long-distance segment, the top five states account for just over a third of both segment establishments (39%) and jobs (36%).

Table 3
Industry Businesses, Jobs, and Payroll in Every State

State	Establishments /a	Payroll /b	Jobs /c
Alabama	221	$46,948,889	1,568
Alaska	63	$17,098,447	566
Arizona	349	$67,219,926	2,327
Arkansas	111	$9,985,632	518
California	2,258	$402,398,003	13,586
Colorado	311	$64,471,851	2,178
Connecticut	229	$49,206,897	1,674
Delaware	31	$8,223,104	266
District of Columbia	29	$4,929,942	170
Florida	1,711	$262,855,597	9,317
Georgia	509	$91,753,942	3,491
Hawaii	43	$9,896,473	339
Idaho	63	$10,469,752	410
Illinois	629	$146,191,793	4,873
Indiana	290	$183,998,103	5,885
Iowa	131	$38,706,799	1,213
Kansas	124	$34,825,945	1,131
Kentucky	143	$33,283,130	1,103
Louisiana	144	$31,003,710	1,027
Maine	59	$16,984,315	559
Maryland	363	$87,023,322	2,915
Massachusetts	397	$92,956,769	3,142
Michigan	462	$89,644,583	3,058
Minnesota	253	$57,304,258	1,818
Mississippi	93	$21,649,182	708
Missouri	351	$74,245,397	2,467
Montana	53	$14,300,542	458
Nebraska	92	$23,932,432	772
Nevada	122	$24,086,703	832
New Hampshire	88	$13,069,602	494
New Jersey	700	$151,918,793	5,174
New Mexico	85	$21,254,641	690
New York	1,283	$247,380,897	8,540
North Carolina	445	$101,888,099	3,769
North Dakota	42	$13,213,699	417
Ohio	567	$121,745,761	4,308
Oklahoma	192	$34,444,557	1,253
Oregon	169	$45,204,007	1,467
Pennsylvania	511	$117,129,520	3,901
Rhode Island	71	$17,428,346	574
South Carolina	214	$37,773,970	1,512
South Dakota	42	$11,350,345	360
Tennessee	298	$52,527,036	1,893
Texas	1,350	$190,938,559	7,350
Utah	89	$22,162,910	728
Vermont	24	$6,330,613	213
Virginia	433	$162,218,193	5,366
Washington	380	$86,076,476	2,990
West Virginia	41	$11,163,604	361
Wisconsin	265	$73,852,666	2,372
Wyoming	47	$15,136,218	479
U.S. total	16,968	$3,569,803,950	122,582

a. Includes employer and nonemployer businesses.

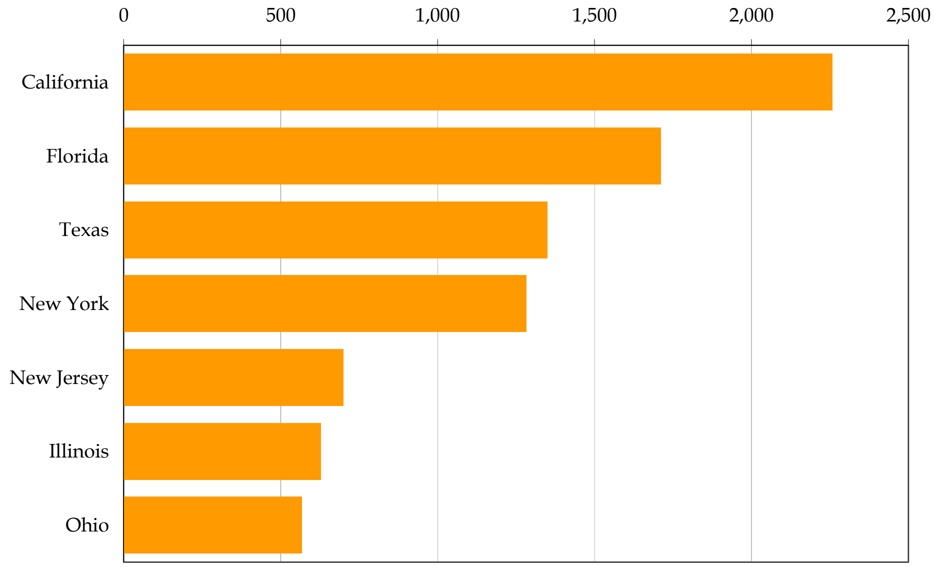
b. Includes employer businesses only. Nonemployer businesses have no employees and, hence, no payroll.

c. Includes employer and nonemployer businesses. For nonemployer businesses, establishments are counted as "employees."

SOURCE: See Appendix D, Table D-1 and, for industry segments, Tables D- 2 through D-4.

Figure 11

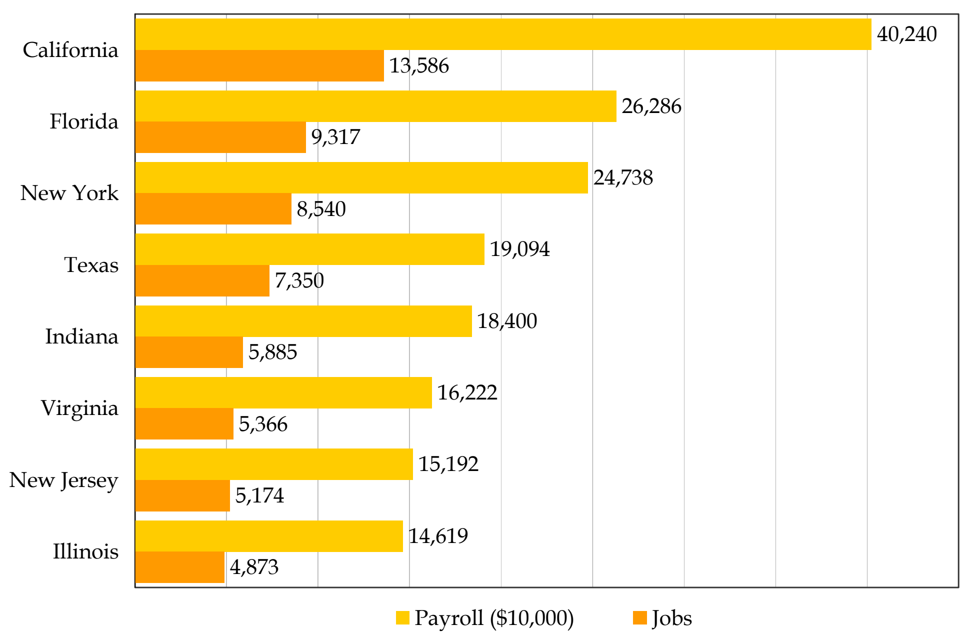
Half of Industry Business Establishments Are in Seven States



SOURCE: See Table 3.

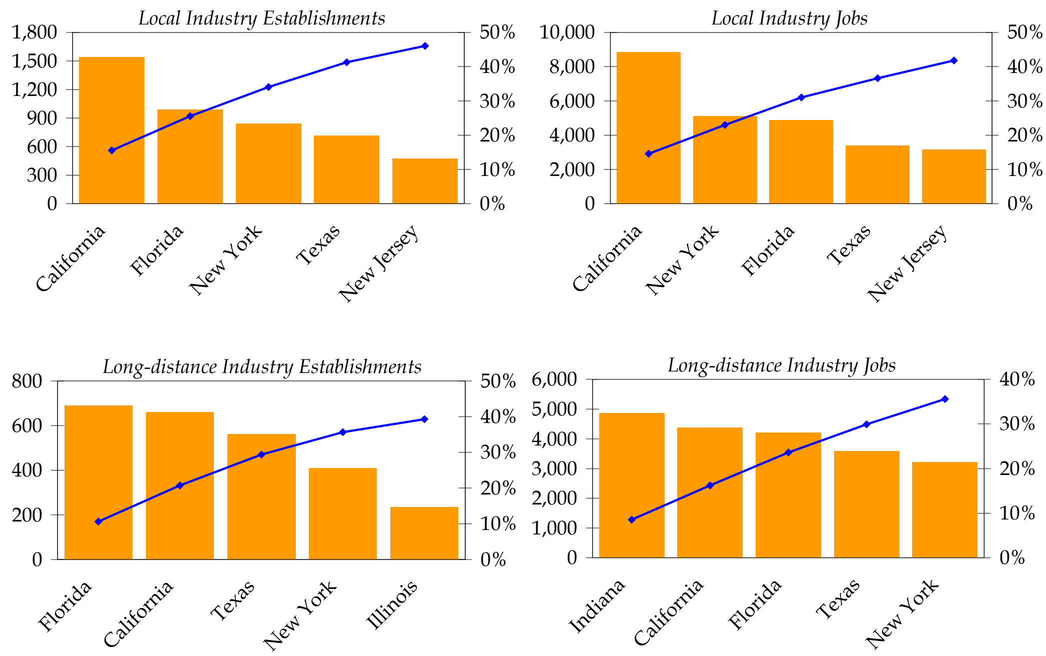
Figure 12

Half of Industry Jobs and Payroll Are in Eight States



SOURCE: See Table 3.

Figure 13
The Top Five States Account for a Greater Share of Establishments and Jobs in the Local Moving and Storage Industry Segment than They Do in the Long-distance Segment (establishments and jobs by industry segment and state and cumulative percentages by industry segment and state)



SOURCE: See Appendix D, Tables D-2 and D-3.

Industry revenue by state, which is presented in Table 4, is an incomplete accounting of revenue because of the Census Bureau's need to honor its non-disclosure agreements with survey respondents. For example, no revenue is reported for the state of Missouri even though it is home to the UniGroup, Inc., the parent company of two leading moving and storage industry companies, United Van Lines and Mayflower Transit, as well as other subsidiary businesses in the industry.

Nevertheless, an analysis of industry revenue by state for states in which revenue is reported reveals that the top five states account for 52.5% of local moving services revenue and 46.9% of long-distance revenue (Figure 14).[18] As with business establishments and jobs, revenue is more concentrated in the top five states for businesses that primarily provide local moving and storage services than it is for businesses that primarily provide long-distance moving and storage services.

[18] Note that if revenue were reported for Missouri, the concentration of industry revenue in the top five states could look significantly different.

Table 4

Indiana Captures Most Revenue in the Segment of the Industry that Primarily Provides Long-distance Moving and Storage Services and California Captures Most Revenue in the Local Segment of the Industry ($)

State	Local Industry Segment	Long-distance Industry Segment	Warehousing and Storage Segment
Alabama	38,506,721	68,826,029	NR
Alaska	52,040,663	12,664,637	NR
Arizona	NR	NR	NR
Arkansas	13,365,173	21,682,047	2,857,351
California	970,553,795	695,261,941	37,984,323
Colorado	92,825,364	160,356,945	NR
Connecticut	115,545,188	126,552,156	NR
Delaware	NR	NR	-
District of Columbia	NR	NR	-
Florida	220,798,018	297,286,755	NR
Georgia	101,087,852	230,023,050	27,140,068
Hawaii	999,920	17,001,644	NR
Idaho	9,004,632	20,835,622	NR
Illinois	317,453,060	526,206,228	NR
Indiana	41,339,665	1,765,585,446	3,658,155
Iowa	11,304,432	158,906,972	NR
Kansas	29,544,384	72,876,463	NR
Kentucky	31,980,474	73,685,044	NR
Louisiana	18,114,901	51,492,174	NR
Maine	23,872,501	25,799,663	NR
Maryland	NR	160,317,343	NR
Massachusetts	215,182,246	152,646,527	NR
Michigan	NR	261,831,150	7,358,530
Minnesota	68,084,036	172,349,331	28,497,377
Mississippi	11,978,107	41,230,816	NR
Missouri	NR	NR	12,178,684
Montana	18,077,187	17,035,394	NR
Nebraska	14,643,965	76,946,101	NR
Nevada	38,372,135	29,038,890	NR
New Hampshire	23,844,872	33,597,888	-
New Jersey	370,006,501	237,408,240	NR
New Mexico	17,606,584	26,114,002	NR
New York	467,385,844	313,965,301	NR
North Carolina	96,727,962	228,346,121	5,556,810
North Dakota	NR	19,033,731	-
Ohio	110,735,687	285,271,428	41,208,318
Oklahoma	29,275,732	79,148,503	2,039,324
Oregon	33,835,387	74,545,280	NR
Pennsylvania	171,995,782	199,164,402	NR
Rhode Island	218,910	NR	-
South Carolina	26,675,303	61,663,476	4,467,158
South Dakota	NR	13,161,021	-
Tennessee	35,396,363	167,145,480	14,852,068
Texas	305,838,972	533,051,875	84,315,928
Utah	30,764,956	36,436,753	NR
Vermont	10,888,797	NR	-
Virginia	248,058,264	246,256,480	12,405,195
Washington	116,502,406	203,204,096	3,124,067
West Virginia	10,794,027	16,167,567	NR
Wisconsin	63,355,465	139,071,036	NR
Wyoming	7,323,311	17,503,586	NR
U.S. total /a	5,298,448,947	10,707,871,659	483,369,736

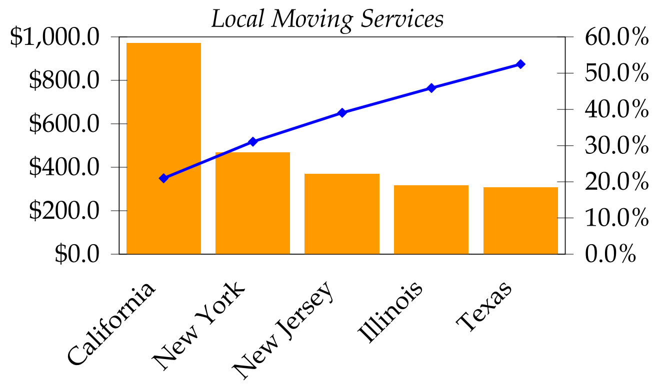
Note: NR means not reported for non-disclosure reasons and "-" means reported as no revenue.

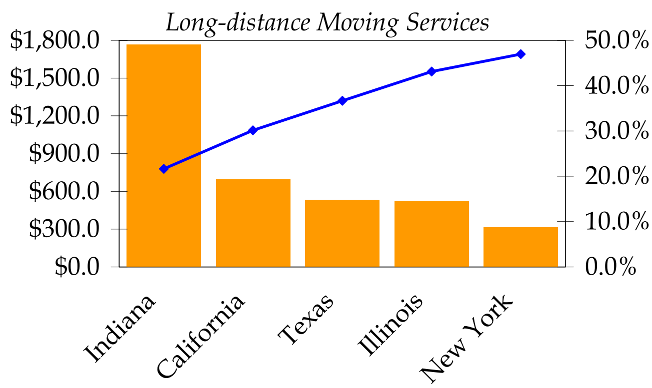
a. U.S. total will be greater than the sum of reported state values.

SOURCE: See Appendix D, Tables D-2 through D-4.

Figure 14

The Top Five States Account for a Greater Share of Revenue in the Local Moving and Storage Industry Segment than They Do in the Long-distance Segment (revenue by industry segment and state in $million and cumulative percentages of revenue by industry segment and state)





SOURCE: See Table 4.

3. Industry Impacts

The total impact of the moving and storage industry on the U.S. economy consists of direct and indirect effects. Direct effects occur as the industry provides the services its customers demand and are measured by the industry's characteristics. Indirect effects occur as industry businesses and employees purchase products and services of other industries. Spending ripples throughout the economy, stimulating demand for goods and services of other industries and ensuring a total economic impact in excess of the direct effect on the moving and storage industry itself.

This report presents estimates of the total impact on household earnings and jobs, as well as tax revenues. Household earnings and job impacts are estimated using total-direct-effect multipliers for household earnings and employment in the truck transportation industry.[19] These multipliers are estimated by the U.S. Bureau of Economic Analysis using its Regional Input-Output Modeling System (RIMS II).[20] They indicate total household earnings and employment in the economy per dollar of household earnings of industry employees and per industry employee, respectively. Hence, it is necessary to have estimates of moving and storage industry jobs (which we derived and presented earlier), as well as household earnings of moving and storage industry employees.

Household earnings are not equivalent to payroll. They include wages, salaries, and other compensation available to employees for spending on goods and services. The earnings of moving and storage industry employees were approximately $3 billion in 2005.[21] This estimate excludes legally required benefits such as employers' costs for social security,

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[19] Estimates of total impacts do not include impacts of the warehousing and storage segment of the industry. Incomplete data on the segment prevent its inclusion. Hence, impacts presented her are underestimated, but because of the relatively small size of the segment, not significantly so.

[20] See "Regional Multipliers, A User Handbook for the Regional Input-Output Modeling System (RIMS II)," Third Edition, March 1997, Bureau of Economic Analysis, Economics and Statistics Administration, U.S. Department of Commerce.

[21] Because payroll is not available for non-employer businesses, the estimate of household earnings in the moving and storage industry does not include earnings of independent contracting businesses that do not have payroll. Hence, the impact of the moving and storage industry on total household earnings is understated.

Medicare, federal and state unemployment insurance, workers' compensation, and retirement and savings benefits. Household earnings were approximately 85% of industry payroll.

Tax revenue impacts include federal and state personal income taxes collected on direct and indirect household earnings, federal business income taxes collected on the income of moving and storage companies, and sales and use taxes paid by the industry. Sales and use taxes, which contribute revenue to the Federal Highway Trust Fund, include federal excise taxes on truck purchases, diesel fuel consumption, and tires, as well as the heavy vehicle use tax.

$8.9 Billion in Household Earnings, 353,000 Jobs, $1.2 Billion in Income Tax Revenue, and $191 Million in Federal Highway Trust Fund Revenue Can Be Attributed to the Moving and Storage Industry

As can be seen in Table 5, directly and indirectly the moving and storage industry generated $8.9 billion in household earnings in 2005; created 353,000 jobs, and generated more than $1.2 billion in income tax revenue for the U.S. and state economies. In addition, the industry contributes $191 million of tax revenue annually to the Federal Highway Trust Fund.

Approximately two-thirds of the total impact on household earnings and jobs is generated indirectly as spending by moving and storage industry employees and businesses is received as income and then spent by employees and businesses of other industries (see Appendix E, Table E-1 for details). In addition to the spending of household earnings by moving and storage industry employees, the industry itself spent $7 billion in 2005 on equipment, materials, parts and supplies, insurance, and services such as electricity and advertising, among others. Spending by moving and storage industry employees and businesses initiates a rippling of inter-industry spending that culminates in the indirect effect of the industry.

Indirect effects vary from state to state, reflective of the extent to which the economy of a state is "self sufficient" in producing the products and services consumed by the industry and its employees (again see Appendix E, Table E-1 for details by state). Not surprisingly, the smallest indirect effects are found in the District of Columbia, where only 44% of the total impact on household earnings in the "state" is an indirect effect and only 29% of the total job impact in the "state" is an indirect effect. The largest indirect effects are found on the economy of Illinois, where 70% of the household earnings and job impacts are indirect effects.

Table 5
Total Impact of the Moving and Storage Industry on U.S. Household Earnings, Jobs, and Income Tax Revenue in 2005 by State

State	Household Earnings ($)	Jobs	Income Tax Revenue ($)
Alabama	116,353,240	4,540	8,397,302
Alaska	37,024,049	1,479	2,930,401
Arizona	161,705,440	6,673	11,911,491
Arkansas	24,588,514	1,582	2,039,936
California	1,071,010,802	40,388	96,306,993
Colorado	171,580,212	6,568	15,213,766
Connecticut	106,972,255	3,962	10,888,698
Delaware	18,087,970	662	1,709,640
District of Columbia	7,472,773	238	783,675
Florida	622,959,144	24,347	42,230,237
Georgia	247,225,701	10,554	18,681,318
Hawaii	22,012,711	890	2,206,460
Idaho	29,481,461	1,138	2,408,117
Illinois	413,899,758	15,868	33,827,025
Indiana	466,813,512	18,574	40,322,526
Iowa	92,146,015	3,488	9,078,901
Kansas	91,315,076	3,627	8,005,557
Kentucky	80,706,522	3,137	7,206,515
Louisiana	78,474,645	3,063	5,567,561
Maine	39,152,614	1,535	4,301,263
Maryland	206,582,032	7,681	17,750,369
Massachusetts	209,415,226	7,769	23,334,007
Michigan	216,024,223	8,807	19,264,058
Minnesota	144,177,511	5,228	15,027,265
Mississippi	50,796,111	1,977	3,306,516
Missouri	186,604,277	7,488	16,409,840
Montana	33,055,495	1,287	3,238,652
Nebraska	60,527,622	2,397	5,519,393
Nevada	51,270,200	2,033	3,309,767
New Hampshire	38,601,403	1,300	3,280,987
New Jersey	401,962,856	15,340	36,538,128
New Mexico	49,757,462	1,926	3,965,324
New York	525,121,492	19,362	50,885,527
North Carolina	260,138,931	11,094	22,245,017
North Dakota	31,442,825	1,192	2,851,045
Ohio	319,002,469	13,811	31,566,950
Oklahoma	90,747,535	3,966	7,546,130
Oregon	111,697,489	4,543	12,013,217
Pennsylvania	300,352,409	11,781	27,549,459
Rhode Island	36,892,884	1,390	3,622,380
South Carolina	91,402,552	4,429	7,075,295
South Dakota	24,976,657	951	1,845,430
Tennessee	136,282,445	5,858	9,087,052
Texas	537,931,419	22,883	32,897,104
Utah	61,299,599	2,584	4,480,040
Vermont	13,772,093	585	1,462,562
Virginia	395,879,684	14,587	35,500,140
Washington	220,515,134	8,898	16,411,076
West Virginia	23,998,887	906	2,187,888
Wisconsin	180,892,100	7,388	18,016,190
Wyoming	31,641,566	1,226	2,352,508
U.S. total	8,941,745,006	352,981	1,204,987,666 /a

a. U.S. total includes sum of federal and state personal income tax revenues plus $440.4 million of federal business income tax revenue collected on moving and storage industry income.

SOURCES: Nathan Associates Inc. See Appendix E for details.

Estimated income tax revenues are primarily federal income taxes (see Appendix E, Table E-2 for details). Just over half (51.5% or $620 million) of the tax revenue impact was revenue from the federal personal income tax. Only 12% of the impact or $144 million was state personal income tax revenue. The remaining $440 million of federal revenue was collected on the business income of the moving and storage industry.

In addition to income tax revenue attributable to the moving and storage industry, the industry itself pays excise and use taxes totaling approximately $191 million annually. These taxes contribute to the Federal Highway Trust Fund. They consist of $58 million in federal diesel fuel taxes;[22] $130 million in federal excise taxes on truck purchases, the heavy vehicle use tax, and tire taxes which all apply to combination trucks;[23] and $3 million in tire taxes that apply to straight trucks.[24]

The Total Impact Is Greatest on the Economy of California

California benefits most from the presence of the industry. In the state's economy, more than $1 billion of household earnings and more than 40,000 jobs can be attributed to the industry (Figure 15). In addition, more than $96 million in federal and state personal income tax revenue can be attributed directly and indirectly to the state's moving and storage industry (Figure 16).[25]

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[22] According to AMSA, the industry travels 1.2 billion interstate miles each year, which consumes 240 million gallons of diesel fuel based on an average usage rate of five miles per gallon. The diesel fuel sales tax is $0.243 per gallon.

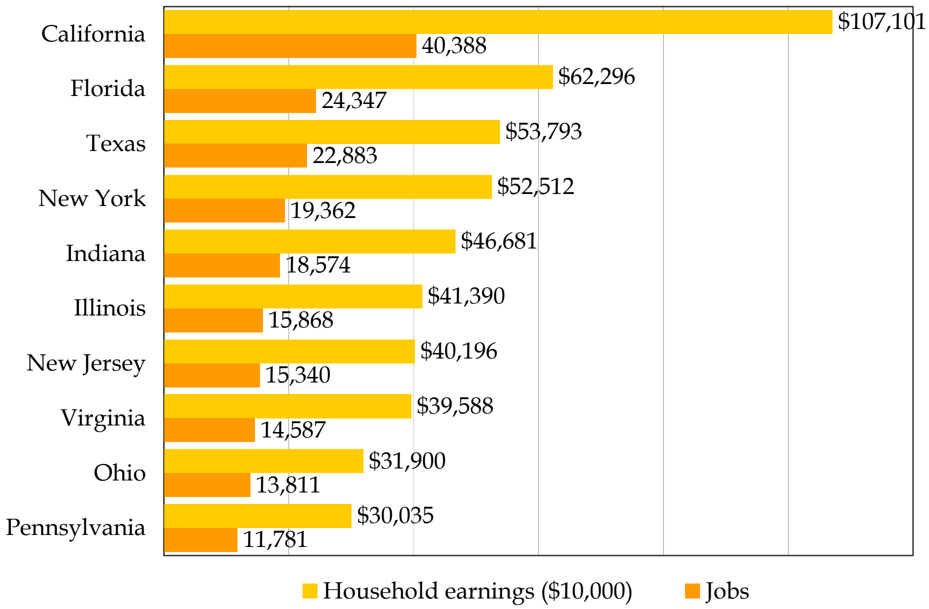
[23] According to AMSA, the industry consists of approximately 72,300 combination trucks (vehicles that consist of a separate power unit (tractor) and at least one trailer). Based on a useful life of 10 years, a purchase price of $100,000, and a federal excise tax of 12%, the federal excise tax per truck per year is $1,200 (0.12 x $100,000 ÷ 10). The heavy vehicle use tax, which is paid on a sliding scale, was estimated at $550 per industry vehicle per year. The federal tire tax, which is also paid on a sliding scale, was estimated at $50 per vehicle per year. In total, excise and use taxes paid per combination truck per year are approximately $1,800 ($1,200 + $550 + $50).

[24] Only the tire tax applies to straight trucks. A straight truck is a vehicle with the cargo body and tractor mounted on the same chassis. AMSA estimates 50,500 straight trucks in the industry, each of which pays $50 per year in tire taxes.

[25] Tax revenue impacts in California and all other states do not include federal tax revenue collected on moving and storage industry business income. Federal business income tax revenue is estimated for the U.S. in total. Incomplete accounting of industry revenue by state precludes allocation of the U.S. total to specific states.

Figure 15

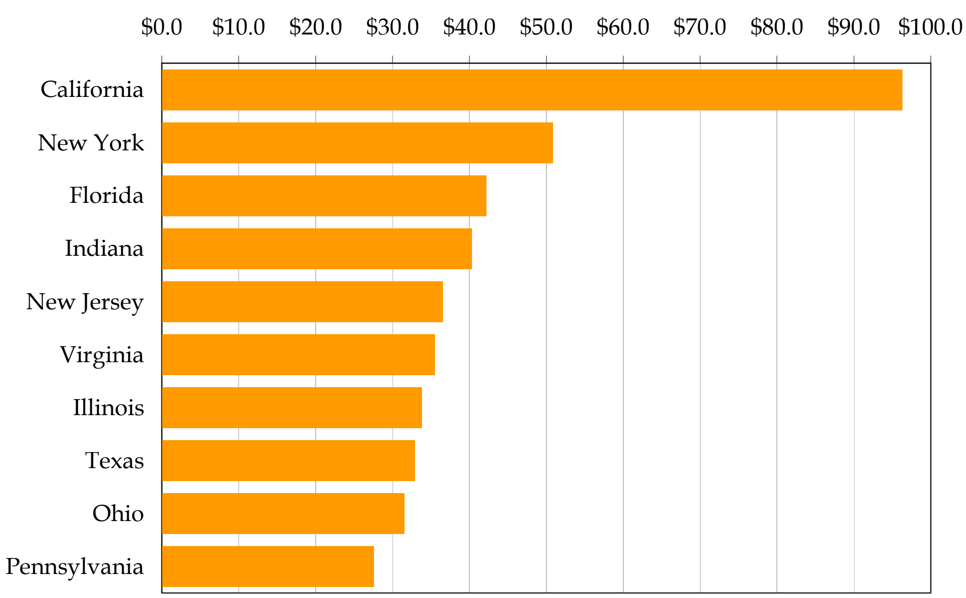
The Economy of California Benefits Most from the Moving and Storage Industry: Household Earnings Attributable to the Industry Total Over $1 Billion and More than 40,000 Jobs in California Can be Attributed to the Industry



SOURCE: See Table 5.

Figure 16

Tax Revenue Impact on the Economy of California Is at Least Twice as Great as the Impact on Other State Economies



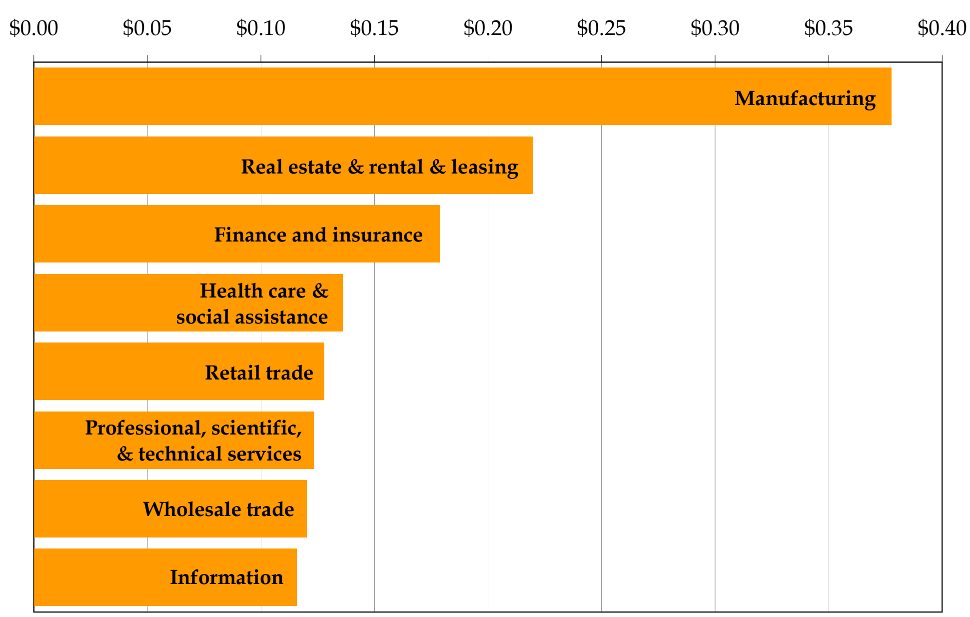
SOURCE: See Table 5.

The Total Impact Is Greatest on Manufacturing and Real Estate and Rental and Leasing

Some sectors benefit more than others from spending by industry businesses and employees. The manufacturing sector benefits most, followed closely by the real estate and rental and leasing sector (Figure 17).

- Manufacturing sector output—primarily manufacturing of motor vehicles, bodies and trailers, and parts—increases $0.38 for every $1.00 increase in demand for services provided by the moving and storage industry. The manufacturing economies of Indiana, Illinois, Texas, Ohio, and Kentucky are the leading beneficiaries of moving and storage industry activity.
- Real estate and rental and leasing sector output—primarily the output of the industry of lessors of mini-warehouses and self-storage units—increases $0.22 for every $1.00 increase in demand for moving and storage industry services. The impact on this sector is relatively evenly distributed across all states.

Figure 17
The Manufacturing Sector Benefits Most from the Moving and Storage Industry ($ of sector output per $ of moving and storage industry output)



SOURCE: Nathan Associates Inc. from RIMS II of the Bureau of Economnic Analysis.

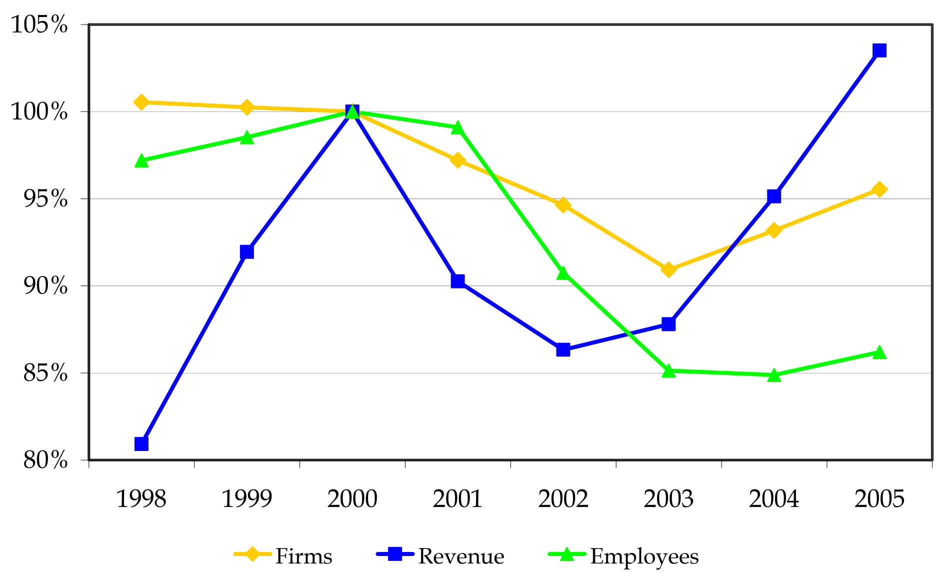
4. Industry Trends

In addition to being seasonal, the industry is cyclical. Job and residential mobility and, hence, activity in the moving and storage industry change with changes in overall economic activity. As the economy expands, mobility increases; as it contracts, mobility decreases.

In 2005 (the most recent year for which all industry-wide data are available), the industry had not yet recovered from the 2001 recession (Figure 18). Although nominal revenue in 2005 had climbed above its 2000 value, real revenue had not. The 3.5% nominal increase in revenue between 2000 and 2005 was less than half the increase in the producer price index (PPI) for the industry. In other words, the industry's real output has declined since 2000. In addition, as of 2005, industry jobs remained nearly 14% lower than the industry's high point of 2000, payroll remained nearly 7% lower, and the number of firms remained nearly 4.5% lower.

Figure 18

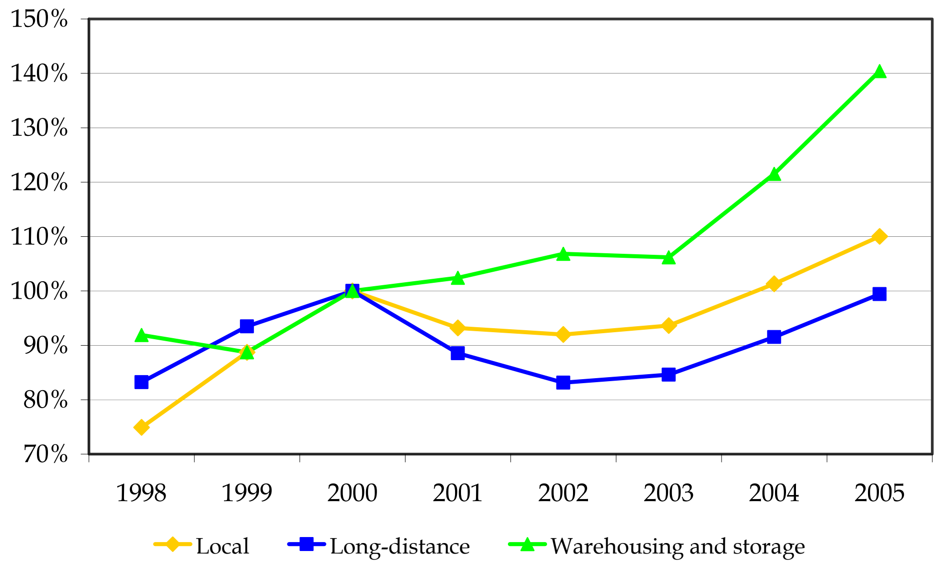
The Moving and Storage Industry Is Still Recovering from the 2001 Recession – Real Total Revenue in 2005 Remained Less than Pre-Recession Revenue



SOURCE: Nathan Associates Inc. See Appendix A,Table A-1.

A closer look at trends by industry segment reveals varying degrees of progress in recovery from the recession. Even in nominal terms, 2005 revenue in the long-distance segment remained just under what it had been in 2000 (Figure 19). However, 2005 nominal revenue in the warehousing and storage segment, admittedly a small part of the overall industry, was 40% greater than in 2000. Although real output of the local and long-distance moving segments was less in 2005 than in 2000, real output of the warehousing and storage segment has increased since 2000.

Figure 19
Only in the Warehousing and Storage Segment Was Real Revenue in 2005 Greater than Pre-Recession Revenue

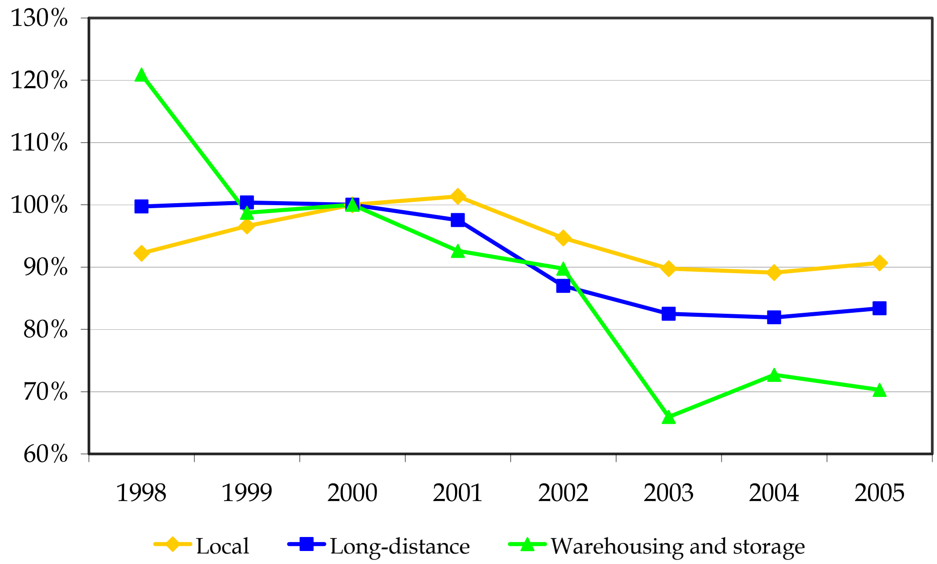


SOURCE: Nathan Associates Inc. See Appendix A, Table A-4.

Although jobs in the industry as a whole trended down from 2001 through 2004, the impact of the recession on industry employment also varied by industry segment (Figure 20). Jobs in the long-distance and warehousing segments had been declining leading up to the recession, and continued falling in 2002 and 2003 before leveling off and slightly increasing. Jobs in the local segment were not as severely affected by the recession, and were, in fact, increasing leading up to it.

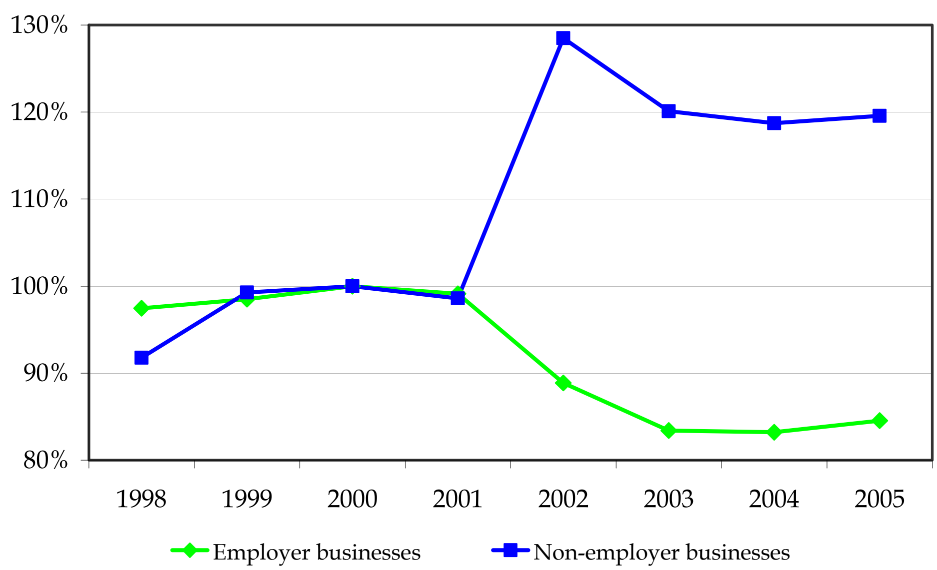
Although total industry jobs have trended down since 2000, jobs at industry businesses without payroll—independent contractors—were 20% higher in 2005 (Figure 21). This increasing use of independent contractors reflects increasing reliance on businesses that provide service when needed, thereby minimizing the need to lay off industry employees during times declining demand.

Figure 20
Total Jobs in Each Segment of the Industry Have Trended Down Since the Recession



SOURCE: Nathan Associates Inc. See Appendix A, Table A-6.

Figure 21
Job Opportunities for Independent Contractors Have Increased Since the Recession



SOURCE: Nathan Associates Inc. from Census Bureau statistics.

AMSA data on van line shipments and revenue also reveal the cyclical nature of the industry, and, more important, how the industry must rely on diverse lines of business to remain viable during swings in the business cycle (Figure 22). In 2002, the economy was still feeling the effects of recession. Relatively few people were moving to new jobs and homes. Not surprisingly, fewer than half (44.8%) of van line shipments in 2002 were of household goods. Revenue generated by household goods shipments, in absolute and percentage terms, was lower in 2002 than in any subsequent year.

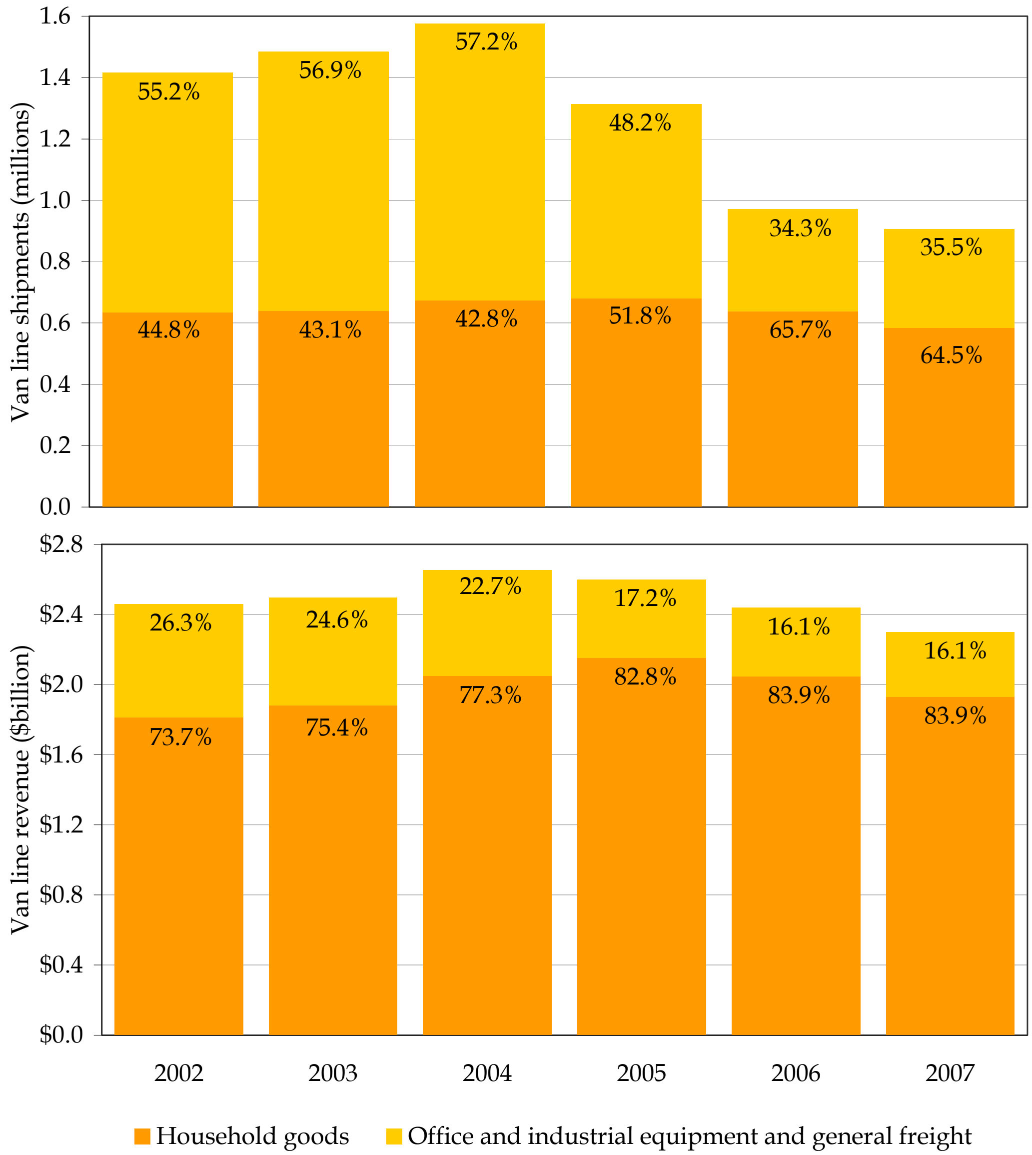
To cope with the effects of the recession and the decline in household demand for moving and storage services, van lines provided moving and storage services for office and industrial equipment and general freight. Revenue from such shipments as a share of total revenue was higher in 2002 than in any subsequent year.

As the economy began to recover, the number of people moving to new jobs and homes began to increase and, as a result, household goods shipments and revenue began to increase—in absolute and percentage terms. But since 2005, the number of people moving each year has declined. Twenty-two percent fewer people moved long distances (outside their current county of residence) in the 12 months ending March 2007 than in the 12 months ending March 2005. As a result, household goods shipments and revenue began to decline. Indeed, total van line shipments and revenue have been declining since 2005.

By 2007, van lines had not yet managed to offset reductions in household goods shipments with increases in shipments of other goods. Office and industrial equipment and general freight shipments and revenue in 2007 were lower in absolute and percentage terms than in any year since 2001. Given the current condition of housing markets and the overall economy, the industry is bracing for a long and slow recovery.

Figure 22

As Residential Mobility Began to Decline in 2005, Household Goods Shipments and Revenue Declined without Offsetting Gains in Shipments of Office and Industrial Equipment and General Freight



SOURCE: American Moving and Storage Association, Monthly Market Study.

5. Conclusions

The analysis presented in this report supports three broad conclusions regarding what to expect from the moving and storage industry in the near future. First, as a result of the current decline in general economic activity and the housing markets, fewer people will be moving in search of new jobs and homes. Hence, the demand for moving and storage services for household goods will continue to decline, and the industry will continue to seek business opportunities transporting and warehousing items other than household goods. Second, as demand for the industry's services declines, there will be increasing reliance on independent contractors, especially in the long-distance segment. Finally, the direct effects on the industry itself from declining demand will be accompanied by indirect effects on other industries throughout the United States. The inter-relationships between the moving and storage industry and other industries ensure that a decline in activity in the moving and storage industry will ripple through the economies of all states, resulting in state-wide declines in household earnings, jobs, and tax revenues.

Although the industry is bracing for a long and slow recovery, it will overcome the current downturn in general economic activity by diversifying its business lines and seeking efficiencies from greater reliance on independent contractors. The moving and storage industry will continue to

- Make it easier for people to move in search of new jobs or homes and thereby promote economic growth,
- Be a source of small business development and growth, as well as a source of jobs and incomes throughout the United States,
- Stimulate the economies of every state,
- Stimulate other industries, and
- Generate tax revenues for the federal and state governments.

Appendix A

Characteristics of the Moving and Storage Industry, 1998-2005

Table A-1

Characteristics of the Moving and Storage Industry, 1998-2005 /a

Characteristic	1998	1999	2000	2001	2002	2003	2004	2005
Firms /b	8,478	8,452	8,432	8,196	7,979	7,666	7,857	8,056
Establishments /c	15,799	16,192	16,156	15,812	17,685	16,624	16,719	16,968
Revenue ($million) /d	12,890	14,646	15,930	14,377	13,753	13,986	15,154	16,490
Payroll ($million) /e	3,469	3,621	3,833	3,823	3,475	3,179	3,445	3,570
Employees /f	138,235	140,127	142,215	140,940	129,051	121,066	120,718	122,582

a. The moving and storage industry consists of establishments classified by North American Industrial Classification System (NAICS) codes 4842101 (specialized freight trucking of used household and office goods, local, without storage), 4842102 (specialized freight trucking of used household and office goods, long-distance), 4842103 (specialized freight trucking of used household and office goods, local, with storage), and 4931901 (household goods warehousing and storage). We do not include enterprise support establishments in the industry. Such establishments primarily provide services to other establishments of the same enterprise and the services they provide do not generate revenue for the establishments or enterprise. For example, a household goods retailer might have warehousing and storage services provided by an establishment that is part of the retail enterprise, but the establishment does not generate revenue from warehousing and storing the household goods.

b. See Table B for distribution of industry characteristics by firm size. Firms do not include nonemployer businesses, which are accounted for under establishments.

c. A single physical location at which business is conducted. It is not necessarily identical to a firm, which might consist of more than one establishment. The count includes establishments that were in business at any time during the year. Both employer and nonemployer businesses are included.

d. Consists of revenue from all business activities of employer and nonemployer businesses. Excludes sales and other taxes collected from customers and paid directly by the firm to a local, state, or federal tax agency. See Tables C-1 and C-2 for revenue by product and service line.

e. For employer businesses, includes all forms of compensation such as salaries, wages, commissions, dismissal pay, bonuses, vacation allowances, sick leave pay, and employee contributions to a qualified pension plan paid during the year to all employees and reported on IRS from 941 as taxable Medicare wages and tips (even if not subject to income or FICA tax). For corporations, payroll includes amounts paid to officers and executives. For unincorporated businesses, it does not include profit or other compensation of proprietors or partners. Payroll is reported before deductions for social security, income tax, insurance, and union dues. Nonemployer businesses have no employees and therefore are not included in payroll.

f. For employer businesses, includes paid employees for pay period including March 12. Paid employees include full and part time employees; salaried officers and executives of corporations; and employees on paid sick leave, paid holidays, and paid vacations. Not included are proprietors and partners of unincorporated businesses, full and part time leased employees, and temporary staffing obtained from a service. For nonemployer businesses, the number of nonemployer establishments is counted as "employment."

SOURCES: Nathan Associates Inc. from data reported by the U.S. Census Bureau, Economics and Statistics Administration, U.S. Department of Commerce in Economic Census, Transportation and Warehousing, Geographic Area Series, 1997 and 2002; Nonemployer Statistics 1998 through 2005; County Business Patterns, 1998 through 2005; the Service Annual Survey: Truck Transportation, Messenger Services, and Warehousing, 1998-2005; and Statistics of U.S. Businesses. See Tables A-2 through A-6 for characteristics by industry segment.

Table A-2

Number of Firms in the Moving and Storage Industry by Industry Segment, 1998-2005 /a

Industry Segment	1998	1999	2000	2001	2002	2003	2004	2005
Specialized freight trucking								
Used household & office goods, local, without storage	3,004	3,040	3,084	3,039	2,999	2,891	2,957	3,034
Used household & office goods, local, with storage	2,020	1,958	1,902	1,793	1,692	1,631	1,668	1,712
Subtotal, used household & office goods, local	5,024	4,998	4,986	4,832	4,691	4,522	4,625	4,746
Used household & office goods, long-distance	3,236	3,234	3,240	3,155	3,077	2,966	3,034	3,112
Total	8,260	8,232	8,226	7,987	7,768	7,488	7,659	7,858
Household goods warehousing and storage	218	220	206	209	211	178	198	198
Grand total, moving and storage industry	8,478	8,452	8,432	8,196	7,979	7,666	7,857	8,056

a. Firms do not include nonemployer businesses, which are accounted for under establishments.

SOURCES: As cited in Table A-1, excluding County Business Patterns and the Service Annual Survey.

Table A-3

Number of Establishments in the Moving and Storage Industry by Industry Segment, 1998-2005 /a

Industry Segment	1998	1999	2000	2001	2002	2003	2004	2005
Specialized freight trucking								
Used household & office goods, local, without storage	5,539	5,785	5,867	5,831	6,625	6,229	6,243	6,334
Used household & office goods, local, with storage	3,722	3,722	3,614	3,438	3,738	3,514	3,522	3,574
Subtotal, used household & office goods, local	9,261	9,508	9,481	9,268	10,363	9,743	9,765	9,908
Used household & office goods, long-distance	5,965	6,152	6,163	6,052	6,796	6,390	6,404	6,498
Total	15,226	15,660	15,644	15,320	17,159	16,132	16,170	16,407
Household goods warehousing and storage	574	532	512	492	526	492	549	562
Grand total, moving and storage industry	15,799	16,192	16,156	15,812	17,685	16,624	16,719	16,968

a. See note "c" of Table A-1.

SOURCES: As cited in Table A-1, excluding Statistics of U.S. Businesses.

Table A-4

Revenue of the Moving and Storage Industry by Industry Segment, 1998-2005 /a ($million)

Industry Segment	1998	1999	2000	2001	2002	2003	2004	2005
Specialized freight trucking								
Used household & office goods, local, without storage	1,360	1,736	2,087	2,059	2,137	2,175	2,353	2,556
Used household & office goods, local, with storage	2,248	2,537	2,728	2,429	2,293	2,334	2,525	2,743
Subtotal, used household & office goods, local	3,608	4,273	4,816	4,488	4,431	4,509	4,878	5,298
Used household & office goods, long-distance	8,965	10,068	10,770	9,536	8,954	9,112	9,858	10,708
Total	12,573	14,340	15,585	14,024	13,385	13,621	14,736	16,006
Household goods warehousing and storage	316	305	344	353	368	366	418	483
Grand total, moving and storage industry	12,890	14,646	15,930	14,377	13,753	13,986	15,154	16,490

a. See note "d" of Table A-1.

SOURCES: As cited in Table A-1, excluding Statistics of U.S. Businesses.

Table A-5

Annual Payroll of the Moving and Storage Industry by Industry Segment, 1998-2005 /a ($million)

Industry Segment	1998	1999	2000	2001	2002	2003	2004	2005
Specialized freight trucking								
Used household & office goods, local, without storage	494	579	675	735	721	665	718	746
Used household & office goods, local, with storage	878	906	938	916	810	747	807	838
Subtotal, used household & office goods, local	1,372	1,484	1,613	1,651	1,531	1,411	1,525	1,584
Used household & office goods, long-distance	1,902	1,969	2,048	2,007	1,783	1,643	1,775	1,844
Total	3,273	3,454	3,661	3,658	3,314	3,054	3,300	3,427
Household goods warehousing and storage	195	167	171	165	160	125	145	142
Grand total, moving and storage industry	3,469	3,621	3,833	3,823	3,475	3,179	3,445	3,570

a. See note "e" of Table A-1.

SOURCES: As cited in Table A-1, excluding Statistics of U.S. Businesses.

Table A-6

Employees of the Moving and Storage Industry by Industry Segment, 1998-2005 /a

Industry Segment	1998	1999	2000	2001	2002	2003	2004	2005
Specialized freight trucking								
Used household & office goods, local, without storage	25,641	28,648	31,383	33,494	33,002	31,276	31,051	31,583
Used household & office goods, local, with storage	36,204	36,150	35,689	34,489	30,500	28,926	28,728	29,234
Subtotal, used household & office goods, local	61,845	64,798	67,072	67,983	63,502	60,202	59,779	60,818
Used household & office goods, long-distance	68,150	68,602	68,330	66,646	59,434	56,370	55,986	56,976
Total	129,995	133,401	135,402	134,629	122,936	116,573	115,765	117,794
Household goods warehousing and storage	8,240	6,726	6,813	6,311	6,115	4,493	4,952	4,789
Grand total, moving and storage industry	138,235	140,127	142,215	140,940	129,051	121,066	120,718	122,582

a. See note "f" of Table A-1.

SOURCES: As cited in Table A-1, excluding Statistics of U.S. Businesses.

Appendix B

Moving and Storage Industry Characteristics by Size of Business Firms

Table B

Characteristics of the Moving and Storage Industry by Industry Segment and Firm Size

Industry Segment and Firm Size Interval	Firms	Revenue	Payroll	Employees
Specialized freight trucking				
Used household & office goods, local, with and without storage				
Fewer than 5 employees	43.4%	8.1%	5.4%	6.9%
5 to 9 employees	21.5%	9.1%	8.2%	10.3%
10 to 19 employees	17.8%	15.1%	15.7%	17.4%
20 to 49 employees	12.3%	26.1%	27.4%	26.2%
50 to 99 employees	3.6%	19.0%	20.1%	17.4%
100 or more employees	1.5%	22.6%	23.0%	21.8%
All firm sizes	100.0%	100.0%	100.0%	100.0%
Used household and office goods, long-distance				
Fewer than 5 employees	36.5%	2.5%	2.6%	3.5%
5 to 9 employees	16.9%	3.0%	4.1%	5.4%
10 to 19 employees	22.1%	7.5%	12.2%	14.4%
20 to 49 employees	16.9%	14.7%	21.3%	23.5%
50 to 99 employees	4.8%	11.0%	15.1%	14.6%
100 or more employees	2.8%	61.4%	44.7%	38.5%
All firm sizes	100.0%	100.0%	100.0%	100.0%
Household goods warehousing and storage				
Fewer than 5 employees	23.9%	7.0%	1.1%	1.1%
5 to 9 employees	14.9%	8.1%	2.1%	2.1%
10 to 19 employees	14.5%	17.6%	4.3%	4.1%
20 to 49 employees	19.5%	30.8%	12.6%	12.2%
50 to 99 employees	10.6%	15.6%	16.1%	15.7%
100 or more employees	16.6%	20.9%	63.9%	64.8%
All firm sizes	100.0%	100.0%	100.0%	100.0%
Total moving and storage industry				
Fewer than 5 employees	39.7%	4.4%	3.5%	4.6%
5 to 9 employees	19.4%	5.1%	5.4%	7.0%
10 to 19 employees	19.1%	10.1%	12.3%	14.1%
20 to 49 employees	14.4%	18.7%	22.3%	22.8%
50 to 99 employees	4.5%	13.6%	17.2%	16.0%
100 or more employees	2.9%	48.0%	39.3%	35.6%
All firm sizes	100.0%	100.0%	100.0%	100.0%

NOTE: Does not include nonemployer businesses.

SOURCE: "Establishment and Firm Size: 2002 (Including Legal Form of Organization)," Table 5, 2002 Economic Census, Transportation and Warehousing, Subject Series, U.S. Census Bureau, Economic and Statistics Administration, U.S. Department of Commerce, November 2005.

Appendix C

Revenue-Generating Product and Service Lines of the Moving and Storage Industry

Table C-1

Product and Service Lines Offered by the Moving and Storage Industry
(percentage of industry establishments earning revenue from the product or service)

Product and Service Line	Specialized Freight Trucking of Used Household and Office Goods: Local	Specialized Freight Trucking of Used Household and Office Goods: Long Distance	Specialized Freight Trucking of Used Household and Office Goods: Total	Household Goods Warehousing and Storage	Grand Total
Motor carrier and storage related services					
Long-distance motor carrier service	42.5%	100.0%	65.3%	37.3%	64.8%
Local motor carrier service	100.0%	77.2%	91.0%	63.4%	90.5%
Packing/packaging services related to motor carrier and storage activities	40.9%	63.8%	50.0%	62.1%	50.2%
Contract/public warehousing and storage	31.2%	45.6%	36.9%	100.0%	38.0%
Process, physical distribution, and logistics consulting	1.8%	2.9%	2.3%	5.6%	2.3%
Physical processing/transforming of goods related to motor carrier and storage activities	2.5%	2.9%	2.6%	7.5%	2.7%
Order assembly services related to motor carrier and storage activities	2.4%	2.0%	2.2%	8.7%	2.3%
Courier and messenger services, including parcel delivery	1.9%	1.1%	1.6%	0.0%	1.5%
Other motor carrier and storage related services	19.3%	36.0%	25.9%	57.1%	26.5%
Sales of other merchandise	11.8%	7.6%	10.1%	41.6%	10.7%
Repair and maintenance, including parts installed	2.1%	2.9%	2.4%	6.2%	2.5%
Collection of garbage and trash, excluding hazardous waste	0.6%	0.0%	0.3%	0.0%	0.3%
All other sources of operating revenue	12.4%	27.2%	18.2%	23.0%	18.3%

NOTE: Does not include nonemployer businesses.

SOURCE: "Product Lines: 2002," Table 1, 2002 Economic Census, Transportation and Warehousing, Subject Series, U.S. Census Bureau, Economics and Statistics Administration, U.S. Department of Commerce, October 2005.

Table C-2

Revenue of the Moving and Storage Industry by Product and Service Line and Industry Segment

Product and Service Line	Specialized Freight Trucking of Used Household and Office Goods			Household Goods Warehousing and Storage	Grand Total
	Local	Long Distance	Total		
Motor carrier and storage related services					
Long-distance motor carrier service	10.5%	60.6%	44.0%	5.2%	42.8%
Local motor carrier service	64.6%	9.2%	27.6%	4.0%	26.8%
Packing/packaging services related to motor carrier and storage activities	6.3%	7.5%	7.1%	5.1%	7.1%
Contract/private warehousing and storage	11.9%	6.3%	8.1%	54.3%	9.6%
Process, physical distribution, and logistics consulting	0.4%	0.2%	0.3%	0.9%	0.3%
Physical processing/transforming of goods related to motor carrier and storage activities	0.4%	0.1%	0.2%	1.7%	0.2%
Order assembly services related to motor carrier and storage activities	0.3%	0.1%	0.1%	2.1%	0.2%
Courier and messenger services, including parcel delivery	0.1%	0.0%	0.0%	0.0%	0.0%
Other motor carrier and storage related services	3.1%	5.6%	4.8%	8.1%	4.9%
Sales of other merchandise	0.7%	0.3%	0.4%	15.7%	0.9%
Repair and maintenance, including parts installed	0.2%	0.4%	0.3%	0.2%	0.3%
Collection of garbage and trash, excluding hazardous waste	0.0%	0.0%	0.0%	0.0%	0.0%
All other sources of operating revenue	1.6%	9.8%	7.0%	2.5%	6.9%
Total	100.0%	100.0%	100.0%	100.0%	109.6%

NOTE: Does not include nonemployer businesses.

SOURCE: "Product Lines: 2002," Table 1, 2002 Economic Census, Transportation and Warehousing, Subject Series, U.S. Census Bureau, Economics and Statistics Administration, U.S. Department of Commerce, October 2005.

Appendix D

Moving and Storage Industry Characteristics by State

Table D-1

Characteristics of the Moving and Storage Industry by State, 2005 /a

State	Establishments /b	Revenue($thousands) /c	Payroll ($thousands) /d	Employment /e
Alabama	221	107,333	46,949	1,568
Alaska	63	64,705	17,098	566
Arizona	349	NR	67,220	2,327
Arkansas	111	37,905	9,986	518
California	2,258	1,703,800	402,398	13,586
Colorado	311	253,182	64,472	2,178
Connecticut	229	242,097	49,207	1,674
Delaware	31	NR	8,223	266
District of Columbia	29	NR	4,930	170
Florida	1,711	518,085	262,856	9,317
Georgia	509	358,251	91,754	3,491
Hawaii	43	18,002	9,896	339
Idaho	63	29,840	10,470	410
Illinois	629	843,659	146,192	4,873
Indiana	290	1,810,583	183,998	5,885
Iowa	131	170,211	38,707	1,213
Kansas	124	102,421	34,826	1,131
Kentucky	143	105,666	33,283	1,103
Louisiana	144	69,607	31,004	1,027
Maine	59	49,672	16,984	559
Maryland	363	NR	87,023	2,915
Massachusetts	397	367,829	92,957	3,142
Michigan	462	269,190	89,645	3,058
Minnesota	253	268,931	57,304	1,818
Mississippi	93	53,209	21,649	708
Missouri	351	12,179	74,245	2,467
Montana	53	35,113	14,301	458
Nebraska	92	91,590	23,932	772
Nevada	122	67,411	24,087	832
New Hampshire	88	57,443	13,070	494
New Jersey	700	607,415	151,919	5,174
New Mexico	85	43,721	21,255	690
New York	1,283	781,351	247,381	8,540
North Carolina	445	330,631	101,888	3,769
North Dakota	42	19,034	13,214	417
Ohio	567	437,215	121,746	4,308
Oklahoma	192	110,464	34,445	1,253
Oregon	169	108,381	45,204	1,467
Pennsylvania	511	371,160	117,130	3,901
Rhode Island	71	219	17,428	574
South Carolina	214	92,806	37,774	1,512
South Dakota	42	13,161	11,350	360
Tennessee	298	217,394	52,527	1,893
Texas	1,350	923,207	190,939	7,350
Utah	89	67,202	22,163	728
Vermont	24	10,889	6,331	213
Virginia	433	506,720	162,218	5,366
Washington	380	322,831	86,076	2,990
West Virginia	41	26,962	11,164	361
Wisconsin	265	202,427	73,853	2,372
Wyoming	47	24,827	15,136	479
U.S. total /g	16,968	16,489,690	3,569,804	122,582

Note: NR means not reported.

a. See footnote "a" of Table A-1 for industry definition. Characteristics of each industry segment by state are presented in Tables D-2 through D-4.

b. Includes employer and nonemployer businesses.

c. Includes employer and nonemployer businesses. Revenue by state for the aggregate industry is not a complete accounting of revenue. For some states and industry segments, revenue is not reported to avoid company disclosure. See Tables D-2 through D-4 for revenue by state for each industry segment.

d. Includes employer businesses only. Nonemployer businesses have no employees and, hence, no payroll.

e. Includes employer and nonemployer businesses, where, for nonemployer businesses, the number of establishments is counted as "employees."

SOURCES: Nathan Associates Inc. from data reported by the U.S. Census Bureau, Economics and Statistics Administration, U.S. Department of Commerce in Economic Census, Transportation and Warehousing, Geographic Area Series, 2002; Nonemployer Business Statistics 2005; County Business Patterns, 2005; the Service Annual Survey: Truck Transportation, Messenger Services, and Warehousing, 2005.

Table D-2

Characteristics of the Local Moving and Storage Industry Segment by State, 2005

State	Establishments /a	Revenue ($thousands) /b	Payroll ($thousands) /a	Employment /a
Alabama	119	38,507	19,634	738
Alaska	41	52,041	9,358	335
Arizona	233	NR	38,100	1,432
Arkansas	70	13,365	3,178	237
California	1,542	970,554	237,954	8,858
Colorado	188	92,825	29,275	1,113
Connecticut	150	115,545	27,459	1,014
Delaware	15	NR	3,385	122
District of Columbia	23	NR	1,990	86
Florida	989	220,798	124,316	4,901
Georgia	271	101,088	32,247	1,415
Hawaii	32	1,000	6,232	229
Idaho	30	9,005	4,512	177
Illinois	369	317,453	69,081	2,545
Indiana	137	41,340	13,690	791
Iowa	50	11,304	10,303	374
Kansas	74	29,544	16,158	583
Kentucky	77	31,980	14,309	527
Louisiana	71	18,115	11,448	432
Maine	39	23,873	9,778	346
Maryland	230	NR	47,545	1,725
Massachusetts	271	215,182	54,328	1,982
Michigan	269	NR	40,514	1,546
Minnesota	122	68,084	23,347	818
Mississippi	43	11,978	7,609	282
Missouri	166	NR	26,536	1,002
Montana	24	18,077	5,058	183
Nebraska	41	14,644	8,104	297
Nevada	79	38,372	13,378	500
New Hampshire	53	23,845	5,771	251
New Jersey	473	370,007	85,563	3,168
New Mexico	39	17,607	8,105	294
New York	843	467,386	135,531	5,112
North Carolina	212	96,728	29,525	1,230
North Dakota	20	NR	4,897	175
Ohio	327	110,736	37,903	1,787
Oklahoma	94	29,276	12,177	455
Oregon	83	33,835	17,891	646
Pennsylvania	270	171,996	49,076	1,815
Rhode Island	43	219	8,212	302
South Carolina	110	26,675	11,867	558
South Dakota	18	NR	3,353	124
Tennessee	134	35,396	13,088	604
Texas	718	305,839	75,925	3,390
Utah	45	30,765	9,533	345
Vermont	20	10,889	4,427	159
Virginia	244	248,058	84,399	2,909
Washington	219	116,502	37,944	1,477
West Virginia	21	10,794	4,572	165
Wisconsin	132	63,355	28,989	1,044
Wyoming	24	7,323	6,121	217
U.S. total /c	9,908	5,298,449	1,583,696	60,818

Note: NR means not reported. Items by state might not sum to U.S. totals because of rounding.

a. 2005 establishments, payroll, and employment were reported by state for the aggregate industry of used household and office goods moving and storage. Industry segment establishments, payroll, and employment are based on 2002 segment shares of total industry establishments, payroll, and employment. Nonemployer businesses are included in establishments and employment, but not payroll.

b. Revenue by state is estimated on the basis of 2002 state shares of U.S. revenue and 2005 U.S. revenue. An entry of "NR" indicates that revenue was not reported in 2002. Hence, there was no basis for estimating revenue in 2005. Includes revenue of nonemployer businesses.

c. When the value of a characteristic is not reported for a state, the U.S. total will be greater than the sum of reported state values.

SOURCES: As cited in Table D-1.

Table D-3

Characteristics of the Long Distance Moving and Storage Industry Segment by State, 2005

State	Establishments /a	Revenue ($thousands) /b	Payroll ($thousands) /a	Employment /a
Alabama	97	68,826	26,209	792
Alaska	20	12,665	6,716	198
Arizona	109	NR	27,263	832
Arkansas	36	21,682	6,050	258
California	659	695,262	149,553	4,378
Colorado	111	160,357	32,807	981
Connecticut	75	126,552	20,497	618
Delaware	16	NR	4,839	145
District of Columbia	6	NR	2,940	84
Florida	688	297,287	133,034	4,215
Georgia	222	230,023	55,159	1,949
Hawaii	9	17,002	2,920	86
Idaho	31	20,836	5,436	216
Illinois	235	526,206	70,549	2,105
Indiana	145	1,765,585	167,207	4,862
Iowa	79	158,907	27,295	802
Kansas	49	72,876	18,028	527
Kentucky	60	73,685	17,233	517
Louisiana	68	51,492	18,361	554
Maine	19	25,800	6,728	197
Maryland	121	160,317	36,713	1,094
Massachusetts	114	152,647	35,579	1,057
Michigan	173	261,831	44,882	1,363
Minnesota	117	172,349	31,695	941
Mississippi	46	41,231	13,126	394
Missouri	169	NR	43,544	1,323
Montana	28	17,035	8,845	262
Nebraska	45	76,946	14,463	428
Nevada	38	29,039	9,173	281
New Hampshire	34	33,598	7,299	243
New Jersey	209	237,408	61,005	1,826
New Mexico	45	26,114	12,808	385
New York	408	313,965	105,995	3,218
North Carolina	216	228,346	68,917	2,448
North Dakota	22	19,034	8,316	243
Ohio	215	285,271	75,500	2,268
Oklahoma	92	79,149	21,615	773
Oregon	75	74,545	24,148	716
Pennsylvania	205	199,164	56,802	1,711
Rhode Island	28	NR	9,216	272
South Carolina	94	61,663	21,790	790
South Dakota	24	13,161	7,997	236
Tennessee	149	167,145	34,018	1,054
Texas	562	533,052	101,495	3,590
Utah	38	36,437	11,315	338
Vermont	4	NR	1,904	54
Virginia	172	246,256	71,143	2,162
Washington	151	203,204	47,258	1,472
West Virginia	19	16,168	6,188	183
Wisconsin	128	139,071	43,379	1,278
Wyoming	22	17,504	8,760	254
U.S. total /c	6,498	10,707,872	1,843,710	56,976

Note: NR means not reported.

a. 2005 establishments, payroll, and employment were reported by state for the aggregate industry of used household and office goods moving and storage. Industry segment establishments, payroll, and employment are based on 2002 segment shares of total industry establishments, payroll, and employment. Nonemployer businesses are included in establishments and employment, but not payroll.

b. Revenue by state is estimated on the basis of 2002 state shares of U.S. revenue and 2005 U.S. revenue. An entry of "NR" indicates that revenue was not reported in 2002. Hence, there was no basis for estimating revenue in 2005. Includes revenue of nonemployer businesses.

c. When the value of a characteristic is not reported for a state, the U.S. total will be greater than the sum of reported state values.

SOURCES: As cited in Table D-1.

Table D-4

Characteristics of the Warehousing and Storage Industry Segment by State, 2005

State	Establishments /a	Revenue ($thousands) /b	Payroll ($thousands) /a	Employment /a
Alabama	4	NR	1,106	38
Alaska	2	NR	1,024	33
Arizona	7	NR	1,857	63
Arkansas	5	2,857	758	24
California	57	37,984	14,892	349
Colorado	12	NR	2,389	84
Connecticut	5	NR	1,251	42
Delaware	-	-	-	-
District of Columbia	-	-	-	-
Florida	34	NR	5,505	200
Georgia	16	27,140	4,347	126
Hawaii	2	NR	745	24
Idaho	1	NR	522	17
Illinois	25	NR	6,561	223
Indiana	8	3,658	3,101	232
Iowa	2	NR	1,109	36
Kansas	1	NR	640	21
Kentucky	7	NR	1,741	59
Louisiana	5	NR	1,195	41
Maine	1	NR	478	15
Maryland	12	NR	2,765	95
Massachusetts	11	NR	3,050	103
Michigan	20	7,359	4,249	148
Minnesota	14	28,497	2,263	59
Mississippi	4	NR	914	32
Missouri	16	12,179	4,165	141
Montana	1	NR	398	13
Nebraska	6	NR	1,365	47
Nevada	5	NR	1,536	52
New Hampshire	-	-	-	-
New Jersey	18	NR	5,351	180
New Mexico	1	NR	341	11
New York	33	NR	5,856	209
North Carolina	17	5,557	3,446	92
North Dakota	-	-	-	-
Ohio	25	41,208	8,343	253
Oklahoma	6	2,039	653	25
Oregon	11	NR	3,165	106
Pennsylvania	36	NR	11,251	376
Rhode Island	-	-	-	-
South Carolina	9	4,467	4,116	164
South Dakota	-	-	-	-
Tennessee	15	14,852	5,422	234
Texas	70	84,316	13,519	371
Utah	6	NR	1,315	45
Vermont	-	-	-	-
Virginia	17	12,405	6,676	295
Washington	10	3,124	874	41
West Virginia	1	NR	403	13
Wisconsin	5	NR	1,485	50
Wyoming	1	NR	256	8
U.S. total /c	562	483,370	142,398	4,789

Note: NR means not reported. Dash indicates not applicable.

a. 2005 establishments, payroll, and employment were reported by state for the aggregate industry of used household and office goods moving and storage. Industry segment establishments, payroll, and employment are based on 2002 segment shares of total industry establishments, payroll, and employment. Nonemployer businesses are included in establishments and employment, but not payroll.

b. Revenue by state is estimated on the basis of 2002 state shares of U.S. revenue and 2005 U.S. revenue. An entry of "NR" indicates that revenue was not reported in 2002. Hence, there was no basis for estimating revenue in 2005. Includes revenue of nonemployer businesses.

c. When the value of a characteristic is not reported for a state, the U.S. total will be greater than the sum of reported state values.

SOURCES: As cited in Table D-1.

Appendix E

Total Economic Impact of the Moving and Storage Industry

Table E-1

Economic Impact of the Demand for Products and Services Provided by the Moving and Storage Industry /a

State	Household Earnings Impact ($thousands)			Employment Impact		
	Direct Effect /b	Indirect Effect	Total	Direct Effect /c	Indirect Effect	Total
Alabama	39,941	76,413	116,353	1,568	2,972	4,540
Alaska	14,522	22,502	37,024	566	913	1,479
Arizona	57,104	104,601	161,705	2,327	4,346	6,673
Arkansas	8,513	16,076	24,589	518	1,064	1,582
California	343,122	727,889	1,071,011	13,586	26,802	40,388
Colorado	54,888	116,692	171,580	2,178	4,389	6,568
Connecticut	41,797	65,176	106,972	1,674	2,288	3,962
Delaware	6,994	11,094	18,088	266	396	662
District of Columbia	4,201	3,271	7,473	170	68	238
Florida	223,463	399,496	622,959	9,317	15,031	24,347
Georgia	78,234	168,992	247,226	3,491	7,063	10,554
Hawaii	8,414	13,599	22,013	339	551	890
Idaho	10,903	18,579	29,481	410	729	1,138
Illinois	124,304	289,596	413,900	4,873	10,995	15,868
Indiana	156,911	309,902	466,814	5,885	12,690	18,574
Iowa	32,958	59,188	92,146	1,213	2,275	3,488
Kansas	29,626	61,689	91,315	1,131	2,496	3,627
Kentucky	28,298	52,409	80,707	1,103	2,034	3,137
Louisiana	26,386	52,089	78,475	1,027	2,036	3,063
Maine	14,420	24,733	39,153	559	976	1,535
Maryland	73,915	132,667	206,582	2,915	4,766	7,681
Massachusetts	78,969	130,447	209,415	3,142	4,627	7,769
Michigan	76,265	139,760	216,024	3,058	5,749	8,807
Minnesota	48,862	95,315	144,178	1,818	3,410	5,228
Mississippi	18,419	32,377	50,796	708	1,269	1,977
Missouri	63,170	123,435	186,604	2,467	5,021	7,488
Montana	12,162	20,893	33,055	458	829	1,287
Nebraska	20,365	40,163	60,528	772	1,625	2,397
Nevada	20,448	30,822	51,270	832	1,201	2,033
New Hampshire	14,192	24,409	38,601	494	806	1,300
New Jersey	129,115	272,848	401,963	5,174	10,165	15,340
New Mexico	18,072	31,686	49,757	690	1,236	1,926
New York	210,282	314,839	525,121	8,540	10,822	19,362
North Carolina	86,881	173,258	260,139	3,769	7,325	11,094
North Dakota	11,248	20,195	31,443	417	774	1,192
Ohio	103,794	215,209	319,002	4,308	9,503	13,811
Oklahoma	29,374	61,374	90,748	1,253	2,713	3,966
Oregon	38,431	73,266	111,697	1,467	3,076	4,543
Pennsylvania	99,564	200,788	300,352	3,901	7,880	11,781
Rhode Island	14,835	22,057	36,893	574	816	1,390
South Carolina	32,197	59,206	91,403	1,512	2,917	4,429
South Dakota	9,669	15,308	24,977	360	591	951
Tennessee	44,773	91,509	136,282	1,893	3,966	5,858
Texas	162,782	375,150	537,931	7,350	15,533	22,883
Utah	18,836	42,463	61,300	728	1,856	2,584
Vermont	5,373	8,399	13,772	213	372	585
Virginia	138,319	257,560	395,880	5,366	9,222	14,587
Washington	74,075	146,440	220,515	2,990	5,908	8,898
West Virginia	9,492	14,506	23,999	361	545	906
Wisconsin	62,818	118,075	180,892	2,372	5,016	7,388
Wyoming	12,873	18,768	31,642	479	747	1,226
U.S. total	3,044,568	5,897,177	8,941,745	122,582	230,399	352,981

a. See footnote "a" of Table A-1 for industry definition.

b. Includes household earnings of industry employees where earnings are estimated to be 85.3% of payroll.

c. Includes employees of industry's employer businesses and establishments of industry's nonemployer businesses.

SOURCES: Nathan Associates Inc. from data reported by the U.S. Census Bureau, Economics and Statistics Administration, U.S. Department of Commerce in Economic Census, Transportation and Warehousing, Geographic Area Series, 1997 and 2002; Nonemployer Business Statistics 2005; County Business Patterns, 1998 through 2005; and the Regional Input-Output Modeling System, 2005.

Table E-2

Tax Impacts of the Moving and Storage Industry, 2005 ($thousands) /a

State	Personal Income Tax /b		Business Income Tax /c	Total
	U.S. Federal	State		
Alabama	6,755	1,642	NA	8,397
Alaska	2,930	NA	NA	2,930
Arizona	10,227	1,685	NA	11,911
Arkansas	1,513	527	NA	2,040
California	73,286	23,021	NA	96,307
Colorado	12,445	2,769	NA	15,214
Connecticut	8,899	1,990	NA	10,889
Delaware	1,329	380	NA	1,710
District of Columbia	556	228	NA	784
Florida	42,230	NA	NA	42,230
Georgia	14,447	4,234	NA	18,681
Hawaii	1,617	590	NA	2,206
Idaho	1,829	579	NA	2,408
Illinois	28,918	4,909	NA	33,827
Indiana	31,779	8,543	NA	40,323
Iowa	6,848	2,231	NA	9,079
Kansas	6,254	1,751	NA	8,006
Kentucky	5,351	1,855	NA	7,207
Louisiana	4,401	1,166	NA	5,568
Maine	3,042	1,260	NA	4,301
Maryland	14,223	3,528	NA	17,750
Massachusetts	17,767	5,567	NA	23,334
Michigan	15,766	3,498	NA	19,264
Minnesota	11,047	3,981	NA	15,027
Mississippi	2,647	659	NA	3,307
Missouri	12,919	3,490	NA	16,410
Montana	2,407	832	NA	3,239
Nebraska	4,199	1,320	NA	5,519
Nevada	3,310	NA	NA	3,310
New Hampshire	3,238	43	NA	3,281
New Jersey	29,836	6,702	NA	36,538
New Mexico	3,138	827	NA	3,965
New York	38,144	12,741	NA	50,886
North Carolina	16,084	6,161	NA	22,245
North Dakota	2,458	393	NA	2,851
Ohio	23,976	7,591	NA	31,567
Oklahoma	5,804	1,742	NA	7,546
Oregon	8,061	3,952	NA	12,013
Pennsylvania	22,704	4,846	NA	27,549
Rhode Island	2,803	819	NA	3,622
South Carolina	5,522	1,553	NA	7,075
South Dakota	1,845	NA	NA	1,845
Tennessee	8,998	89	NA	9,087
Texas	32,897	NA	NA	32,897
Utah	3,353	1,127	NA	4,480
Vermont	1,137	326	NA	1,463
Virginia	27,568	7,932	NA	35,500
Washington	16,411	NA	NA	16,411
West Virginia	1,613	575	NA	2,188
Wisconsin	13,385	4,631	NA	18,016
Wyoming	2,353	NA	NA	2,353
U.S. total	620,270	144,287	440,431	1,204,988

Note: NA means not applicable.

a. See footnote "a" of Table A-1 for industry definition. businesses are included.

b. Includes personal income tax liabilities on total household earnings (direct and indirect effects).

c. Includes business tax liabilities on direct business income of the moving and storage industry. Businesses include corporations, partnerships, and nonfarm sole proprietorships.

SOURCES: Department of the Treasury, Internal Revenue Service ,Statistics of Income Division, "Corporation Income Tax Returns 2005", Table 5: Returns of Active Corporations; Statistics of Income Division, Individual Master File System, January 2007. "Historical Table 2 (SOI Bulletin)"; US Census Bureau Governments Division, State Government Tax Collections Report, 2005 and Quarterly Summary of State & Local Government Tax Revenue, 2005.