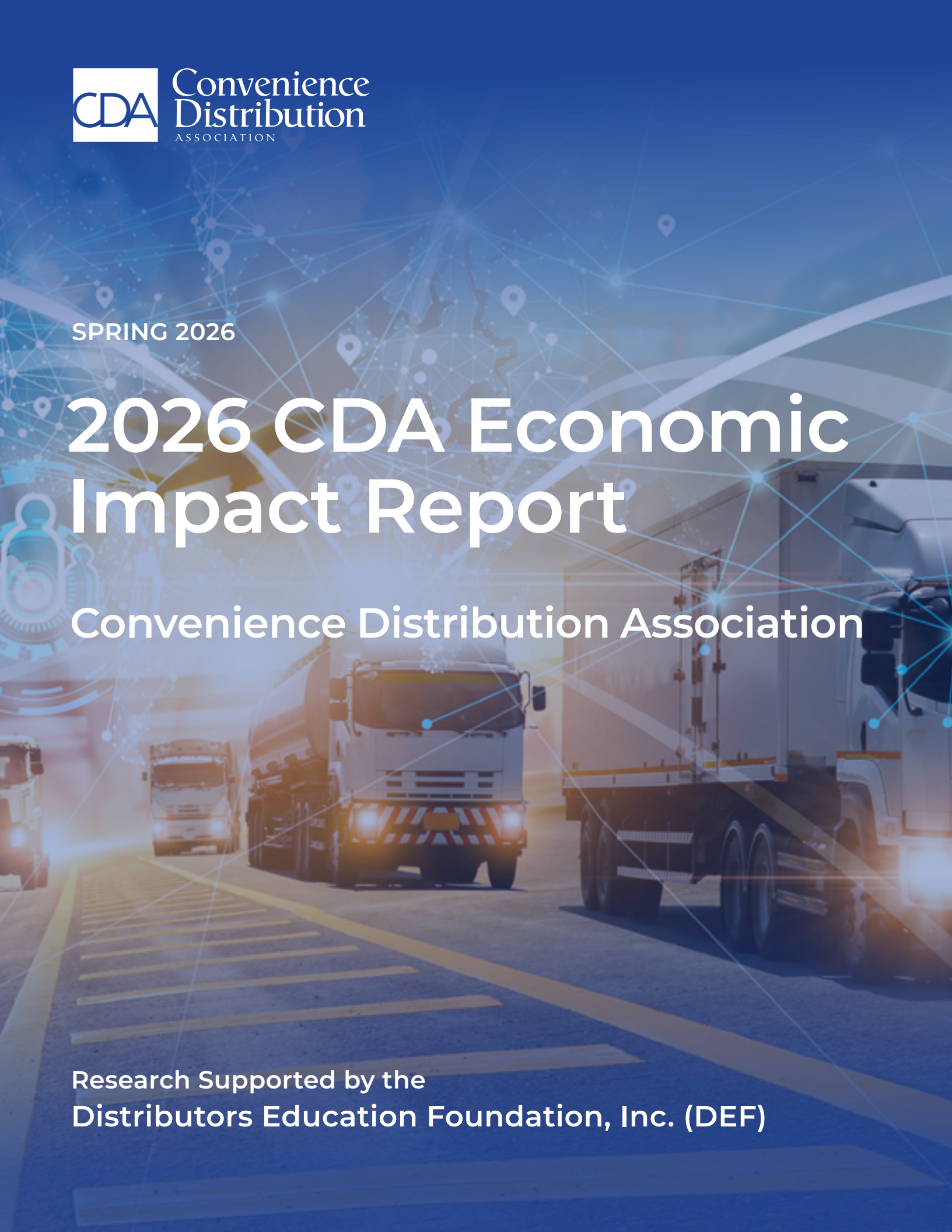
Convenience Distribution Association

SPRING 2026

2026 CDA Economic Impact Report

Convenience Distribution Association



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Foreword

Convenience distribution is the backbone of America's neighborhood retail economy. It is the industry that connects the products people reach for every day, a cold drink on a hot afternoon, a quick snack on the road, a last-minute household essential, with the more than 150,000 convenience stores, gas stations, and small retailers that serve communities in every corner of the country. Behind that simple transaction is a vast and sophisticated supply chain built on relationships, operational excellence, and the hard work of tens of thousands of Americans.

The economic footprint of this industry is far larger than most people realize. Convenience distributors generated $28.3 billion in direct output and employed more than 72,300 workers in 2024, contributing $15.4 billion directly to the United States' Gross Domestic Product (GDP). When the full ripple effects through supply chains and household spending are included, the sector supports over 237,000 jobs, produces $65.9 billion in total economic output, and generates $8.6 billion in tax revenue for federal, state, and local governments. These are not abstract numbers. They represent warehouse workers loading trucks before dawn, drivers navigating routes through rural towns and urban neighborhoods, sales teams helping independent store owners grow their businesses, and the families and communities sustained by those paychecks.

Our industry also plays a unique and critical fiscal role. The sector paid $3.8 billion in federal, state, and local taxes directly, and when indirect and induced effects are included, total tax payments reached $8.6 billion across all levels of government. These payments, which include corporate income taxes, payroll taxes, property taxes, and other levies, support public infrastructure, education, and essential government services. Beyond these contributions, licensed wholesale distributors serve as an essential link in the tax collection system, prepaying tobacco excise taxes, applying required stamps, and maintaining the compliance infrastructure necessary to ensure that regulated products entering the retail market meet all federal, state, and local requirements.

What makes this sector especially important is the nature of the jobs it creates and the communities it serves. Convenience distribution is not concentrated in a handful of coastal cities. It is spread across all 50 states, anchored in regional and rural economies where good jobs matter most. The industry's employment multiplier of 3.3 means that every direct job supports more than two additional positions in transportation, real estate, healthcare, restaurants, and other local services. That kind of economic reach strengthens the fabric of communities from coast to coast.

CDA members are not standing still. They are investing in technology, expanding foodservice programs, adding new product lines, and modernizing operations to meet the changing needs of retailers and consumers. They are navigating inflationary pressures, evolving regulations, and persistent labor challenges with the same resilience and ingenuity that have defined this industry for generations.

Sustaining momentum will require continued attention to the foundations that make efficient distribution possible: well-maintained roads and bridges, rational regulatory frameworks, access to skilled workers, and policies that recognize the essential role wholesale distributors play in keeping America's retail economy running. When policymakers, business leaders, and the public understand the true scale of this industry's contribution, they can make better decisions that support the jobs, communities, and supply chains that depend on it.

This report tells that story with clarity and rigor. I am proud to present it on behalf of CDA's members, the men and women whose daily work ensures that products reach shelves, communities stay served, and local economies stay strong.

RICHARD OWEN

President & Chief Executive Officer
Convenience Distribution Association

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Executive Summary

Convenience distribution is the supply chain behind American neighborhood retail. Distributors move more than 30,000 products from manufacturers to the more than 150,000 convenience stores, gas stations, and small retailers that serve communities in every state.

The sector's direct operations generate $28.3 billion in output and employ more than 72,300 workers

Convenience distributors directly contribute $15.4 billion to U.S. GDP and pay $7.5 billion in wages, salaries, and benefits to their workforce. Direct output per worker averages $391,400, a measure of the operational productivity that allows distributors to move tens of thousands of SKUs to more than 150,000 retail locations nationwide. More than 54 cents of every dollar of output accrues as GDP in the form of wages, profits, and returns to capital, underscoring the sector's role as a value-added service provider rather than a simple pass-through for manufactured goods.

Convenience distribution delivers wages well above the national average

Average compensation for convenience distribution workers reaches approximately $103,900, roughly 33% above the national average. This wage premium reflects the specialized skills required to operate complex distribution networks, including commercial driving credentials, inventory management expertise, regulatory compliance knowledge, and the customer relationship skills that connect manufacturers to retailers. The sector provides solid middle-income opportunities at scale, particularly in warehouse, delivery, and sales roles that do not require a four-year degree, offering accessible career pathways in communities across the country.

The sector's impact extends well beyond its direct footprint

Indirect supply-chain activity added $18.9 billion in output and more than 82,300 jobs as distributors purchased transportation, real estate, insurance, professional services, and other inputs from domestic suppliers. Induced household spending by direct and indirect workers added another $18.6 billion in output and 82,500 jobs as wages flowed into housing, healthcare, restaurants, retail, and education.

Across the economy, the industry supports nearly 237,200 American jobs and produces $65.9 billion in total economic output

The typical convenience distributor generates over $1.5 million in sales per employee, reflecting the operational efficiency and productivity that define this industry.

Combining direct, indirect, and induced impacts, the convenience distribution sector supports 237,159 jobs and generates $65.9 billion in total output across the U.S. economy. The sector's total contribution to GDP reaches $37.2 billion, while total labor income climbs to $20.2 billion, nearly tripling the sector's direct payroll as wages circulate through supplier industries and local service economies in every state.

Each job and dollar in convenience distribution sets off a chain of growth throughout the economy

The employment multiplier of 3.3 means that each direct job in the sector supports more than two additional jobs through supply chains and household spending. The output multiplier of 2.3 indicates that every $1.00 of direct output generates an additional $1.30 elsewhere in the economy. The labor income multiplier of 2.7 shows that each $1.00 in direct wages produces $1.70 more in earnings across supplier industries and local communities.

The sector generates an estimated $8.6 billion in tax revenue for federal, state, and local governments

Direct, indirect, and induced tax payments collectively fund public services and infrastructure at every level of government. Federal tax contributions totaled $5 billion, state-level payments reached nearly $2 billion, and county and local revenues accounted for over $1.6 billion. Beyond these contributions, licensed wholesale distributors play a critical role in the tax collection system, prepaying tobacco excise taxes, applying required stamps, and maintaining the compliance infrastructure that ensures regulated products meet all federal, state, and local requirements before reaching retail shelves.

Convenience distribution supports jobs and economic activity in all 50 states

Few industries match the geographic breadth of convenience distribution, which anchors employment, output, and tax contributions in every state and the District of Columbia. Thirty-six states have more than 500 direct distribution employees, and distribution centers, delivery routes, and warehouse operations reach into suburban industrial parks, small cities, and rural communities far from major metropolitan areas. California, Texas, Florida, New York, and Illinois lead in absolute terms, but mid-sized and smaller states benefit substantially through supplier networks and household spending. This geographic breadth means the sector's jobs, wages, and tax contributions strengthen regional economies in every corner of the country, not just a handful of coastal hubs.

Wholesale distributors are the operational backbone that keeps independent retailers viable

Tens of thousands of independent convenience stores, many owned by first- and second-generation American entrepreneurs, depend on wholesale distributors for the capabilities they cannot build on their own. Distributors manage assortments across more than 30,000 SKUs, develop branded foodservice programs, provide planograms and category management, and offer the data analytics and compliance support that large chains build internally with dedicated teams. Without this infrastructure, most independents could not hold enough assortment to compete or turn inventory fast enough to stay solvent. Each store kept open is a local employer, a sales tax contributor, and often the only retail option in its neighborhood, making convenience distribution a quiet but essential pillar of small-business ownership in communities across the country.

Introduction

The convenience distribution sector occupies a unique and essential position in the American economy. It is the connective tissue between manufacturers and the more than 150,000 convenience stores, gas stations, and small independent retailers that serve communities in every state. Wholesale distributors do not simply move boxes. They curate product assortments, manage complex logistics, provide market intelligence to manufacturers, and offer merchandising, data analytics, and foodservice support to retailers. In doing so, they enable small businesses to compete, consumers to find what they need, and manufacturers to reach markets efficiently.

Ninety-three percent of Americans live within ten minutes of a convenience store and the average visit lasts just three minutes. Behind that speed and accessibility is a distribution network that operates around the clock, managing tens of thousands of product SKUs across sprawling geographic territories. Warehouse workers pick and stage orders, drivers navigate routes that may span hundreds of miles, and sales teams work directly with store owners to optimize shelves and drive revenue. This is not an automated, capital-light industry. It is built on people, relationships, and operational discipline.

The industry is also navigating a period of significant change. Inflationary pressures have raised costs across the supply chain, from fuel and labor to packaging and insurance. Regulatory complexity continues to grow, particularly around tobacco products, where licensed distributors bear the burden of prepaying excise taxes, applying tax stamps, and maintaining compliance systems. At the same time, distributors are investing in technology, expanding foodservice programs, and exploring new product categories to meet evolving consumer demand.

CDA's 2026 Industry Outlook Survey found that more than three-quarters of distributors anticipate sales growth, driven by new customers, foodservice growth, geographic expansion, and the addition of new product lines. Nearly 70% identified greater sales as the primary driver of expected profit improvement, supported by better use of technology and improved pricing models. That research also revealed persistent challenges. Inflation, government regulation, and labor shortages in warehouse and driver positions remain top concerns.

Against this backdrop, it is important to understand the full economic contribution of the convenience distribution sector, not just the activity within its own warehouses and delivery routes, but the ripple effects that flow through supply chains and communities nationwide. Convenience distribution is a foundational part of the American supply chain and a reliable source of employment, income, and fiscal strength in communities of every size.

Definitions & Methodology

The convenience distribution sector encompasses wholesale distributors that specialize in providing a wide range of products to convenience stores, gas stations, and other small-format retailers. These distributors operate as intermediaries between manufacturers and retailers, managing the procurement, warehousing, and delivery of products including snacks, beverages, tobacco, candy, foodservice items, health and beauty aids, general merchandise, and automotive supplies. The sector spans several NAICS industry codes, including wholesale trade in grocery and related products (424410-424490), drugs and druggists' sundries (424210), and tobacco product and electronic cigarette merchant wholesalers (424940).

Economic impacts were estimated through input-output analysis using IMPLAN, a widely adopted model for tracing the flow of goods, services, and income through the U.S. economy. The framework captures not only direct activity within the sector but also the indirect effects through supply chains and the induced effects generated by household spending.

FOUR KEY ECONOMIC METRICS

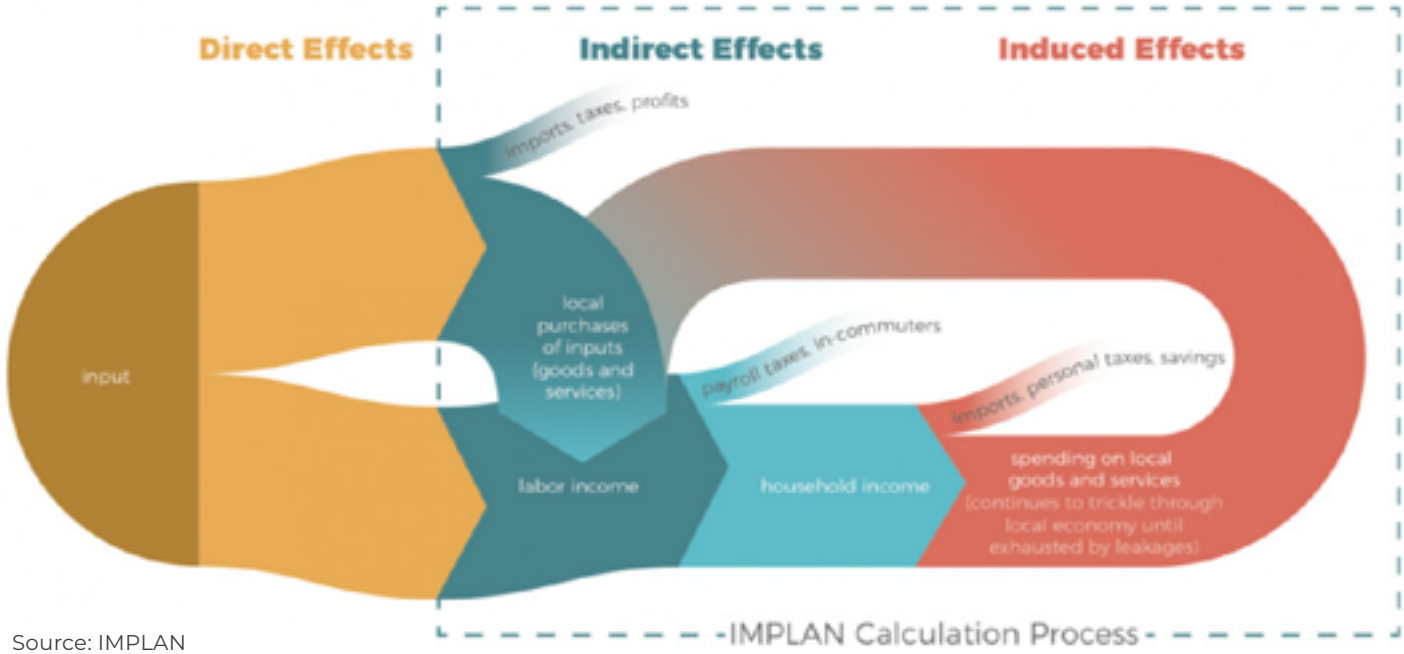
Convenience distribution influences the economy through several distinct channels. To reveal the sector's full footprint, results are organized into three categories that trace activity inside the sector, through its supplier networks, and into household spending across local communities. This structure separates the initial effects of distribution operations from supply chain ripple effects and from the consumer activity supported by those paychecks, providing a clearer view of how warehouse and logistics decisions translate into broader regional and national outcomes. The summaries below define each category and describe how it contributes to the total impact while avoiding double counting.

Employment: The total number of jobs, including full-time, part-time, and self-employed. This figure is an annual average measured in job-years.

Labor Income: The sum of all payments to workers including wages, salaries, benefits, and payroll taxes.

Value Added: The sector's total contribution to Gross Domestic Product (GDP), including labor compensation, taxes on production, and business profits.

THE INPUT-OUTPUT MODEL



Source: IMPLAN

Output: The total value of goods and services produced by a sector. For most industries, this is equivalent to annual sales revenue. For wholesale trade, however, output is measured as the gross wholesale margin, the difference between the cost of goods purchased from manufacturers and the prices charged to retailers, rather than total sales. This convention avoids double-counting products already captured in manufacturing sectors and isolates the economic value of the distribution service provided by wholesalers. Output is the sum of value added and intermediate inputs. For wholesale trade, it represents the full economic value of the distribution service rather than total product sales.

All results are presented in inflation-adjusted 2024 dollars. The model assumes a static economic structure and does not capture dynamic shifts such as price changes or productivity growth, offering instead a snapshot of annual economic relationships within the convenience distribution sector. For additional information on the methodology, please see Appendix A.

Behind every convenience store shelf is a wholesale distributor whose work generates jobs, income, and tax revenue that strengthen communities across America.

TOTAL ECONOMIC IMPACT

INDIRECT IMPACTS

(Backward Linkages)

Supply-chain inputs and upstream business activity

The convenience distribution industry buys supplies, materials, and other services

DIRECT IMPACTS

(Direct Spending)

Employment, income, output and value added within the convenience distribution industry

INDUCED IMPACTS

(Forward Linkages)

Household spending by employees supported by both direct and indirect activities

Direct Impacts

The convenience distribution sector makes substantial direct contributions to the U.S. economy through the daily operations of wholesale distributors who move products from manufacturers to more than 150,000 retail locations nationwide. These companies operate large-scale warehouses, manage complex delivery networks, employ specialized sales forces, and run sophisticated data and compliance systems. The direct economic footprint captures the employment, income, output, and tax contributions generated within the sector itself.

In 2024, the convenience distribution sector generated $28.3 billion in direct output and employed 72,349 workers across the United States. These are the people who pick orders in warehouses, load and drive delivery trucks, manage inventory systems, maintain customer relationships, and administer the regulatory compliance programs that keep products moving legally and efficiently.

Direct value added, which represents the sector's contribution to GDP, totaled $15.4 billion. This means that more than 54 cents of every dollar of output in the sector accrues as GDP in the form of wages, profits, and returns to capital rather than being absorbed by intermediate inputs. This structure reflects the role of wholesalers as intermediaries in the supply chain. Firms in the sector generate economic value through distribution margins, logistics coordination, inventory management, and market access rather than through the production of physical goods. In this environment, human judgment, local market knowledge, and operational execution play a central role in purchasing decisions, supplier relationships, and ensuring that products move efficiently from manufacturers to retailers.

Direct labor income reached $7.5 billion in 2024, representing wages, salaries, and benefits paid to the sector's workforce. The average salary across convenience distribution occupations in 2024 was $103,900, well above the national average wage. This wage premium reflects an industry that provides solid middle-income opportunities at scale, particularly in warehouse operations, delivery, and sales roles that do not require a four-year degree. Management and executive positions lift the average, but the core strength of the sector lies in the breadth of jobs that offer stable pay, benefits, and career pathways in communities across the country. For many workers, convenience distribution represents an accessible on-ramp to economic stability.

Direct output per worker in the convenience distribution sector averaged $391,400 in 2024, reflecting the economic value of the distribution service itself. Warehouse workers, delivery drivers, and sales representatives form the operational core, supported by teams in purchasing, marketing, accounting, IT, and management. Each worker contributes to a chain of activity that includes receiving and staging inventory, assembling orders, navigating delivery routes, maintaining retailer relationships, and managing the compliance systems required for regulated product categories. As distributors invest in route optimization, warehouse automation, and data-driven inventory management, output per worker is likely to continue rising, reinforcing the sector's productivity and economic contribution.

The sector also made a significant fiscal contribution, paying $3.8 billion in federal, state, and local taxes directly. These direct tax payments, which include corporate income taxes, payroll taxes, property taxes, and other levies, support public infrastructure, education, and essential government services. Licensed wholesale distributors also serve a unique function in the broader tax system, prepaying tobacco excise taxes, applying required stamps, and maintaining the compliance infrastructure necessary to ensure that regulated products meet all federal, state, and local requirements before entering the retail market.

TABLE 1. DIRECT ECONOMIC IMPACTS OF U.S. CONVENIENCE DISTRIBUTION

	DIRECT IMPACT
Total Output (Billions $)	$28.30
Value Added (Billions $)	$15.40
Total Labor Income (Billions $)	$7.50
Tax Payments (Billions $)	$3.80
Employment	72,349

Source: Author calculations based on IMPLAN model

CORE-MARK:
National Scale, Local Roots

The company that became Core-Mark opened its doors in 1888. Today it runs 45 distribution centers and six redistribution centers across the U.S. and Canada, employs more than 12,000 people, services over 50,000 retail locations, and ships roughly $26 billion in wholesale product each year. It is the largest broadline distributor in the convenience channel and part of the publicly traded Performance Food Group. Its footprint touches all 50 states and multiple Canadian provinces, and its supply chain reaches from global manufacturers to the corner store on a rural highway.

But ask Bill Stein, Core-Mark's executive vice president of enterprise growth, what makes the business tick, and the answer sounds a lot like the family-run distributors that dot the industry. "If you go to Leitchfield, Kentucky, we're the largest employer," he says. In Carroll, Iowa, the local distribution center functions as a town anchor. Core-Mark is the type of employer a small community organizes itself around.

That pattern repeats across the network. Each distribution center employs hundreds of people across every function: warehouse workers, drivers, salespeople, procurement, finance, IT. These are full-time jobs with healthcare, benefits, and bonus opportunities, and the wages they generate cycle back through local economies in the form of housing, retail spending, school taxes, and small business demand. Core-Mark keeps many of those roles local on purpose. "Every geography is different. There's weather, new business, lost business, productivity, spoilage, shrink. You can't do that remotely. You have to be present."

A Career Ladder that Starts at the Loading Dock

Core-Mark's promote-from-within culture has a track record to prove it. Stein started as a truck driver in college, was hired as a sales rep in Los Angeles in 1992, and spent three decades moving through sales, food service, marketing, and regional leadership before reaching the executive team. The company's CEO began as vacation relief. At a recent executive meeting, the VP of operations celebrated his 40th anniversary. "I have two direct reports," Stein says. "Between the three of us, we have a hundred years of experience."

Of the 45 distribution center presidents, roughly 60% rose through sales and 30% through operations, with the rest from finance, procurement, or other functions. For workers in the communities Core-Mark serves, that mobility represents one of the more durable forms of economic opportunity a regional employer can offer: a path from an entry-level warehouse or driving job to management, without a four-year degree as a prerequisite.

Hundreds of Salespeople on the Street

For independent retailers, many of them first or second generation Americans, Core-Mark functions as a back office: providing services like loyalty platforms, branded food programs developed by in-house chefs, and a 36,000-SKU catalog. More than half of the food cases Core-Mark ships are its own brands, manufactured in-house. That vertical integration lets the company control quality and offer independent retailers private-label programs that would otherwise be available only to the largest national chains.

The economic ripple of that relationship is significant. The roughly 96,000 independent convenience stores in the U.S. employ hundreds of thousands of workers and generate billions in local tax revenue, but most operate on margins too thin to support enterprise-grade technology, category management, or food program development on their own. Core-Mark's scale gives those independents access to the same capabilities the largest chains take for granted, allowing them to compete, retain customers, and stay open. When a single-store operator survives another year, the jobs, the tax base, and the neighborhood amenity all survive with it.

Built to Last

Core-Mark has grown from roughly 3,000 employees when Stein joined to more than 12,000 today, expanding through organic market share gains and periodic acquisitions of family-run distributors as generational transitions play out across the industry. Each acquisition folds another community into the network and preserves jobs that might otherwise disappear when a founding family exits. The result is a company that operates at national scale but shows up locally: as the largest employer in towns across the country, as the back office for tens of thousands of independent retailers, as the place where a truck driver can become an executive.

Indirect & Induced Impacts

The economic contributions of the convenience distribution sector extend far beyond its direct footprint. Through supply chain purchases and household spending, the sector generates substantial indirect and induced effects that ripple across nearly every corner of the U.S. economy. In 2024, indirect activities added $18.9 billion in output and more than 82,300 jobs, while induced impacts contributed an additional $18.6 billion in output and 82,500 jobs. Together, these multiplier effects expand the sector's total reach by $37.6 billion in output and 164,800 jobs, underscoring how convenience distribution drives growth well beyond the companies and workers directly engaged in the industry.

INDIRECT IMPACTS

Indirect impacts capture the activity of supplier industries that provide goods and services to convenience store distributors. When distributors purchase fuel for their fleets, lease warehouse space, buy insurance, hire professional services, or invest in technology systems, they create demand that supports employment and output in those supplier industries.

The pattern of indirect spending reveals the operational intensity of convenience distribution. Every dollar a distributor spends on staffing, warehousing, insurance, technology, or transportation creates demand in a supplier industry, and those supplier industries in turn support their own networks of employees,

TABLE 2. INDIRECT OUTPUT BY INDUSTRY

NAICS	INDUSTRY	INDIRECT OUTPUT (MILLIONS $)	% SHARE
56	Administrative, Employment, and Support Services	$1,675.6	8.8%
55	Management of Companies and Enterprises	$1,606.8	8.5%
531	Real Estate	$1,454.4	7.7%
521-523, 525	Financial Intermediation and Investment Services	$1,030.4	5.4%
524	Insurance Carriers and Related Activities	$939.8	5.0%
334	Computer and Electronic Product Manufacturing	$733.7	3.9%
518-519	Cloud, Data, and Information Services	$709.5	3.7%
48	Transportation	$697.2	3.7%
533	Lessors of Nonfinancial Intangible Assets	$691.3	3.6%
492	Couriers and Express Delivery Services	$618.0	3.3%
493	Warehousing and Storage	$509.1	2.7%
221	Utilities	$497.3	2.6%
5418	Advertising, Public Relations, and Related Services	$353.6	1.9%
5411	Legal Services	$344.6	1.8%
5412	Accounting, Tax Preparation, Bookkeeping, and Payroll Services	$310.7	1.6%
491	Postal Service	$284.8	1.5%
	All Other Industries	$6,492.7	34.3%
	Total Indirect Output	**$18,949.4**	**100%**

Source: Author calculations based on IMPLAN model

vendors, and service providers. The result is an upstream ecosystem that generates approximately $0.67 of additional economic activity for every $1.00 of direct distributor output. The employment effects are even more pronounced: for every worker employed directly by a convenience distributor, the supply chain supports more than one additional job in industries ranging from logistics and financial services to professional consulting and real estate.

Administrative, employment, and support services leads all industries with $1.68 billion in indirect output and nearly 13,850 jobs, the single largest source of both indirect output and employment. This reflects the sector's reliance on staffing agencies, temporary labor services, and administrative support as distributors scale operations to meet seasonal demand, manage workforce turnover, and maintain the flexibility required to serve thousands of retail accounts on tight delivery schedules. Warehouse labor in particular fluctuates with order volume, promotional cycles, and new product launches, making employment services a structural feature of the industry's supply chain rather than a discretionary expense.

Management of companies and enterprises follows closely at $1.61 billion, reflecting the coordination and oversight required to manage multi-location wholesale operations. Many CDA member companies operate multiple distribution centers, serve retailers across several states, and manage complex portfolios of manufacturer relationships. The management layer that supports these operations, from corporate planning and financial oversight to regional coordination and compliance management, generates significant economic activity in its own right.

Real estate is another significant channel, contributing $1.45 billion as distributors lease and operate warehouse facilities, office space, and distribution centers across the country. The physical footprint of convenience distribution is substantial. A typical distributor operates tens of thousands of square feet of warehouse space, including temperature-controlled storage for perishable and frozen products. As the industry expands into foodservice and fresh categories, demand for cold-chain infrastructure is growing, further deepening the sector's real estate footprint and its economic contribution to local property markets.

Financial intermediation and investment services generated $1.03 billion in indirect output, while insurance carriers and related activities added $940 million. Together, these financial and risk management services account for $1.97 billion in indirect output, underscoring the capital requirements inherent in operating large vehicle fleets, maintaining extensive inventories, and managing the credit relationships that connect manufacturers, distributors, and retailers. Distributors extend credit to retail customers, finance inventory purchases, and carry the working capital needed to bridge the gap between procurement and payment. The financial services sector benefits directly from this capital intensity.

Technology and information services are increasingly important to the distribution supply chain. Computer and electronic product manufacturing contributed $734 million in indirect output, while cloud, data, and information services added $710 million. These figures reflect the sector's growing investments in inventory management systems, route optimization software, electronic ordering platforms, and data analytics tools. CDA's 2026 Industry Outlook Survey found that more than half of distributors identified better use of technology as a key driver of expected profit improvement. As distributors deploy more sophisticated systems to manage demand forecasting, warehouse automation, and real-time delivery tracking, the technology supply chain that supports these investments will continue to grow.

TABLE 3. INDIRECT EMPLOYMENT BY INDUSTRY

NAICS	INDUSTRY	INDIRECT EMPLOYMENT (PERSONS)	% SHARE
56	Administrative, Employment, and Support Services	13,842	16.8%
492	Couriers and Express Delivery Services	12,315	15.0%
531	Real Estate	6,161	7.5%
55	Management of Companies and Enterprises	5,817	7.1%
493	Warehousing and Storage	4,935	6.0%
48	Transportation	3,868	4.7%
521-523, 525	Financial Intermediation and Investment Services	2,881	3.5%
524	Insurance Carriers and Related Activities	2,175	2.6%
491	Postal Service	2,025	2.5%
5412	Accounting, Tax Preparation, Bookkeeping, and Payroll Services	1,915	2.3%
5416	Management Consulting Services	1,495	1.8%
5418	Advertising, Public Relations, and Related Services	1,335	1.6%
5411	Legal Services	1,201	1.5%
	All Other Industries	22,348	27.2%
	Total Indirect Employment	**82,313**	**100%**

Source: Author calculations based on IMPLAN model

Transportation and logistics channels are also critical enablers. Transportation contributed $697 million in indirect output and 3,868 jobs, while couriers and express delivery services generated $618 million and more than 12,300 positions, the second largest source of indirect employment. Warehousing and storage added $509 million and nearly 5,000 jobs. Together, these logistics industries account for more than $1.82 billion in indirect output and over 21,100 jobs, highlighting the movement-intensive nature of an industry built around getting the right products to the right stores at the right time. The Postal Service contributed an additional $285 million in indirect output and more than 2,000 jobs, reflecting the communications and administrative mail flows that accompany distribution operations.

Professional services round out the indirect economic impact picture. Legal services contributed $345 million, reflecting the regulatory complexity of distributing tobacco, nicotine products, and other controlled categories. Accounting, tax preparation, bookkeeping, and payroll services added $311 million and nearly 1,920 jobs. Advertising, public relations, and related services generated $354 million as distributors invest in marketing support, trade promotions, and brand-building activities on behalf of their manufacturer partners and retail customers.

Utilities contributed $497 million in indirect output, reflecting the energy costs of operating large warehouse facilities, refrigeration systems, and fleet charging infrastructure. As distributors expand cold-chain capabilities and invest in energy efficiency, utility spending will remain a significant component of the sector's upstream economic footprint.

Taken together, these supplier relationships underscore the breadth of industries that benefit when convenience distribution companies invest and expand. From financial services to logistics, and from technology to real estate, indirect impacts reveal the sector's extensive economic reach and its role in sustaining hundreds of thousands of jobs across the broader U.S. economy.

INDUCED IMPACTS

Induced impacts occur when workers employed directly in convenience distribution and indirectly in its supply chains spend their wages in the broader economy. In 2024, this household spending generated $18.6 billion in output and supported 82,496 jobs. These effects demonstrate how the paychecks earned in the distribution industry and its supplier network

ripple outward to sustain demand for housing, healthcare, retail, dining, and other everyday services. The induced channel is where the economic impact of convenience distribution becomes most visible at the community level, showing up in the restaurants where workers eat, the doctors' offices where their families receive care, and the schools where their children learn.

Real estate is the single largest category of induced output, contributing $2.59 billion, nearly 14% of all induced effects. This reflects how wages from distribution jobs translate into mortgage payments, rent, and property-related spending that stabilize communities. Housing is the foundation of household wealth and neighborhood stability, and the real estate activity supported by convenience distribution wages reinforces property values, supports construction and maintenance trades, and generates the property tax revenues that fund local schools and public services.

Healthcare is another major channel and the largest source of induced employment. Healthcare and social assistance generated $2.37 billion in induced output and 15,925 jobs, representing 19.3% of total induced employment. Nearly one in five induced jobs is in healthcare, from hospitals and physician offices to home health aides and social workers. These expenditures reflect the healthcare needs of a large, geographically dispersed workforce and their families. In many of the smaller communities where distributors operate, the healthcare spending supported by distribution wages represents a meaningful share of local demand for medical services.

Financial intermediation and investment services generated $1.38 billion in induced output and 5,043 jobs as workers saved, invested, and managed risk through banking and investment channels. Insurance carriers and related activities added another $713 million and 1,662 positions. Together, financial and insurance services account for $2.09 billion in induced output, reflecting how the sector's wages flow into retirement accounts, insurance premiums, mortgage servicing, and consumer credit, sustaining the financial services infrastructure that communities depend on.

TABLE 4. INDUCED OUTPUT BY INDUSTRY

NAICS	INDUSTRY	INDUCED OUTPUT (MILLIONS $)	% SHARE
531	Real Estate	$2,594.9	13.9%
65	Health Care and Social Assistance	$2,370.4	12.7%
521-523, 525	Financial Intermediation and Investment Services	$1,377.5	7.4%
44-45	Retail	$1,335.9	7.2%
72	Accommodation and Food Services	$1,169.6	6.3%
524	Insurance Carriers and Related Activities	$713.2	3.8%
48	Transportation	$552.6	3.0%
56	Administrative, Employment, and Support Services	$534.4	2.9%
221	Utilities	$395.4	2.1%
518-519	Cloud, Data, and Information Services	$368.3	2.0%
55	Management of Companies and Enterprises	$304.9	1.6%
513	Publishing Industries	$285.6	1.5%
811	Repair and Maintenance	$284.4	1.5%
324110	Petroleum Refineries	$238.5	1.3%
5411	Legal Services	$213.5	1.1%
	All Other Industries	$5,897.1	31.6%
	Total Induced Output	**$18,636.3**	**100%**

Source: Author calculations based on IMPLAN model

TABLE 5. INDUCED EMPLOYMENT BY INDUSTRY

NAICS	INDUSTRY	INDUCED EMPLOYMENT (PERSONS)	% SHARE
65	Health Care and Social Assistance	15,925	19.3%
44-45	Retail	10,460	12.7%
72	Accommodation and Food Services	9,827	11.9%
521-523, 525	Financial Intermediation and Investment Services	5,043	6.1%
56	Administrative, Employment, and Support Services	4,202	5.1%
531	Real Estate	3,534	4.3%
48	Transportation	2,486	3.0%
61	Educational Services	2,468	3.0%
813110	Religious Organizations	1,885	2.3%
811	Repair and Maintenance	1,772	2.1%
524	Insurance Carriers and Related Activities	1,662	2.0%
812111-812199	Personal care services	1,349	1.6%
55	Management of Companies and Enterprises	1,104	1.3%
492	Couriers and Express Delivery Services	913	1.1%
	All Other Industries	19,866	24.1%
	Total Induced Employment	**82,496**	**100%**

Source: Author calculations based on IMPLAN model

Retail activity absorbed $1.34 billion in induced output and supported 10,460 jobs, the second largest source of induced employment at 12.7% of the total. Workers and their families spend at grocery stores, general merchandise retailers, auto parts dealers, and specialty shops, supporting the retail jobs that anchor shopping districts and commercial corridors in communities of every size. Accommodation and food services added $1.17 billion in induced output and 9,827 positions. Together, these consumer-facing sectors account for nearly a quarter of all induced employment, showing how household consumption drives local service economies. When distribution workers take their families to dinner, stop for coffee on the way to work, or check into a hotel during a weekend trip, they are sustaining the hospitality businesses and service jobs that define the character of their communities.

Administrative, employment, and support services contributed $534 million and 4,202 jobs in induced effects, while transportation added $553 million and 2,486 positions. These figures reflect the secondary demand for logistics, staffing, and business support services created as induced spending circulates through the economy.

Educational services supported 2,468 induced positions, reflecting workers' investments in their children's schooling and their own continuing education. Religious organizations sustained 1,885 jobs, personal care services added 1,349 positions, and repair and maintenance services contributed $284 million in output and 1,772 jobs. These categories illustrate the full breadth of community life that benefits from the wages earned in and around the convenience distribution industry. Every paycheck spent on a haircut, a car repair, a church donation, or a child's tuition reinforces the local economy and sustains the small businesses and institutions that hold communities together.

Altogether, the induced impacts highlight how convenience distribution fuels everyday life. Paychecks earned in the sector pay for homes, healthcare visits, meals out, groceries, education, and leisure. These expenditures reinforce the industry's role not just as a source of innovation in the supply chain but as a driver of stable demand in the services that households and communities depend on.

GLIDEWELL DISTRIBUTING:
Full Service in a Self-Service World

Glidewell Distributing, a family-owned wholesaler operating out of western Arkansas since 1946, has built its business on a simple premise: personal relationships still matter, especially for the independent retailers who make up the core of its customer base.

"We're a high service company," says Paula Glidewell, who has spent her entire life around the business her parents started nearly 80 years ago, along with her brother Jim Glidewell. Glidewell's salespeople still walk into stores every week, checking shelves, flagging out-of-date products, and introducing new items. The delivery drivers do more than drop boxes; they are a familiar face on a familiar route. It is a deliberate, hands-on model, and for Glidewell's customer base, it works. Glidewell puts the economic logic plainly: a locally owned wholesaler keeps both sides of the transaction inside the regional economy, supporting not just its own employees but the local reps, brokers, and small manufacturers who call on it every week.

The company employs roughly 55 people, operates a fleet of about 20 delivery trucks, and distributes across Arkansas and into neighboring states from a single warehouse. Employees tend to stay at Glidewell. Average tenure is about ten years, and the reason is partly that workers can see where the job leads. There is opportunity for warehouse hands to become drivers, and for drivers to become salespeople. For the last ten years, every new salesperson at Glidewell started somewhere else in the building.

Four Generations & Counting

Glidewell's roots stretch back further than 1946. The family acquired a company that had been in business since 1917, giving the operation more than a century of continuous presence in the region. A fourth generation of family leadership is already learning the trade and preparing the business for the future.

The business has already reinvented itself more than once. Over the decades, the company has sold paint, wine, alcohol, and just about anything else that made sense for the market. The current catalog runs heavy on tobacco, candy, snacks, and heat-and-serve prepared foods that suit the older, smaller-format stores in the region. The willingness to pivot has kept the company alive through shifts that closed many of its peers.

Buying Gas from Bob

One of the quieter ways Glidewell supports its local economy and its retail customers is by buying from them. The company's trucks, salespeople, and staff all fuel up at local independent gas stations rather than national chains. With vehicles on the road everyday, that adds up. The company rotates where it fills up, spreading the business across its customer base. One recently retired salesman liked to say he would have walked 30 miles before buying gas from anyone but a customer.

That philosophy runs throughout the business. Glidewell has paid for radio station appearances outside customer stores, parked its branded trucks at grand openings, and used social media to direct consumers to specific independent locations carrying new products. Each of those efforts sends customers toward local retailers rather than national chains.

In a region where big-box and discount retailers dominate, Glidewell helps its customers compete by getting new and niche products onto their shelves faster than the big chains can move, sourcing from smaller manufacturers that might otherwise move slowly to retail. Many of those suppliers are local producers themselves, from regional jerky makers to small-batch specialty brands, and the relationships keep dollars circulating inside the regional economy in ways that national distribution channels rarely do.

Extended Family

Roughly 77% of Glidewell's retail customers are first- or second-generation Americans, entrepreneurs who bought into small convenience stores and built them into the backbone of their local economy. As store operations pass to the second generation, the relationships only strengthen. "It's almost like an extended family business," Glidewell says. "We treat them like family and they treat us like family." Those ties matter economically as well as personally. Every independent C-store Glidewell helps keep afloat is a storefront generating sales tax, employing a handful of workers, and anchoring a corner of a small town that might otherwise be left vacant.

For a small distributor in a region where margins stay razor-thin, eight decades of survival is itself a story of economic impact. Every year Glidewell remains in business is another year of local payroll, local supplier purchases, local retailer support, and local philanthropy.

Total Economic Impact

Convenience distribution delivers a broad and deep lift to the U.S. economy. In 2024, the sector's footprint reached across supply chains and communities, converting the daily work of moving products into jobs, income, GDP, and dependable public revenues.

Total economic output reached $65.9 billion, reflecting the combined value of all economic activity generated by the sector through its direct operations, supply chain purchases, and the household spending of its workers. That figure encompasses $28.3 billion in direct output from the distributors themselves, $18.9 billion in indirect output flowing through supplier industries, and $18.6 billion in induced output generated as workers spend their earnings in local economies. The scale of this contribution underscores a fundamental point about the convenience distribution industry: its economic value is not confined to the products on its trucks or the margins on its invoices. It radiates outward through every supplier contract, every lease payment, every insurance premium, and every paycheck that circulates through a community.

The sector's total contribution to U.S. GDP, measured as value added, reached $37.2 billion. Value added is the clearest measure of how an industry adds to national economic output, and for convenience distribution the figure reflects the wages, profits, and returns to capital generated not only within the distribution industry itself but also across the supplier industries and local economies that benefit from its activity. Direct value added of $15.4 billion was amplified by $10.8 billion in indirect effects flowing through supply chains and $11 billion in induced effects driven by household spending. The value added multiplier of 2.4 means that every dollar of GDP created directly by the sector generates an additional $1.40 elsewhere in the economy, a ratio that reflects the breadth of the industry's supply chain relationships and the spending power of its workforce.

Total labor income reached $20.2 billion, encompassing all wages, salaries, and benefits paid to workers employed directly, indirectly, and through induced effects. The sector's direct workforce of more than 72,000 earned $7.5 billion in labor income, but the ripple effects nearly tripled that figure as supplier industries and local service economies absorbed the spending power generated by distribution activity. Indirect labor income reached $6.8 billion as supply chain firms paid their own workers, and induced labor income added another $5.9 billion as those combined earnings flowed into household budgets across the country. These earnings sustain mortgages, grocery bills, tuition payments, healthcare expenses, and retirement savings, reinforcing household economic security in every region where distributors operate. The labor income multiplier of 2.7 means that each dollar of wages paid directly in the sector generates $1.70 more in earnings across the broader economy, a powerful indicator of the industry's role in supporting middle-income opportunity at scale.

Tax payments totaled $8.6 billion to federal, state, and local governments. Federal contributions accounted for $5 billion, state-level payments reached nearly $2 billion, and county and local jurisdictions collected the remaining $1.6 billion. These revenues fund the public infrastructure, education systems, emergency services, and community programs that Americans depend on. The sector's fiscal contribution is especially significant because it is geographically dispersed, reaching not just major metropolitan areas but also the smaller cities and rural communities where convenience distribution operations

TABLE 6. TOTAL ECONOMIC IMPACTS OF CONVENIENCE STORE DISTRIBUTION SECTOR

IMPACT	EMPLOYMENT (PERSONS)	LABOR INCOME (MILLIONS $)	VALUE ADDED (MILLIONS $)	OUTPUT (MILLIONS $)
Direct Impact	72,349	$7,517.1	$15,434.8	$28,317.5
Indirect Impact	82,313	$6,778.2	$10,757.0	$18,949.4
Induced Impact	82,496	$5,877.1	$11,027.6	$18,636.3
Total Economic Impact	**237,159**	**$20,172.4**	**$37,219.3**	**$65,903.1**

Source: Author calculations based on IMPLAN model

are concentrated. Roads, bridges, schools, and fire departments in these communities benefit directly from the tax revenues that the sector generates.

Total employment reached 237,159 jobs, spanning direct warehouse and delivery operations, supplier industries, and the community services sustained by household spending. The sector's employment multiplier of 3.3 means that every direct position generates more than two additional jobs elsewhere in the economy. Those jobs are not concentrated in a single occupation or skill level. They range from warehouse associates and truck drivers to accountants, insurance agents, healthcare workers, teachers, and restaurant staff, reflecting the breadth of industries that benefit when convenience distribution thrives. In practical terms, for every warehouse worker picking orders before dawn, there are two more people employed somewhere in the economy whose jobs exist, in part, because of the economic activity that distributors set in motion.

These results show how convenience distribution serves as a reliable engine of economic activity. The industry does more than move products. It anchors stable jobs in communities of every size, deepens supply chain relationships across dozens of industries, and generates the tax revenues that fund public goods. The sector's workers are embedded in the fabric of local economies, spending their wages on housing, healthcare, education, and daily necessities. Their economic contributions compound with each paycheck, reinforcing the industry's role not just as a source of products but as a driver of stable demand in the services that households and communities depend on.

Multiplier Effects

The convenience distribution sector's impact extends well beyond its direct footprint. Every dollar spent within the industry generates additional activity in supplier industries and in household spending, magnifying the total contribution to the U.S. economy. This relationship is captured through multipliers, which compare the combined direct, indirect, and induced effects to the direct impacts alone. Multipliers are among the most useful tools in economic impact analysis because they reveal the degree to which an industry is connected to the broader economy. An industry with weak supply chain linkages and low wages will produce modest multipliers. An industry with deep supplier relationships, a large workforce, and wages that circulate through local communities will produce strong ones. The convenience distribution sector falls firmly in the latter category.

In 2024, the sector's output multiplier was 2.3, meaning that for every $1.00 of direct output generated by convenience distributors, an additional $1.30 of activity was created elsewhere in the economy. That spillover appears first in domestic supply chains, including transportation, warehousing, insurance, real estate, professional services, and energy, and then in downstream spending by employees and suppliers' employees on housing, healthcare, retail, and dining. The output multiplier reflects both the complexity of the sector's purchasing patterns and the geographic breadth of its operations. Distributors do not source from a narrow set of suppliers. They purchase from thousands of vendors across dozens of industries, spreading economic activity widely through the national economy.

The value added multiplier of 2.4 highlights how strongly the sector contributes to U.S. GDP beyond its own operations. Every $1.00 of GDP generated directly by convenience distribution firms created an additional $1.40 elsewhere in the economy. This nearly one-and-a-half-for-one effect reflects the sector's ability to stimulate value creation across diverse industries, from the professional services firms that advise distributors to the healthcare providers and retailers that serve their workers.

The labor income multiplier of 2.7 shows that each $1.00 of wages paid directly in the sector generated an additional $1.70 in earnings throughout supplier industries and household spending. This is a particularly meaningful multiplier because it measures the extent to which an industry's payroll supports income for workers beyond its own walls. For convenience distribution, the strong labor income multiplier reflects both the breadth of its supply chain, which employs workers in logistics, financial services, technology, and professional services, and the spending patterns of a workforce that is geographically dispersed and deeply embedded in local economies.

The employment multiplier of 3.3 is the most striking figure in the table and among the strongest of any wholesale industry. It means that every one direct job in convenience distribution supports more than two additional jobs across the wider economy. This ratio reflects the labor-intensive nature of the sector's supply chain, particularly in logistics, staffing services, and courier operations, as well as the induced employment generated when more than 237,000 total workers spend their earnings on healthcare, food services, retail, education, and personal services. The employment multiplier is a measure of how deeply an industry is woven into the economic life of the communities it serves, and at 3.3, convenience distribution ranks as one of the most employment-generative sectors in the American economy.

Taken together, these multiplier effects demonstrate the unique role of convenience distribution as an economic engine. The industry not only moves the products that stock America's convenience stores but also sets off ripple effects that spread jobs, income, and tax revenue across nearly every other sector of the economy. Strong multipliers are not automatic. They are the result of deep supply chain integration, a large and well-compensated workforce, broad geographic reach, and the kind of sustained community-level spending that comes from stable, year-round employment. The convenience distribution sector delivers on all four counts.

TABLE 7. ECONOMIC MULTIPLIERS

	ECONOMIC MULTIPLIER
Output	2.3
Value Added (Contribution to GDP)	2.4
Labor Income	2.7
Employment	3.3

Source: Author calculations based on IMPLAN model

GROCERY SUPPLY COMPANY:
The Biggest Company in a Small Town

Drive into Sulphur Springs, Texas, about 80 miles east of Dallas, and you will see the trucks before you see the town. Grocery Supply Company (GSC) rigs log millions of miles a year across 23 states, and around here the fleet is as recognizable as the water tower.

Founded in 1947 and still owned by the third generation of the McKenzie family, GSC employs just under a thousand people across five operating divisions, with warehouses in Sulphur Springs and Brenham, Texas, and in Meridian, Mississippi. More than 600 of those employees work in Sulphur Springs itself, making the company the largest private employer in town. From those facilities, it moves over 10,000 SKUs to thousands of convenience stores.

The Economics of Single Pick

A typical c-store has a small footprint, high turnover, and perishable inventory. It can't afford to buy a master case of candy bars when it only needs 18-24 bars, and it cannot negotiate directly with large manufacturers at meaningful scale. GSC closes that gap, buying in bulk, warehousing the inventory, and shipping it back out in exactly the quantities each store needs. The model is called single-pick, and it is the reason an independent retailer in rural areas can stock the same breadth of product as a large regional chain.

Source: Grocery Supply Company

What looks like a logistics solution is really the economic foundation that keeps independent ownership viable in the convenience channel. Thousands of small businesses across the country exist as going concerns because a distributor is willing to break cases down to the unit, deliver on a tight cadence, and absorb the complexity of managing 10,000-plus SKUs on their behalf. Without that capability, most independents could not hold enough assortment to compete, could not turn inventory fast enough to stay solvent, and would either consolidate into chains or close outright. Each of those stores is itself a small employer, a local tax contributor, and often the only retail option in the community it serves. Wholesale distribution is what keeps that layer of the economy intact.

Wages that Move with the Work

Like many convenience distributors, GSC's pay structure is directly tied to output rather than relying on flat hourly rates. Selectors are compensated based on the volume, speed, and accuracy of the orders they pick, while drivers earn against a combination of miles driven, stops made, and weight unloaded. On a busy summer day, a single driver may move 50,000 pounds of product by hand. Josh Hood, Director of HR and Employee Engagement, notes it's not unusual for the fastest and most efficient warehouse selectors to earn an hourly wage well above prevailing regional wages. "Our pay and incentive structures are very granular to reward them for what they're actually doing," he says, "and not just put them in a big generic box."

That model has economic consequences that extend well beyond the warehouse floor. Convenience distribution jobs in this mold pay above-market wages for workers without four-year degrees, channeling earnings into local economies that often have few comparable employers. They also produce unusually stable workforces. Average tenure at GSC sits around eight years, and 40-year anniversaries are routine. In an industry where warehouse and transportation turnover regularly runs above 50 percent annually, that retention compounds into lower recruiting costs, deeper institutional knowledge, and household stability across generations of families in the communities these distributors call home.

The Anchor Effect

Just under 1,000 local paychecks support grocery stores, restaurants, schools, and small businesses throughout the communities where GSC operates. Across the street from GSC's headquarters in Sulphur Springs, TX, sits a soccer and baseball complex GSC helped fund for the city. For more than 30 years, the company has run an annual charity golf tournament, with proceeds totaling millions that go entirely to local organizations.

"It's not for marketing," Hood notes. "This is our town, this is our community, and this is our school system."

Convenience Distribution Sector Wages

The average annual compensation across convenience distribution occupations was approximately $103,900 in 2024, calculated as total direct labor income of $7.5 billion divided by 72,349 direct employees. That figure is roughly 33% above the national average of approximately $78,000, placing convenience distribution well ahead of many industries that employ workers with similar educational backgrounds and skill profiles. This wage premium reflects the specialized skills required to operate complex distribution networks, including commercial driving credentials, inventory management expertise, regulatory compliance knowledge, and the customer relationship skills that connect manufacturers to retailers.

The wage picture extends well beyond direct employees. Workers in supplier industries supported by convenience distribution earned an average of approximately $82,300, calculated from nearly $6.8 billion in indirect labor income across 82,313 jobs. These are positions in transportation, financial services, real estate, professional consulting, insurance, and technology, industries that provide the inputs distributors need to operate. Induced employment, the jobs sustained by household spending across the full workforce, averaged approximately $71,300 per worker from nearly $5.9 billion in labor income across 82,496 positions. These induced jobs span healthcare, retail, food services, education, and personal services, reflecting the community-level occupations that benefit when distribution wages circulate through local economies.

Across all 237,159 jobs supported by the sector, the average compensation was approximately $85,100. That figure blends highly compensated direct positions with the broader mix of supplier and community-level employment. The fact that the overall average remains well above the national average even after including induced service-sector jobs underscores the quality of employment that the convenience distribution ecosystem generates. This is not an industry that supports low-wage work at the margins. It is a sector whose wages, at every level of the supply chain and in every community it touches, contribute meaningfully to household economic security.

TEAM SLEDD:
From $3 Million to $650 Million, One Relationship at a Time

Team Sledd was founded in 1937 in Wheeling, West Virginia. What started as a small family business with a few dozen employees and a delivery radius of about 30 miles has grown into a business that distributes approximately $650 million in product annually across seven states and employs 260 people across functions that span warehousing, transportation, sales, store development, merchandising, food service, accounting, and media. Team Sledd has grown into one of the most visible economic anchors in the Ohio Valley.

Flipping the Model

One of the turning points in Team Sledd's evolution came from an unlikely source: a supply-and-demand presentation in Chicago that Team Sledd President Robert Sincavich expected to be dry and boring. The speaker delivered a message that rewired how the company's leadership thought about the business. The shift put Team Sledd on the same side of the table as the independent retailers it served, many of whom were competing against vertically integrated chains. The pitch was simple: if we do not operate as a team, neither one of us is going to be successful in the long run. Independent convenience stores are often the last remaining retail presence in small Appalachian towns, and their survival depends on having a distribution partner willing to function as more than a delivery service. By aligning itself with retailers, Team Sledd helps keep hundreds of independently owned stores viable.

Rather than functioning as an order-taking wholesaler, the company acts as a de facto vertically integrated partner for small and mid-sized convenience stores that would otherwise lack the resources to compete with large chains. When a new customer comes on board, whether a conversion from a competitor or a greenfield site, Team Sledd's store development team visits the location and produces a full AutoCAD blueprint covering kitchen layout, shelving configuration, product placement, and accommodations for direct-store-delivery products. The drawings are detailed enough to use for building permits. From there, the retail support department generates planograms, driven by industry data and store-specific point-of-sale data, and offers vendor-managed inventory programs that connect directly to the register. It is the kind of service large chains build internally with dedicated category management teams.

Source: Team Sledd

For independent operators across Appalachia, Team Sledd provides the same capability without the overhead, and every one of those stores represents local jobs, local tax revenue, and a neighborhood retail presence that might otherwise disappear.

Each store Team Sledd helps open or convert generates a cascade of local economic activity: construction and buildout work for regional contractors, ongoing employment for store staff, sales tax collections for municipal and county governments, and a daily gathering point that anchors fuel sales, foot traffic, and small purchases in communities that often have few other retail options.

The company's compensation model amplifies that local impact. Every employee, from warehouse workers and truck drivers to accounting staff, carries some form of KPI-based incentive compensation attached to their role. As the business has grown, so has the earning potential of the people who live in the communities surrounding its distribution footprint. That footprint now extends well beyond Wheeling itself, reaching across seven states that include West Virginia and its neighbors. Each delivery route represents not only product moving to convenience retailers but also wages flowing back to drivers and warehouse teams whose families live, shop, and pay taxes in the region. The structure rewards performance and reinforces the idea that every position in the organization contributes to growth.

When the Water Came to Wheeling

Convenience distributors across the country have mobilized during natural disasters, coordinating with manufacturers to donate product, running extra deliveries to overwhelmed stores, and sending supplies into affected communities. Team Sledd has done all of that, particularly in southern West Virginia, where flooding has been a recurring crisis for decades.

Beyond the immediate humanitarian response, that kind of mobilization has measurable economic value. Keeping convenience stores stocked and operating during a disaster preserves the only retail access many residents have to food, water, and basic supplies, and it keeps local employees on payroll at a moment when household finances are most fragile. Distribution networks like Team Sledd's function as a quiet form of economic infrastructure, invisible until the moment they are needed most.

In 2025, the disaster came to the company's own doorstep. A flash flood struck Valley Grove, just outside Wheeling. Hundreds of homes were damaged, and the storm killed nine people. One of the victims was a Team Sledd employee. The company threw itself into relief efforts while simultaneously dealing with its own grief.

Then the phone rang. A distributor in Kentucky, not a direct competitor but a peer in the same industry, had a charitable foundation run by a board of employees. They called to ask how they could help Team Sledd's affected workers.

"To me, it is just evidence that there's so much good in our industry," Sincavich says. "It's not just us. There's a tremendous impact across the whole spectrum of distributors like us that do a lot of good things in the community."

That instinct to show up, for customers, for employees, for neighbors, is what carried a 20-person operation in the hills of West Virginia to a seven-state, $650 million enterprise. The company was built on a principle so straightforward its leader almost apologizes for how simple it sounds: take the call, sweat the details, follow up, follow through. "It's not rocket science. It's just good old-fashioned work."

State-Level Impacts

While convenience distribution has a powerful national footprint, its impact is also deeply felt at the state level. The industry contributes to individual state economies through the jobs, income, and output generated within each state's borders. As in the national analysis, the effects are categorized as direct, indirect, and induced. However, for clarity and ease of comparison, the charts presented here combine indirect and induced impacts into a single figure. Together, these measures provide a clearer picture of how convenience distribution supports regional economic ecosystems across the country.

Because state-level IMPLAN models capture only the economic activity that remains within each state's borders, the sum of all state-level impacts is lower than the national total. Cross-state supply chain purchases and household spending that benefit other states are not reflected in any single state's results. Direct employment matches the national figure of 72,349 jobs, since every direct job is located in a specific state. However, total state-level employment sums to approximately 181,600 compared to 237,200 at the national level, and total state-level output sums to $50.3 billion compared to $65.9 billion nationally. The difference represents economic activity that crosses state lines, a feature of nationally integrated supply chains that is expected in any state-level decomposition.

ECONOMIC OUTPUT

Convenience distribution drives significant economic activity across all 50 states, contributing a total of $50.3 billion in output at the state level. This figure includes $28.3 billion in direct output from distributors, with an additional $22.0 billion generated through upstream suppliers and household spending. This widespread activity highlights the central role of distribution in regional economic ecosystems.

California leads the nation by a substantial margin, with total output from convenience distribution reaching $6.9 billion. This includes $3.8 billion in direct output and reflects the state's position as the largest consumer market in the country and a hub for wholesale distribution operations. California alone accounts for nearly 14% of national sector output at the state level.

Texas ranks second, generating $4.7 billion in total output, supported by the state's central location and expansive distribution infrastructure. Florida follows with $3.9 billion, New York with $3.4 billion, and Illinois with $3.0 billion. Together, these five states account for approximately 44% of total state-level output, reflecting the concentration of population, retail activity, and distribution infrastructure in the nation's largest state economies.

Other major contributors include New Jersey ($2.4 billion), Ohio ($1.7 billion), Georgia ($1.5 billion), North Carolina ($1.5 billion), and Pennsylvania ($1.5 billion). Each of these states hosts significant distribution capacity across warehousing, transportation, and retail supply chains. Beyond the top states, mid-sized economies such as Michigan, Washington, Massachusetts, Tennessee, and Minnesota demonstrate strong output ranging from $1.0 billion to $1.2 billion, reflecting balanced contributions across wholesale distribution, logistics, and consumer services.

EMPLOYMENT

Convenience distribution is a national economic engine with a strong regional presence, and its impact is especially concentrated in a core group of states. The five leading states account for approximately 42% of all direct convenience distribution jobs and 42.5% of total employment supported by the sector nationwide. The top ten states represent nearly 58% of direct jobs and 60% of total employment.

California stands out as the clear leader, accounting for 13% of the nation's direct convenience distribution employment. With 9,525 direct jobs, the state plays a pivotal role in the sector. When indirect and induced effects are included, California's total employment impact from convenience distribution reaches 23,441 jobs, underscoring the depth of its industry ecosystem in logistics, financial services, technology, and professional services.

Texas is the second-largest hub, with 6,312 direct jobs and a total of 16,931 jobs supported statewide. The state's strength is driven by its central geographic position, extensive highway infrastructure, and large population base, all of which make it a natural hub for distribution operations serving the southern and central United States. Florida follows closely with 5,404 direct jobs and 15,217 total positions, reflecting its large consumer market and the density of its convenience retail network.

Other high-impact states include New York and Illinois, with 4,922 and 3,888 direct jobs respectively, and total employment impacts of 11,372 and 10,173. These states host major wholesale distribution infrastructure and benefit from deep supplier networks in financial services, transportation, and professional consulting.

Smaller states also make significant contributions. New Jersey supports more than 8,000 total jobs, reflecting its role as a logistics corridor for the densely populated Northeast. Ohio, Georgia, North Carolina, and Pennsylvania each support between 5,300 and 6,500 total jobs, representing a mix of large consumer markets and distribution hub economies. Michigan, Washington, Tennessee, Minnesota, and Wisconsin each support between 3,700 and 4,500 total positions.

Even states with relatively modest direct employment still experience meaningful economic impact through extended supply chains and household spending. Eighteen states support between 1,000 and 3,000 total jobs, including Maryland, Indiana, Virginia, Oregon, Kentucky, Iowa, South Carolina, Louisiana, Alabama, Utah, Connecticut, Arkansas, Oklahoma, Kansas, Nevada, Nebraska, Idaho, and Mississippi. Overall, convenience distribution supports jobs in all 50 states and the District of Columbia, reinforcing the sector's role as one of the most geographically balanced industries in the American economy.

LABOR INCOME

In addition to generating employment, the convenience distribution sector is a major source of well-paying jobs across the United States. In total, the sector supports $15.4 billion in labor income at the state level, reflecting its role in powering household earnings and consumer spending in regional economies.

California again leads all states with $2.2 billion in total labor income tied to convenience distribution. Of this, $993 million comes from direct wages paid by distribution firms, while the remainder is supported through supplier activity and household spending. This figure accounts for nearly 14% of all direct labor income in the sector nationwide, underscoring California's outsized role in high-value distribution operations.

Texas ranks second with $1.4 billion in total labor income, followed by Florida at $1.2 billion, New York at $1.1 billion, and Illinois at $941 million. These states benefit not only from large employment bases but also from the presence of major distribution centers, extensive logistics infrastructure, and deep supplier ecosystems that generate additional wages throughout the economy.

States like New Jersey, Ohio, North Carolina, Pennsylvania, and Georgia also report strong figures, each supporting between $436 million and $804 million in total labor income. These regions are home to significant distribution clusters with strong supplier networks and well-established labor markets.

Even smaller states demonstrate the far-reaching income impact of the industry. Colorado and Washington each support over $390 million in labor income, while states such as Minnesota, Tennessee, and Missouri all surpass $325 million. These figures show how the convenience distribution sector distributes income broadly across the country, including

in both urban centers and regional distribution hubs.

VALUE ADDED

Convenience distribution remains a meaningful contributor to GDP across the country, generating more than $28.8 billion in value added at the state level. This total represents the sector's direct contribution to state economies through wages, profits, and returns to capital, plus the additional GDP created through supplier activity and household spending. While the sector's share of GDP varies by state, its contributions are present in every state economy and are especially significant in states with large consumer markets and established distribution infrastructure.

California leads the nation in both absolute and relative terms, generating $4.1 billion in total value added from convenience distribution. Of this, $2.1 billion comes from direct activity within distribution firms, while the remainder flows through supply chains and household spending. This figure reflects the state's dominant position in wholesale trade, its deep supplier ecosystem, and the purchasing power of its large workforce.

Texas ranks second with $2.7 billion in total value added, followed by Florida at $2.2 billion, New York at $2.0 billion, and Illinois at $1.8 billion. These five states together account for approximately 44% of all state-level value added, consistent with their shares of employment and output. Each benefits from a combination of large population bases, extensive retail networks, and the concentration of financial, professional, and logistics services that amplify the sector's GDP contribution beyond its direct operations.

New Jersey contributes $1.4 billion in value added, reflecting its strategic position as a distribution and logistics corridor serving the Northeast. Ohio, Georgia, Pennsylvania, and North Carolina each generate between $821 million and $949 million, driven by balanced contributions across direct distribution activity and the supplier and household spending effects that flow from it.

Mid-sized states also make substantial contributions to GDP through the sector's activity. Colorado, Washington, Massachusetts, and Minnesota each support between $527 million and $709 million in total value added, while Michigan, Tennessee, and Missouri contribute between $500 million and $633 million. These figures demonstrate that the sector's GDP contribution is not limited to the largest state economies but extends into a broad set of regional markets where distribution operations, supplier networks, and worker spending combine to generate meaningful economic value.

Even states with smaller distribution footprints contribute to the national picture. Connecticut generates $313 million in value added, Utah $259 million, and Arkansas $259 million. At the lower end, states like Wyoming, Alaska, Vermont, and the District of Columbia each contribute between $29 million and $87 million, reflecting the sector's presence in even the smallest state economies. In every case, the value added figures confirm that convenience distribution creates GDP not just where products are warehoused and delivered but also in the communities where suppliers operate and workers spend their earnings.

TAX REVENUE

The convenience distribution sector generates meaningful tax revenue for state and local governments across the country. At the state level, total tax contributions reach $6.7 billion, supporting public infrastructure, education, healthcare, and essential government services in communities where distributors operate.

California leads with $1.1 billion in total tax revenue from the sector's activity, more than twice the amount of any other state. New York follows at $528 million, Florida at $521 million, Texas at $487 million, and Illinois at $414 million. These five states alone account for 46% of all state-level tax contributions, reflecting both the scale of distribution operations and the tax structures in these large-economy states.

New Jersey generates $375 million in tax revenue, while Ohio, Georgia, Pennsylvania, and North Carolina each contribute between $183 million and $204 million. Even mid-sized states contribute meaningfully: Washington generates $173 million, Colorado $110 million, Arizona $106 million, and Missouri $103 million in tax revenue from the sector's direct, indirect, and induced effects.

These tax contributions are especially significant because they are geographically dispersed. Unlike industries that concentrate their fiscal footprint in a few major metropolitan areas, convenience distribution generates tax revenue in communities of every size. Distribution centers are located in suburban industrial parks, small cities, and rural areas. Delivery routes reach into every county in the country. The workers who drive those routes, pick those orders, and manage those operations live in the communities they serve. As a result, the tax revenues generated by the sector flow into the local governments, school districts, and special service districts that are closest to the people who depend on them.

Taken together, the state-level analysis confirms that the convenience distribution sector is not only a national economic force but also a vital contributor to individual state economies across the country. Its jobs, output, and tax revenues strengthen the fiscal and economic foundations of communities in every region, reinforcing the sector's role as one of the most geographically balanced and broadly beneficial industries in the American economy.

Conclusion

The convenience distribution sector is one of the most broadly beneficial and least visible industries in the American economy. It operates behind the scenes, connecting manufacturers to more than 150,000 convenience stores, gas stations, and small retailers in every state, ensuring that consumers find the products they need within minutes of where they live. The economic impact analysis reveals the true scale of that contribution.

The numbers are substantial. The sector supports 237,159 American jobs, generates $65.9 billion in total economic output, contributes $37.2 billion to U.S. GDP, and produces $8.6 billion in tax revenue for federal, state, and local governments. Its employment multiplier of 3.3 ranks among the strongest of any wholesale industry, meaning that every direct job in convenience distribution supports more than two additional positions across the wider economy. Its wages exceed the national average by 33%, and its fiscal contributions reach communities of every size in every region of the country.

But the most important finding is not any single number. It is the breadth and depth of the sector's integration with the broader economy. Convenience distribution does not operate in isolation. It activates a vast network of supplier industries, from transportation and warehousing to financial services, real estate, insurance, and technology. It sustains household spending that flows into healthcare, restaurants, retail, education, and personal services. It generates tax revenues that fund schools, roads, fire departments, and public infrastructure in thousands of communities. And it does all of this while providing stable, well-paying employment to workers who do not need a four-year degree to build a career.

The state-level results reinforce the national picture. Convenience distribution supports jobs and generates economic activity in all 50 states and the District of Columbia. California, Texas, Florida, New York, and Illinois lead in total employment and output, but the sector's impact extends far beyond these large-economy states. Thirty-six states have more than 500 direct distribution employees, and every state benefits from the indirect and induced effects that flow from the sector's operations. This geographic breadth is not incidental. It is a defining characteristic of an industry whose workforce, delivery routes, and customer relationships mirror the geography of American retail.

The sector has grown meaningfully over the past decade. These gains occurred while the convenience retail channel itself was expanding, with more stores, more product categories, and greater demand for the foodservice, data analytics, and compliance services that modern distributors provide. The number of convenience stores in the United States has grown, single-store operators have proliferated, and the range of products flowing through the convenience channel has broadened considerably. Each of these trends has increased the volume of wholesale activity attributable to convenience distribution.

The policy implications are clear. Convenience distribution depends on infrastructure, workforce availability, and regulatory clarity. Well-maintained roads and bridges keep delivery fleets moving. Access to skilled warehouse workers and commercial drivers keeps operations running. Rational regulatory frameworks, particularly around tobacco, nicotine products, and emerging product categories, allow distributors to fulfill their compliance obligations without unnecessary cost or complexity. And policies that recognize the essential role of wholesale distribution in the supply chain help ensure that the sector can continue to invest, grow, and create jobs.

The men and women who work in convenience distribution do not build software or design semiconductors. They pick orders, drive trucks, manage inventory, build relationships with store owners, and ensure that the products Americans rely on every day are available when and where they are needed. Their work is physical, operational, and essential. And the economic value extends far beyond what meets the eye, reaching into supplier industries, local service economies, and public revenues in every corner of the country.

Convenience distribution is a foundational part of the American economy, and its continued strength is vital to the communities, workers, and small businesses that depend on it.

HARDEC'S:
Three Generations Deep in Elizabethtown

When Mr. Hartlage and his partner Mr. Decker bought the Baxter Candy Company in 1956, they combined the first letters of their surnames and called it Hardec's. Nearly seven decades later, the Hartlage family still owns and operates the business from Elizabethtown, Kentucky, about 40 miles south of Louisville. Hardec's employs roughly 50 people, with another 100 working in the family's 17 tobacco retail stores, making the Hartlage enterprises one of the more meaningful private employers in Hardin County and a steady contributor to the local wage base.

Ross Haynes, the company's vice president and the only non-family member to lead a Hartlage enterprise, came aboard in 2020 after more than two decades in the tobacco industry. He had been a vendor calling on Hardec's for years, and he and his wife had owned two tobacco stores the Hartlages acquired around the same time. "I've been a customer, a vendor, and now an employee," he says.

Funding Government Before the First Sale

One of the least understood aspects of convenience distribution is the role these companies play in state tax collection. Few businesses move as much money to state treasuries, as early, as a convenience distributor. Hardec's purchases millions of dollars in tobacco excise tax stamps from Kentucky, Indiana, and Ohio, prepaying the tax before a single pack reaches a store shelf. A specialized machine opens each carton, irons a stamp onto every pack, then reseals it. At any given time, Hardec's sits on millions of dollars in prepaid tax inventory. That capital reaches state coffers long before a consumer ever pays at the register, and cigarette manufacturers add a second layer by requiring payment before delivery. The result is a working capital subsidy flowing from private distributors to both state governments and major manufacturers, a financing burden the public balance sheet never has to carry. Multiplied across the industry, the dollar value of this early remittance runs into the billions annually.

Anchored in the Local Economy

Hardec's footprint in Hardin County extends well beyond its warehouse walls. Its 15 trucks and vans are fueled and serviced locally, generating recurring revenue for area fuel suppliers, mechanics, and towing operators. Vendors stay in area hotels. The company's annual trade show, held each year, draws manufacturers and retailers to Elizabethtown for a golf outing, bourbon tour, and product expo, producing a concentrated burst of spillover spending across local lodging, restaurants, and venues over several days. Payroll circulates through the community, supporting five office staff, six managers, 13 to 15 drivers, and roughly 26 warehouse employees, with salaries that meaningfully lift household spending power in a community of Elizabethtown's size. Hardec's also pays the full cost of a subscription clinic for every employee, delivering primary care and prescriptions at cost and reducing household healthcare burdens that would otherwise drag on local disposable income.

Growing People, Not Just Moving Product

Tenure at Hardec's runs deep. The receiving clerk has been there more than 30 years, the warehouse manager 15 to 20. That stability is itself an economic asset. Long tenure means lower turnover costs, deeper institutional knowledge, and a workforce whose earnings stay rooted in Hardin County year after year. Haynes has reinforced the pattern by promoting from within whenever possible. Helping employees to grow earnings, buy homes, ultimately anchor themselves in the community. Each move represents a household retained inside the local tax base rather than displaced from it.

APPENDIX A:
Expanded Methodology & Definitions

The convenience distribution sector spans a set of interconnected wholesale trade industries that procure, warehouse, and deliver products to convenience stores, gas stations, and other small-format retailers. For this analysis, the sector is defined using IMPLAN wholesale trade sectors that together capture the primary activities of convenience distributors.

INPUT-OUTPUT FRAMEWORK

To quantify the sector's total economic contribution, the analysis applies input-output modeling, which traces the flow of goods, services, and income across industries. The framework captures not only the activity within the sector but also the ripple effects created throughout the broader economy. The study uses IMPLAN (2024), one of the most widely used tools for national and regional economic impact analysis. IMPLAN is employed by government agencies, academic researchers, and industry analysts to measure how spending flows through supply chains and into household consumption.

Input-output analysis is well suited to the convenience distribution sector because it reflects the industry's extensive supply chains, moderate wages spread across a large workforce, and broad geographic footprint. It provides a comprehensive view of how the sector's investments activate upstream suppliers and downstream spending across local communities. All results are presented in inflation-adjusted 2024 dollars.

TYPES OF ECONOMIC IMPACT

Direct impacts represent employment, labor income, value added, and output occurring within the convenience distribution sector itself. This includes the jobs, wages, and production activities of wholesale distributors.

Indirect impacts result from the sector's purchases of goods and services from domestic suppliers. These supply-chain effects include jobs and output in industries providing transportation, real estate, insurance, professional services, and other inputs that enable distributors to operate.

Induced impacts reflect additional economic activity generated by household spending of employees supported by both direct and indirect activity. When these workers spend their earnings on housing, healthcare, retail, food services, and other local needs, they generate further rounds of output, income, and jobs.

MODEL ASSUMPTIONS & LIMITATIONS

Like all input-output models, IMPLAN assumes a static economic structure, relying on fixed input-output relationships across industries. The model does not incorporate dynamic adjustments such as price changes, substitution effects, productivity growth, or structural shifts in technology or consumer behavior. Results therefore represent a snapshot of annual economic activity, not a prediction of future conditions. All estimates are developed using the national IMPLAN model. Industry composition, labor markets, and supply-chain structures vary regionally, so state and local impacts may differ from national patterns.

APPENDIX B:
Projected Upstream Impacts Through 2026

This section uses data from the U.S. Census Bureau's Monthly Wholesale Trade Survey (MWTS) to provide a forward-looking estimate of how the upstream impacts of convenience distribution may evolve.

Table B-1 replicates the national impact summary, offering a baseline view of the sector's economic footprint in 2024.

TABLE B-1. CONVENIENCE DISTRIBUTION IMPACTS, 2024

IMPACT	EMPLOYMENT (PERSONS)	LABOR INCOME (MILLIONS $)	VALUE ADDED (MILLIONS $)	OUTPUT (MILLIONS $)
Direct Impact	72,349	$7,517.1	$15,434.8	$28,317.5
Indirect Impact	82,313	$6,778.2	$10,757.0	$18,949.4
Induced Impact	82,496	$5,877.1	$11,027.6	$18,636.3
Total Economic Impact	**237,159**	**$20,172.4**	**$37,219.3**	**$65,903.1**

Source: Author calculations based on IMPLAN model

To explore potential future trends, Table B-2 projects what those impacts might look like in 2026. These estimates are derived by applying the observed growth rate of wholesale trade sales in grocery and related products (NAICS 4244) and tobacco and tobacco product merchant wholesalers (NAICS 4249) between 2024 and 2026 to the 2024 impact figures. The projection assumes that supply chain structure and household spending behavior remain constant during this period.

It is important to note that these are not historical figures, nor do they reflect anticipated changes in productivity, labor dynamics, regulatory conditions, or shifts in retail channel composition. Instead, they serve as a conservative approximation of how the sector's economic footprint might scale if recent growth patterns continue.

These rough estimates offer a useful lens for understanding potential trends and reinforcing the sector's growing relevance to the broader economy.

TABLE B-2. U.S. CONVENIENCE DISTRIBUTION IMPACTS, 2026 (ESTIMATED)

IMPACT	EMPLOYMENT (PERSONS)	LABOR INCOME (MILLIONS $)	VALUE ADDED (MILLIONS $)	OUTPUT (MILLIONS $)
Direct	79,941	$8,306	$17,054	$31,289
Indirect	90,950	$7,489	$11,886	$20,938
Induced	91,152	$6,494	$12,185	$20,592
Total	**262,043**	**$22,289**	**$41,125**	**$72,818**

Source: Author calculations based on IMPLAN model

APPENDIX C:

Shifts in Industry Employment & Output, 2019-2024

The economic footprint of the convenience distribution sector has expanded significantly over the past decade, reflecting both the growing importance of the convenience retail channel and the increasing sophistication of the distribution operations that support it. By comparing the current 2024 results with estimates produced using the same methodology for 2019 and 2014, a clear trajectory of growth emerges across every major economic indicator.

Total economic output grew from $40.6 billion in 2014 to $59.5 billion in 2019 and $65.9 billion in 2024, an increase of 62% over the full decade. Direct output, which measures the economic value of the distribution service itself, rose from $16.6 billion to $24.5 billion to $28.3 billion over the same period, a gain of 70%. These increases reflect both the expansion of the convenience retail channel and the rising value of the services that distributors provide, including foodservice support, data analytics, compliance management, and last-mile delivery to an increasingly diverse set of retail formats.

Value added, the sector's contribution to GDP, followed a similar trajectory. Total value added rose from $22.2 billion in 2014 to $33.1 billion in 2019 and $37.2 billion in 2024, a 67% increase over ten years. Direct value added grew from $9.0 billion to $13.2 billion to $15.4 billion, reflecting higher margins, greater service intensity, and the sector's expanding role as a provider of value-added solutions rather than a simple pass-through for manufactured goods.

Labor income growth has been equally pronounced. Total labor income across direct, indirect, and induced effects increased from $12.5 billion in 2014 to $18.5 billion in 2019 and $20.2 billion in 2024, a gain of 62% over the decade. Direct labor income grew by 70% from $4.4 billion to $7.5 billion, driven by a combination of workforce growth, rising wages in warehouse and driver positions, and increased investment in skilled roles such as sales management, data analysis, and compliance. The five-year growth in total labor income from 2019 to 2024 was more moderate at 9%, consistent with an industry that had already undergone significant wage adjustments during the tight labor markets of the early 2020s.

Employment has grown steadily across both periods. Total jobs supported by the sector rose from approximately 213,000 in 2014 to 229,400 in 2019 and 237,200 in 2024, an increase of about 24,200 positions over the decade. Direct employment grew from 66,800 to 68,900 to 72,300 over the same span. The more modest pace of employment growth relative to output and income growth reflects rising productivity per worker, as distributors invest in warehouse automation, route optimization, and technology systems that allow each employee to handle greater volume and complexity.

Tax contributions have kept pace with the sector's broader expansion. Total tax payments grew from $5.3 billion in 2014 to $7.9 billion in 2019 and $8.6 billion in 2024, a 62% increase over the decade. Federal tax contributions rose from $3.2 billion to $4.5 billion to $5.0 billion, while state and local revenues grew proportionally. These gains have strengthened the fiscal base of communities at every level of government, providing additional resources for infrastructure, education, and public services in the regions where distributors operate.

The multiplier effects have remained strong and remarkably stable across all three periods, indicating that the sector's deep integration with the broader economy is a structural feature rather than a cyclical phenomenon. The employment multiplier has hovered between 3.19 and 3.33 over the decade, consistently indicating that each direct job supports more than two additional positions elsewhere in the economy. Output and value added multipliers have shown similar consistency, confirming that the sector's supply chain relationships and workforce spending patterns continue to generate substantial ripple effects regardless of the broader economic environment.

It is important to note that these comparisons likely understate the actual growth of the convenience distribution sector over the past decade. The 2014, 2019, and 2024 estimates are all produced using the same IMPLAN sector definitions and the same proportional allocations to isolate convenience distribution within the broader wholesale trade categories. This approach holds the sector's market share constant across all three time periods. In reality, the convenience store channel has grown significantly over this span. The number of convenience stores in the United States has expanded, single-store operators have proliferated, foodservice programs have become a larger share of store revenue, and the range of products distributed through the convenience channel has broadened considerably. Each of these trends has increased the share of wholesale activity attributable to convenience distribution. Because the analysis does not adjust for these shifts in market composition, the growth rates presented here are likely conservative estimates of the expansion that has taken place. The true expansion of the convenience distribution sector's economic footprint over the past five and ten years has almost certainly been larger than these figures suggest.

APPENDIX D:
National & State Fact Sheets

Appendix D provides a detailed look at how convenience distribution contributes to individual state economies. These fact sheets draw on 2024 data from the IMPLAN model and offer a localized snapshot of the industry's footprint across all 50 states and the District of Columbia.

Each fact sheet opens with key economic indicators for the state, including population, GDP, total employment, and labor income. These figures set the stage for understanding the scale of convenience distribution's role within the broader state economy.

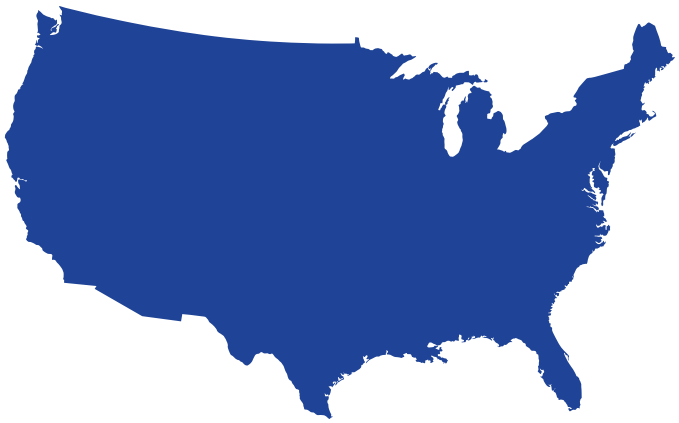
The next section captures the industry's direct economic contribution, reporting employment, labor income, value added, and total output. It also highlights average labor income per worker, offering a clear view of the industry's wage strength relative to the broader economy.

A third section expands the picture with direct, indirect, and induced impacts, along with the total combined effect. This reveals how convenience distribution supports activity among upstream suppliers and manufacturers, sustains the convenience retailers it serves, and drives consumer spending in local economies. This section also reports total tax receipts generated across all levels of government, capturing the fiscal contribution tied to each layer of activity.

Finally, each fact sheet features four key economic multipliers covering employment, labor income, value added, and output. These multipliers illustrate how much total economic activity is supported for every job or dollar generated directly within convenience distribution. Each multiplier is calculated by dividing the total impact (direct plus indirect plus induced) by the direct impact alone.

Together, these state-level profiles provide a clear and comparative view of how convenience distribution powers regional economies across the country.

United States



POPULATION (THOUSANDS) 340,111

GDP (BILLIONS $) 29,298

EMPLOYMENT (THOUSANDS) 218,819

LABOR INCOME (BILLIONS $) 17,072

Convenience Distribution Direct Economic Contribution

EMPLOYMENT (PERSONS)	LABOR INCOME (MILLIONS $)	VALUE ADDED (MILLIONS $)	OUTPUT (MILLIONS $)
72,349	7,517	15,435	28,317

AVERAGE LABOR INCOME $103,900

Direct, Indirect, Induced Impacts

	DIRECT	INDIRECT	INDUCED	TOTAL
EMPLOYMENT (PERSONS)	72,349	82,313	82,496	237,159
LABOR INCOME (MILLIONS $)	7,517	6,778	5,877	20,172
VALUE ADDED (MILLIONS $)	15,435	10,757	11,028	37,219
OUTPUT (MILLIONS $)	28,317	18,949	18,636	65,903
TOTAL TAX RECEIPTS (ALL LEVELS, MILLIONS $)	3,811	2,297	2,512	8,621

EMPLOYMENT Multiplier	LABOR INCOME Multiplier	VALUE ADDED Multiplier	OUTPUT Multiplier
3.3	2.7	2.4	2.3

Alabama

POPULATION (THOUSANDS) 5,158

GDP (BILLIONS $) 331

EMPLOYMENT (THOUSANDS) 2,937

LABOR INCOME (BILLIONS $) 190

Convenience Distribution Direct Economic Contribution

EMPLOYMENT (PERSONS)	LABOR INCOME (MILLIONS $)	VALUE ADDED (MILLIONS $)	OUTPUT (MILLIONS $)
819	70.0	149.6	285.4

AVERAGE LABOR INCOME $85,470

Direct, Indirect, Induced Impacts

	DIRECT	INDIRECT	INDUCED	TOTAL
EMPLOYMENT (PERSONS)	819	657	364	1,840
LABOR INCOME (MILLIONS $)	70.0	37.0	19.3	126.3
VALUE ADDED (MILLIONS $)	149.6	57.5	39.5	246.5
OUTPUT (MILLIONS $)	285.4	108.3	66.3	460.0
TOTAL TAX RECEIPTS (ALL LEVELS, MILLIONS $)	33.1	11.8	9.0	54.0

EMPLOYMENT Multiplier	LABOR INCOME Multiplier	VALUE ADDED Multiplier	OUTPUT Multiplier
2.2	1.8	1.6	1.6

Alaska

POPULATION (THOUSANDS) 740

GDP (BILLIONS $) 74

EMPLOYMENT (THOUSANDS) 485

LABOR INCOME (BILLIONS $) 39

Convenience Distribution Direct Economic Contribution

EMPLOYMENT (PERSONS)	LABOR INCOME (MILLIONS $)	VALUE ADDED (MILLIONS $)	OUTPUT (MILLIONS $)
127	9.2	15.7	35.5

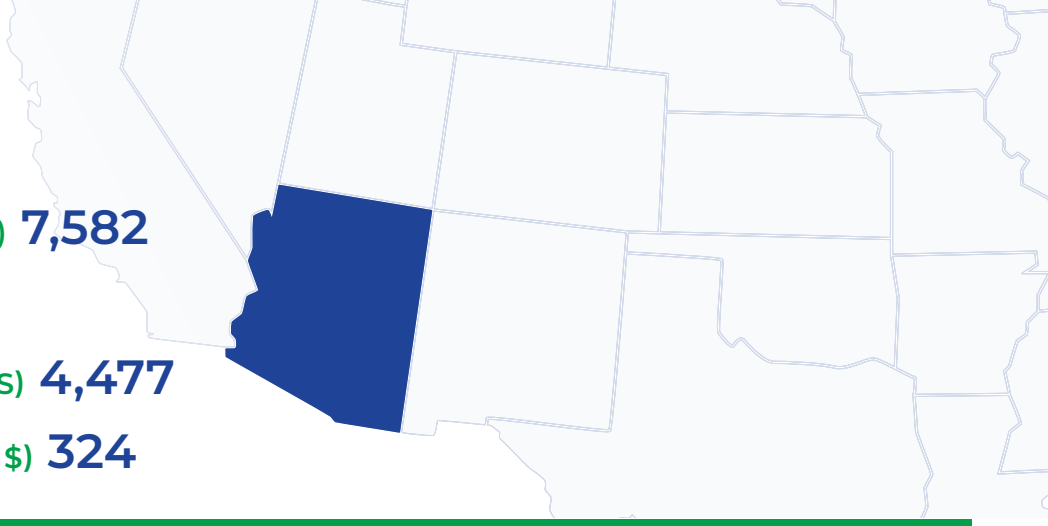
AVERAGE LABOR INCOME $72,205

Direct, Indirect, Induced Impacts

	DIRECT	INDIRECT	INDUCED	TOTAL
EMPLOYMENT (PERSONS)	127	62	46	235
LABOR INCOME (MILLIONS $)	9.2	4.7	3.1	16.9
VALUE ADDED (MILLIONS $)	15.7	7.4	5.7	28.7
OUTPUT (MILLIONS $)	35.5	12.9	9.1	57.5
TOTAL TAX RECEIPTS (ALL LEVELS, MILLIONS $)	2.9	1.3	1.0	5.2

EMPLOYMENT Multiplier	LABOR INCOME Multiplier	VALUE ADDED Multiplier	OUTPUT Multiplier
1.9	1.8	1.8	1.6

Arizona



POPULATION (THOUSANDS) 7,582

GDP (BILLIONS $) 578

EMPLOYMENT (THOUSANDS) 4,477

LABOR INCOME (BILLIONS $) 324

Convenience Distribution Direct Economic Contribution

EMPLOYMENT (PERSONS)	LABOR INCOME (MILLIONS $)	VALUE ADDED (MILLIONS $)	OUTPUT (MILLIONS $)
1,269	129.8	240.6	469.0

AVERAGE LABOR INCOME $102,293

Direct, Indirect, Induced Impacts

	DIRECT	INDIRECT	INDUCED	TOTAL
EMPLOYMENT (PERSONS)	1,269	1,224	921	3,414
LABOR INCOME (MILLIONS $)	129.8	82.0	60.4	272.2
VALUE ADDED (MILLIONS $)	240.6	129.9	121.9	492.4
OUTPUT (MILLIONS $)	469.0	225.6	194.6	889.1
TOTAL TAX RECEIPTS (ALL LEVELS, MILLIONS $)	53.3	26.0	26.4	105.7

EMPLOYMENT Multiplier	LABOR INCOME Multiplier	VALUE ADDED Multiplier	OUTPUT Multiplier
2.7	2.1	2.0	1.9

Arkansas

POPULATION (THOUSANDS) 3,088

GDP (BILLIONS $) 190

EMPLOYMENT (THOUSANDS) 1,787

LABOR INCOME (BILLIONS $) 108

Convenience Distribution Direct Economic Contribution

EMPLOYMENT (PERSONS)	LABOR INCOME (MILLIONS $)	VALUE ADDED (MILLIONS $)	OUTPUT (MILLIONS $)
664	74.8	165.1	282.3

AVERAGE LABOR INCOME $112,605

Direct, Indirect, Induced Impacts

	DIRECT	INDIRECT	INDUCED	TOTAL
EMPLOYMENT (PERSONS)	664	525	400	1,589
LABOR INCOME (MILLIONS $)	74.8	33.3	20.8	128.9
VALUE ADDED (MILLIONS $)	165.1	52.0	41.8	258.9
OUTPUT (MILLIONS $)	282.3	94.0	71.6	447.8
TOTAL TAX RECEIPTS (ALL LEVELS, MILLIONS $)	35.3	11.1	9.8	56.1

EMPLOYMENT Multiplier	LABOR INCOME Multiplier	VALUE ADDED Multiplier	OUTPUT Multiplier
2.4	1.7	1.6	1.6

California

POPULATION (THOUSANDS) 39,431

GDP (BILLIONS $) 4,063

EMPLOYMENT (THOUSANDS) 25,810

LABOR INCOME (BILLIONS $) 2,402

Convenience Distribution Direct Economic Contribution

EMPLOYMENT (PERSONS)	LABOR INCOME (MILLIONS $)	VALUE ADDED (MILLIONS $)	OUTPUT (MILLIONS $)
9,525	992.9	2,081.5	3,759.0

AVERAGE LABOR INCOME $104,240

Direct, Indirect, Induced Impacts

	DIRECT	INDIRECT	INDUCED	TOTAL
EMPLOYMENT (PERSONS)	9,525	7,708	6,208	23,441
LABOR INCOME (MILLIONS $)	992.9	723.9	480.0	2,196.8
VALUE ADDED (MILLIONS $)	2,081.5	1,122.6	908.7	4,112.8
OUTPUT (MILLIONS $)	3,759.0	1,764.5	1,404.0	6,927.5
TOTAL TAX RECEIPTS (ALL LEVELS, MILLIONS $)	672.7	249.8	221.2	1,143.7

EMPLOYMENT Multiplier	LABOR INCOME Multiplier	VALUE ADDED Multiplier	OUTPUT Multiplier
2.5	2.2	2.0	1.8

Colorado

POPULATION (THOUSANDS) 5,958

GDP (BILLIONS $) 567

EMPLOYMENT (THOUSANDS) 4,299

LABOR INCOME (BILLIONS $) 350

Convenience Distribution Direct Economic Contribution

EMPLOYMENT (PERSONS)	LABOR INCOME (MILLIONS $)	VALUE ADDED (MILLIONS $)	OUTPUT (MILLIONS $)
1,319	141.5	259.6	492.2

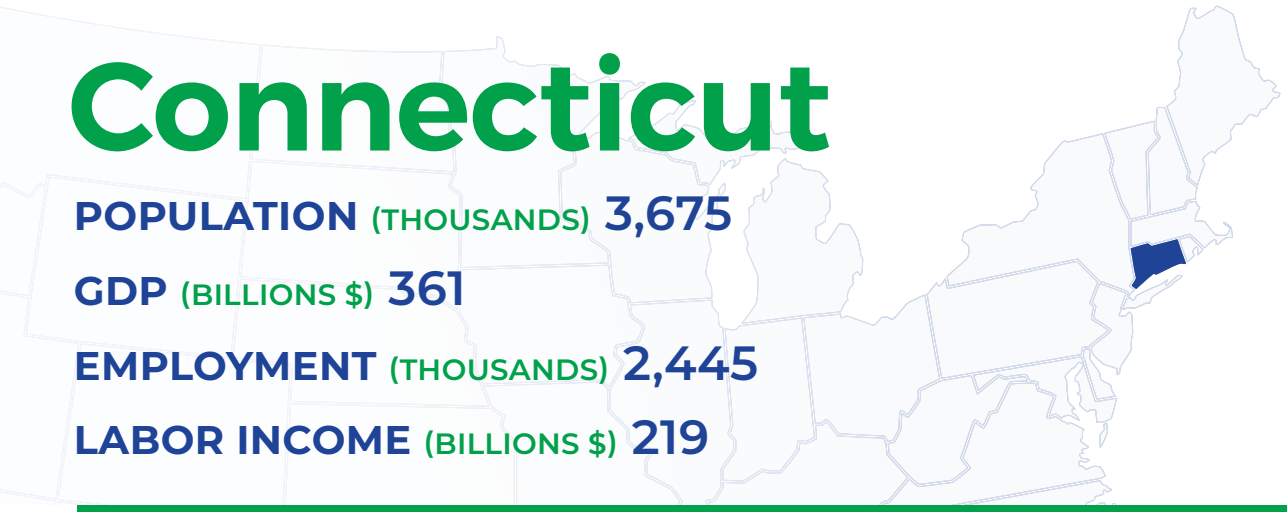
AVERAGE LABOR INCOME $107,263

Direct, Indirect, Induced Impacts

	DIRECT	INDIRECT	INDUCED	TOTAL
EMPLOYMENT (PERSONS)	1,319	1,234	934	3,487
LABOR INCOME (MILLIONS $)	141.5	94.6	63.9	300.0
VALUE ADDED (MILLIONS $)	259.6	142.8	124.7	527.1
OUTPUT (MILLIONS $)	492.2	242.2	198.6	933.0
TOTAL TAX RECEIPTS (ALL LEVELS, MILLIONS $)	53.3	28.5	28.0	109.8

EMPLOYMENT Multiplier	LABOR INCOME Multiplier	VALUE ADDED Multiplier	OUTPUT Multiplier
2.6	2.1	2.0	1.9

Connecticut



POPULATION (THOUSANDS) 3,675

GDP (BILLIONS $) 361

EMPLOYMENT (THOUSANDS) 2,445

LABOR INCOME (BILLIONS $) 219

Convenience Distribution Direct Economic Contribution

EMPLOYMENT (PERSONS)	LABOR INCOME (MILLIONS $)	VALUE ADDED (MILLIONS $)	OUTPUT (MILLIONS $)
772	93.1	199.8	339.2

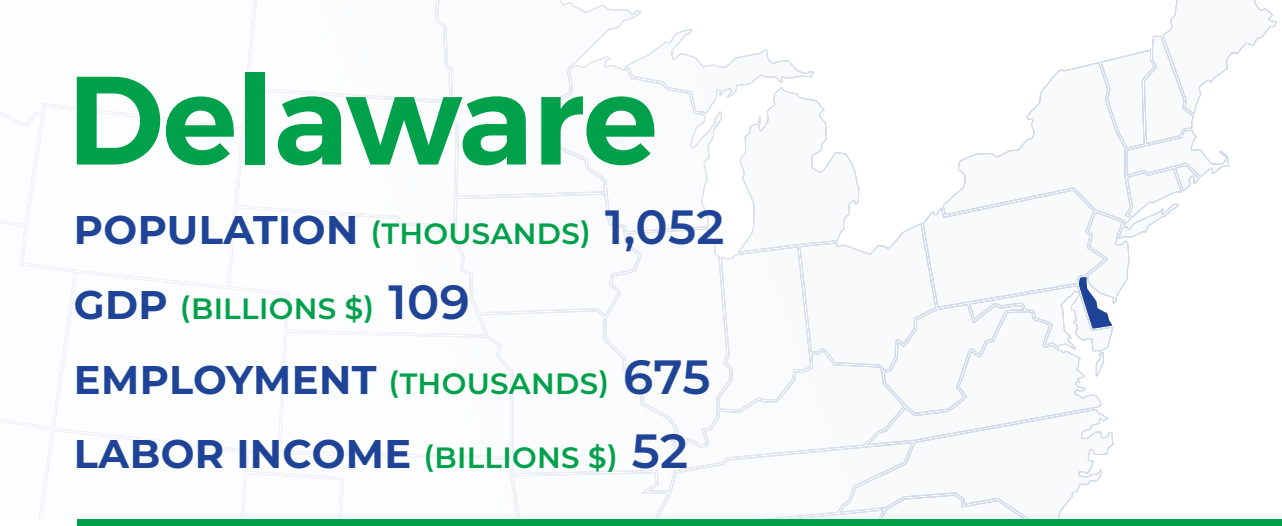
AVERAGE LABOR INCOME $120,583

Direct, Indirect, Induced Impacts

	DIRECT	INDIRECT	INDUCED	TOTAL
EMPLOYMENT (PERSONS)	772	533	378	1,683
LABOR INCOME (MILLIONS $)	93.1	42.8	26.8	162.7
VALUE ADDED (MILLIONS $)	199.8	61.7	51.6	313.0
OUTPUT (MILLIONS $)	339.2	98.4	76.2	513.7
TOTAL TAX RECEIPTS (ALL LEVELS, MILLIONS $)	44.8	14.7	13.5	72.9

EMPLOYMENT Multiplier	LABOR INCOME Multiplier	VALUE ADDED Multiplier	OUTPUT Multiplier
2.2	1.7	1.6	1.5

Delaware



POPULATION (THOUSANDS) 1,052

GDP (BILLIONS $) 109

EMPLOYMENT (THOUSANDS) 675

LABOR INCOME (BILLIONS $) 52

Convenience Distribution Direct Economic Contribution

EMPLOYMENT (PERSONS)	LABOR INCOME (MILLIONS $)	VALUE ADDED (MILLIONS $)	OUTPUT (MILLIONS $)
148	15.7	32.2	61.2

AVERAGE LABOR INCOME $105,811

Direct, Indirect, Induced Impacts

	DIRECT	INDIRECT	INDUCED	TOTAL
EMPLOYMENT (PERSONS)	148	143	62	353
LABOR INCOME (MILLIONS $)	15.7	5.7	3.9	25.2
VALUE ADDED (MILLIONS $)	32.2	14.6	8.1	54.9
OUTPUT (MILLIONS $)	61.2	22.9	12.4	96.6
TOTAL TAX RECEIPTS (ALL LEVELS, MILLIONS $)	8.6	2.6	1.5	12.7

EMPLOYMENT Multiplier	LABOR INCOME Multiplier	VALUE ADDED Multiplier	OUTPUT Multiplier
2.4	1.6	1.7	1.6

District of Columbia

POPULATION (THOUSANDS) 702

GDP (BILLIONS $) 187

EMPLOYMENT (THOUSANDS) 915

LABOR INCOME (BILLIONS $) 130

Convenience Distribution Direct Economic Contribution

EMPLOYMENT (PERSONS)	LABOR INCOME (MILLIONS $)	VALUE ADDED (MILLIONS $)	OUTPUT (MILLIONS $)
50	6.8	19.2	29.8

AVERAGE LABOR INCOME $136,400

Direct, Indirect, Induced Impacts

	DIRECT	INDIRECT	INDUCED	TOTAL
EMPLOYMENT (PERSONS)	50	27	8	84
LABOR INCOME (MILLIONS $)	6.8	3.4	0.8	11.0
VALUE ADDED (MILLIONS $)	19.2	4.9	1.4	25.5
OUTPUT (MILLIONS $)	29.8	7.0	1.9	38.8
TOTAL TAX RECEIPTS (ALL LEVELS, MILLIONS $)	4.4	0.8	0.3	5.5

EMPLOYMENT Multiplier	LABOR INCOME Multiplier	VALUE ADDED Multiplier	OUTPUT Multiplier
1.7	1.6	1.3	1.3

Florida

POPULATION (THOUSANDS) 23,372

GDP (BILLIONS $) 1,721

EMPLOYMENT (THOUSANDS) 14,969

LABOR INCOME (BILLIONS $) 962

Convenience Distribution Direct Economic Contribution

EMPLOYMENT (PERSONS)	LABOR INCOME (MILLIONS $)	VALUE ADDED (MILLIONS $)	OUTPUT (MILLIONS $)
5,404	562.5	1,144.1	2,108.7

AVERAGE LABOR INCOME $104,090

Direct, Indirect, Induced Impacts

	DIRECT	INDIRECT	INDUCED	TOTAL
EMPLOYMENT (PERSONS)	5,404	5,649	4,165	15,217
LABOR INCOME (MILLIONS $)	562.5	357.8	253.1	1,173.4
VALUE ADDED (MILLIONS $)	1,144.1	555.8	505.0	2,204.8
OUTPUT (MILLIONS $)	2,108.7	1,001.4	836.8	3,946.9
TOTAL TAX RECEIPTS (ALL LEVELS, MILLIONS $)	284.4	121.1	115.1	520.6

EMPLOYMENT Multiplier	LABOR INCOME Multiplier	VALUE ADDED Multiplier	OUTPUT Multiplier
2.8	2.1	1.9	1.9

Georgia

POPULATION (THOUSANDS) 11,181

GDP (BILLIONS $) 879

EMPLOYMENT (THOUSANDS) 7,204

LABOR INCOME (BILLIONS $) 489

Convenience Distribution Direct Economic Contribution

EMPLOYMENT (PERSONS)	LABOR INCOME (MILLIONS $)	VALUE ADDED (MILLIONS $)	OUTPUT (MILLIONS $)
2,135	201.2	494.1	862.3

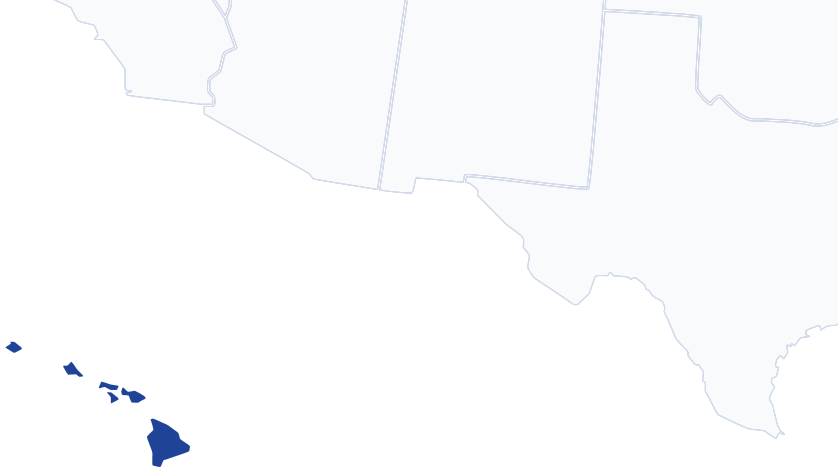
AVERAGE LABOR INCOME $94,258

Direct, Indirect, Induced Impacts

	DIRECT	INDIRECT	INDUCED	TOTAL
EMPLOYMENT (PERSONS)	2,135	2,077	1,492	5,704
LABOR INCOME (MILLIONS $)	201.2	146.0	88.8	436.0
VALUE ADDED (MILLIONS $)	494.1	234.2	178.0	906.3
OUTPUT (MILLIONS $)	862.3	397.3	289.6	1,549.3
TOTAL TAX RECEIPTS (ALL LEVELS, MILLIONS $)	116.5	46.3	38.3	201.1

EMPLOYMENT Multiplier	LABOR INCOME Multiplier	VALUE ADDED Multiplier	OUTPUT Multiplier
2.7	2.2	1.8	1.8

Hawaii



POPULATION (THOUSANDS) 1,446

GDP (BILLIONS $) 122

EMPLOYMENT (THOUSANDS) 946

LABOR INCOME (BILLIONS $) 71

Convenience Distribution Direct Economic Contribution

EMPLOYMENT (PERSONS)	LABOR INCOME (MILLIONS $)	VALUE ADDED (MILLIONS $)	OUTPUT (MILLIONS $)
426	32.4	53.3	121.9

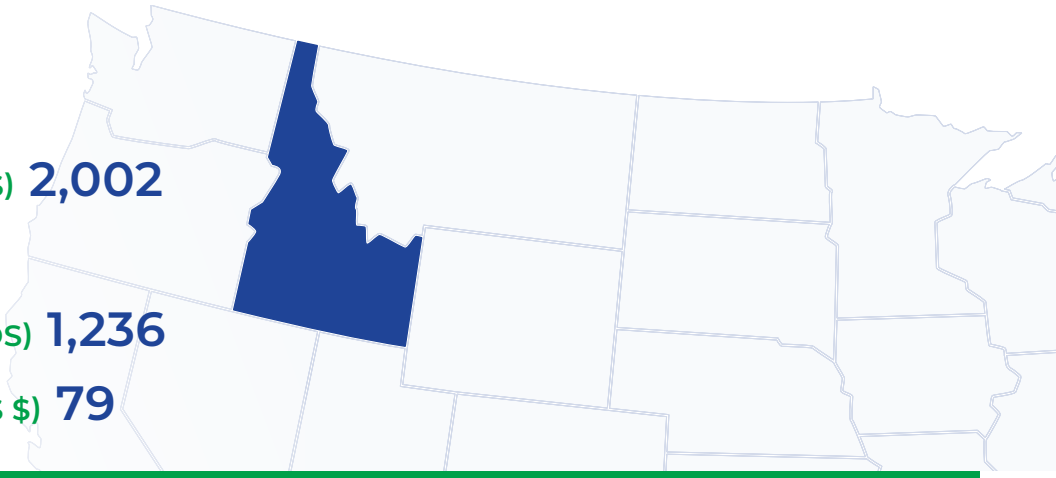
AVERAGE LABOR INCOME $76,127

Direct, Indirect, Induced Impacts

	DIRECT	INDIRECT	INDUCED	TOTAL
EMPLOYMENT (PERSONS)	426	269	179	873
LABOR INCOME (MILLIONS $)	32.4	18.8	11.7	62.9
VALUE ADDED (MILLIONS $)	53.3	31.0	24.2	108.5
OUTPUT (MILLIONS $)	121.9	52.3	37.6	211.8
TOTAL TAX RECEIPTS (ALL LEVELS, MILLIONS $)	11.5	6.8	6.0	24.2

EMPLOYMENT Multiplier	LABOR INCOME Multiplier	VALUE ADDED Multiplier	OUTPUT Multiplier
2.0	1.9	2.0	1.7

Idaho



POPULATION (THOUSANDS) 2,002

GDP (BILLIONS $) 132

EMPLOYMENT (THOUSANDS) 1,236

LABOR INCOME (BILLIONS $) 79

Convenience Distribution Direct Economic Contribution

EMPLOYMENT (PERSONS)	LABOR INCOME (MILLIONS $)	VALUE ADDED (MILLIONS $)	OUTPUT (MILLIONS $)
500	45.4	89.3	173.3

AVERAGE LABOR INCOME $90,840

Direct, Indirect, Induced Impacts

	DIRECT	INDIRECT	INDUCED	TOTAL
EMPLOYMENT (PERSONS)	500	401	260	1,161
LABOR INCOME (MILLIONS $)	45.4	23.7	15.4	84.5
VALUE ADDED (MILLIONS $)	89.3	37.1	30.5	157.0
OUTPUT (MILLIONS $)	173.3	70.6	51.0	294.9
TOTAL TAX RECEIPTS (ALL LEVELS, MILLIONS $)	19.9	7.8	7.0	34.6

EMPLOYMENT Multiplier	LABOR INCOME Multiplier	VALUE ADDED Multiplier	OUTPUT Multiplier
2.3	1.9	1.8	1.7

Illinois

POPULATION (THOUSANDS) 12,710

GDP (BILLIONS $) 1,137

EMPLOYMENT (THOUSANDS) 8,314

LABOR INCOME (BILLIONS $) 666

Convenience Distribution Direct Economic Contribution

EMPLOYMENT (PERSONS)	LABOR INCOME (MILLIONS $)	VALUE ADDED (MILLIONS $)	OUTPUT (MILLIONS $)
3,888	462.9	976.1	1,656.6

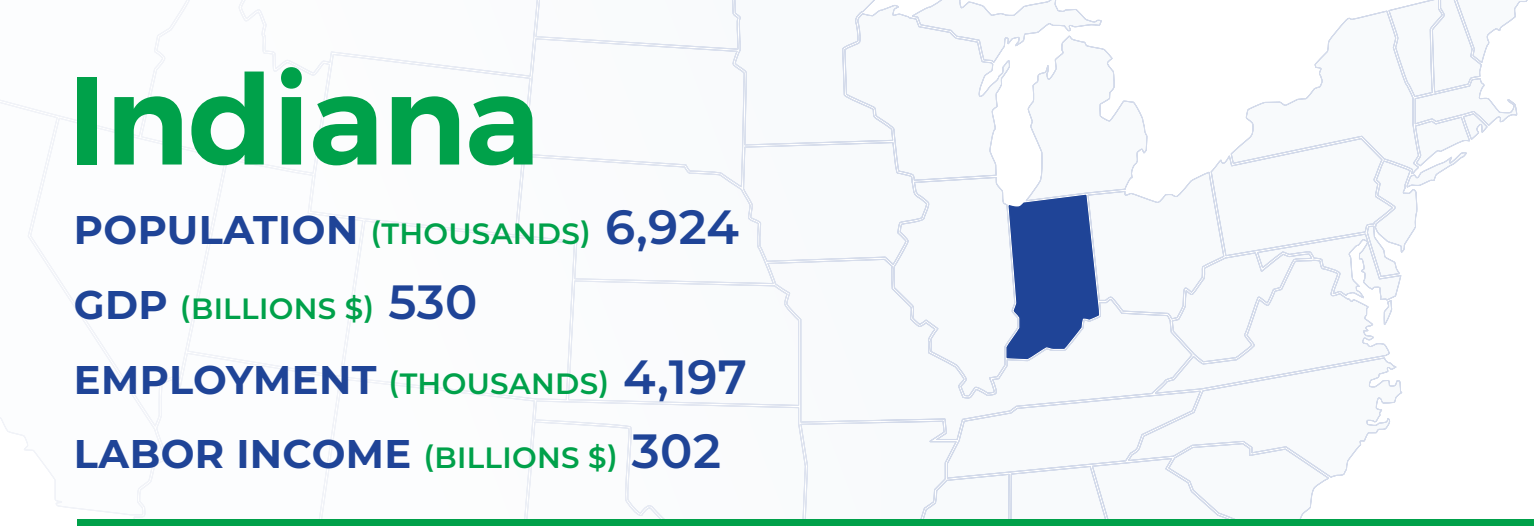
AVERAGE LABOR INCOME $119,051

Direct, Indirect, Induced Impacts

	DIRECT	INDIRECT	INDUCED	TOTAL
EMPLOYMENT (PERSONS)	3,888	3,303	2,981	10,173
LABOR INCOME (MILLIONS $)	462.9	273.2	205.2	941.2
VALUE ADDED (MILLIONS $)	976.1	427.6	382.1	1,785.8
OUTPUT (MILLIONS $)	1,656.6	699.0	609.6	2,965.2
TOTAL TAX RECEIPTS (ALL LEVELS, MILLIONS $)	228.6	92.1	93.7	414.4

EMPLOYMENT Multiplier	LABOR INCOME Multiplier	VALUE ADDED Multiplier	OUTPUT Multiplier
2.6	2.0	1.8	1.8

Indiana



POPULATION (THOUSANDS) 6,924

GDP (BILLIONS $) 530

EMPLOYMENT (THOUSANDS) 4,197

LABOR INCOME (BILLIONS $) 302

Convenience Distribution Direct Economic Contribution

EMPLOYMENT (PERSONS)	LABOR INCOME (MILLIONS $)	VALUE ADDED (MILLIONS $)	OUTPUT (MILLIONS $)
1,148	113.1	222.4	430.9

AVERAGE LABOR INCOME $98,528

Direct, Indirect, Induced Impacts

	DIRECT	INDIRECT	INDUCED	TOTAL
EMPLOYMENT (PERSONS)	1,148	923	682	2,754
LABOR INCOME (MILLIONS $)	113.1	63.8	43.0	219.9
VALUE ADDED (MILLIONS $)	222.4	94.8	79.1	396.3
OUTPUT (MILLIONS $)	430.9	164.5	128.6	724.0
TOTAL TAX RECEIPTS (ALL LEVELS, MILLIONS $)	46.4	19.7	17.4	83.5

EMPLOYMENT Multiplier	LABOR INCOME Multiplier	VALUE ADDED Multiplier	OUTPUT Multiplier
2.4	1.9	1.8	1.7

Iowa

POPULATION (THOUSANDS) 3,242

GDP (BILLIONS $) 269

EMPLOYMENT (THOUSANDS) 2,140

LABOR INCOME (BILLIONS $) 145

Convenience Distribution Direct Economic Contribution

EMPLOYMENT (PERSONS)	LABOR INCOME (MILLIONS $)	VALUE ADDED (MILLIONS $)	OUTPUT (MILLIONS $)
844	89.9	177.7	329.8

AVERAGE LABOR INCOME $106,457

Direct, Indirect, Induced Impacts

	DIRECT	INDIRECT	INDUCED	TOTAL
EMPLOYMENT (PERSONS)	844	629	459	1,932
LABOR INCOME (MILLIONS $)	89.9	40.6	25.1	155.5
VALUE ADDED (MILLIONS $)	177.7	65.3	50.8	293.8
OUTPUT (MILLIONS $)	329.8	115.3	83.4	528.4
TOTAL TAX RECEIPTS (ALL LEVELS, MILLIONS $)	42.2	13.4	11.2	66.8

EMPLOYMENT Multiplier	LABOR INCOME Multiplier	VALUE ADDED Multiplier	OUTPUT Multiplier
2.3	1.7	1.7	1.6

Kansas

POPULATION (THOUSANDS) 2,971

GDP (BILLIONS $) 234

EMPLOYMENT (THOUSANDS) 2,007

LABOR INCOME (BILLIONS $) 141

Convenience Distribution Direct Economic Contribution

EMPLOYMENT (PERSONS)	LABOR INCOME (MILLIONS $)	VALUE ADDED (MILLIONS $)	OUTPUT (MILLIONS $)
609	58.0	128.4	242.7

AVERAGE LABOR INCOME $95,238

Direct, Indirect, Induced Impacts

	DIRECT	INDIRECT	INDUCED	TOTAL
EMPLOYMENT (PERSONS)	609	510	327	1,445
LABOR INCOME (MILLIONS $)	58.0	36.0	19.6	113.6
VALUE ADDED (MILLIONS $)	128.4	51.8	36.6	216.7
OUTPUT (MILLIONS $)	242.7	95.5	62.7	401.0
TOTAL TAX RECEIPTS (ALL LEVELS, MILLIONS $)	24.8	10.9	8.5	44.2

EMPLOYMENT Multiplier	LABOR INCOME Multiplier	VALUE ADDED Multiplier	OUTPUT Multiplier
2.4	2.0	1.7	1.7

Kentucky

POPULATION (THOUSANDS) 4,588

GDP (BILLIONS $) 302

EMPLOYMENT (THOUSANDS) 2,713

LABOR INCOME (BILLIONS $) 180

Convenience Distribution Direct Economic Contribution

EMPLOYMENT (PERSONS)	LABOR INCOME (MILLIONS $)	VALUE ADDED (MILLIONS $)	OUTPUT (MILLIONS $)
947	85.5	191.0	361.6

AVERAGE LABOR INCOME $90,232

Direct, Indirect, Induced Impacts

	DIRECT	INDIRECT	INDUCED	TOTAL
EMPLOYMENT (PERSONS)	947	741	497	2,185
LABOR INCOME (MILLIONS $)	85.5	50.5	29.4	165.4
VALUE ADDED (MILLIONS $)	191.0	73.7	54.3	319.0
OUTPUT (MILLIONS $)	361.6	133.4	91.8	586.8
TOTAL TAX RECEIPTS (ALL LEVELS, MILLIONS $)	42.2	15.2	12.3	69.7

EMPLOYMENT Multiplier	LABOR INCOME Multiplier	VALUE ADDED Multiplier	OUTPUT Multiplier
2.3	1.9	1.7	1.6

Louisiana

POPULATION (THOUSANDS) 4,598

GDP (BILLIONS $) 337

EMPLOYMENT (THOUSANDS) 2,812

LABOR INCOME (BILLIONS $) 177

Convenience Distribution Direct Economic Contribution

EMPLOYMENT (PERSONS)	LABOR INCOME (MILLIONS $)	VALUE ADDED (MILLIONS $)	OUTPUT (MILLIONS $)
810	77.9	144.7	285.8

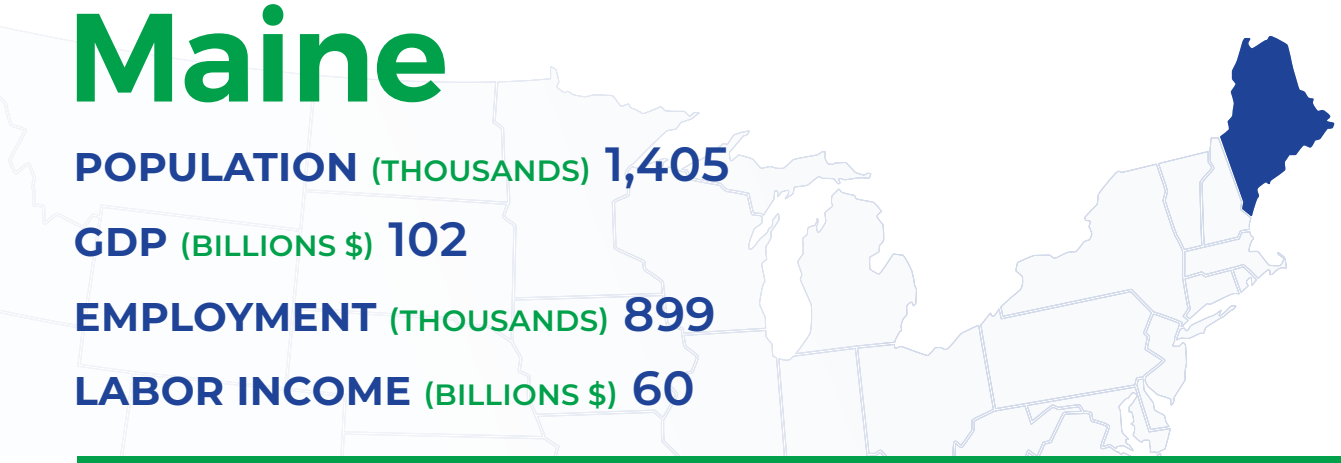
AVERAGE LABOR INCOME $96,123

Direct, Indirect, Induced Impacts

	DIRECT	INDIRECT	INDUCED	TOTAL
EMPLOYMENT (PERSONS)	810	617	434	1,860
LABOR INCOME (MILLIONS $)	77.9	35.4	22.8	136.1
VALUE ADDED (MILLIONS $)	144.7	59.7	45.8	250.3
OUTPUT (MILLIONS $)	285.8	110.1	78.0	473.8
TOTAL TAX RECEIPTS (ALL LEVELS, MILLIONS $)	31.7	11.4	10.3	53.4

EMPLOYMENT Multiplier	LABOR INCOME Multiplier	VALUE ADDED Multiplier	OUTPUT Multiplier
2.3	1.7	1.7	1.7

Maine



POPULATION (THOUSANDS) 1,405

GDP (BILLIONS $) 102

EMPLOYMENT (THOUSANDS) 899

LABOR INCOME (BILLIONS $) 60

Convenience Distribution Direct Economic Contribution

EMPLOYMENT (PERSONS)	LABOR INCOME (MILLIONS $)	VALUE ADDED (MILLIONS $)	OUTPUT (MILLIONS $)
300	24.3	46.8	102.5

AVERAGE LABOR INCOME $81,033

Direct, Indirect, Induced Impacts

	DIRECT	INDIRECT	INDUCED	TOTAL
EMPLOYMENT (PERSONS)	300	244	168	712
LABOR INCOME (MILLIONS $)	24.3	17.1	10.6	52.0
VALUE ADDED (MILLIONS $)	46.8	26.0	21.2	94.0
OUTPUT (MILLIONS $)	102.5	45.9	33.8	182.2
TOTAL TAX RECEIPTS (ALL LEVELS, MILLIONS $)	11.2	5.6	4.9	21.8

EMPLOYMENT Multiplier	LABOR INCOME Multiplier	VALUE ADDED Multiplier	OUTPUT Multiplier
2.4	2.1	2.0	1.8

Maryland

POPULATION (THOUSANDS) 6,263

GDP (BILLIONS $) 553

EMPLOYMENT (THOUSANDS) 4,039

LABOR INCOME (BILLIONS $) 320

Convenience Distribution Direct Economic Contribution

EMPLOYMENT (PERSONS)	LABOR INCOME (MILLIONS $)	VALUE ADDED (MILLIONS $)	OUTPUT (MILLIONS $)
1,197	108.3	242.8	441.4

AVERAGE LABOR INCOME $90,459

Direct, Indirect, Induced Impacts

	DIRECT	INDIRECT	INDUCED	TOTAL
EMPLOYMENT (PERSONS)	1,197	982	584	2,762
LABOR INCOME (MILLIONS $)	108.3	68.0	37.9	214.1
VALUE ADDED (MILLIONS $)	242.8	106.8	74.0	423.7
OUTPUT (MILLIONS $)	441.4	178.2	115.7	735.2
TOTAL TAX RECEIPTS (ALL LEVELS, MILLIONS $)	69.4	23.9	17.8	111.0

EMPLOYMENT Multiplier	LABOR INCOME Multiplier	VALUE ADDED Multiplier	OUTPUT Multiplier
2.3	2.0	1.7	1.7

Massachusetts

POPULATION (THOUSANDS) 7,136

GDP (BILLIONS $) 784

EMPLOYMENT (THOUSANDS) 5,001

LABOR INCOME (BILLIONS $) 493

Convenience Distribution Direct Economic Contribution

EMPLOYMENT (PERSONS)	LABOR INCOME (MILLIONS $)	VALUE ADDED (MILLIONS $)	OUTPUT (MILLIONS $)
1,446	170.8	331.4	601.8

AVERAGE LABOR INCOME $118,119

Direct, Indirect, Induced Impacts

	DIRECT	INDIRECT	INDUCED	TOTAL
EMPLOYMENT (PERSONS)	1,446	1,078	906	3,430
LABOR INCOME (MILLIONS $)	170.8	99.6	76.6	347.0
VALUE ADDED (MILLIONS $)	331.4	152.4	134.8	618.6
OUTPUT (MILLIONS $)	601.8	241.2	203.2	1,046.2
TOTAL TAX RECEIPTS (ALL LEVELS, MILLIONS $)	78.0	32.1	29.9	140.0

EMPLOYMENT Multiplier	LABOR INCOME Multiplier	VALUE ADDED Multiplier	OUTPUT Multiplier
2.4	2.0	1.9	1.7

Michigan

POPULATION (THOUSANDS) 10,141

GDP (BILLIONS $) 721

EMPLOYMENT (THOUSANDS) 6,037

LABOR INCOME (BILLIONS $) 436

Convenience Distribution Direct Economic Contribution

EMPLOYMENT (PERSONS)	LABOR INCOME (MILLIONS $)	VALUE ADDED (MILLIONS $)	OUTPUT (MILLIONS $)
1,695	172.8	332.3	627.8

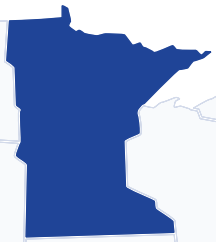
AVERAGE LABOR INCOME $101,935

Direct, Indirect, Induced Impacts

	DIRECT	INDIRECT	INDUCED	TOTAL
EMPLOYMENT (PERSONS)	1,695	1,544	1,226	4,465
LABOR INCOME (MILLIONS $)	172.8	108.9	75.4	357.1
VALUE ADDED (MILLIONS $)	332.3	161.1	139.3	632.7
OUTPUT (MILLIONS $)	627.8	285.3	233.6	1,146.7
TOTAL TAX RECEIPTS (ALL LEVELS, MILLIONS $)	68.2	33.3	31.5	133.1

EMPLOYMENT Multiplier	LABOR INCOME Multiplier	VALUE ADDED Multiplier	OUTPUT Multiplier
2.6	2.1	1.9	1.8

Minnesota



POPULATION (THOUSANDS) 5,793

GDP (BILLIONS $) 513

EMPLOYMENT (THOUSANDS) 3,955

LABOR INCOME (BILLIONS $) 311

Convenience Distribution Direct Economic Contribution

EMPLOYMENT (PERSONS)	LABOR INCOME (MILLIONS $)	VALUE ADDED (MILLIONS $)	OUTPUT (MILLIONS $)
1,375	186.9	334.6	576.8

AVERAGE LABOR INCOME $135,935

Direct, Indirect, Induced Impacts

	DIRECT	INDIRECT	INDUCED	TOTAL
EMPLOYMENT (PERSONS)	1,375	1,132	1,191	3,699
LABOR INCOME (MILLIONS $)	186.9	91.0	81.1	359.0
VALUE ADDED (MILLIONS $)	334.6	138.9	149.9	623.4
OUTPUT (MILLIONS $)	576.8	240.0	242.4	1,059.2
TOTAL TAX RECEIPTS (ALL LEVELS, MILLIONS $)	74.8	30.9	35.8	141.5

EMPLOYMENT Multiplier	LABOR INCOME Multiplier	VALUE ADDED Multiplier	OUTPUT Multiplier
2.7	1.9	1.9	1.8

Mississippi

POPULATION (THOUSANDS) 2,943

GDP (BILLIONS $) 162

EMPLOYMENT (THOUSANDS) 1,689

LABOR INCOME (BILLIONS $) 90

Convenience Distribution Direct Economic Contribution

EMPLOYMENT (PERSONS)	LABOR INCOME (MILLIONS $)	VALUE ADDED (MILLIONS $)	OUTPUT (MILLIONS $)
522	40.6	76.3	164.7

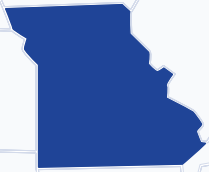
AVERAGE LABOR INCOME $77,759

Direct, Indirect, Induced Impacts

	DIRECT	INDIRECT	INDUCED	TOTAL
EMPLOYMENT (PERSONS)	522	410	214	1,147
LABOR INCOME (MILLIONS $)	40.6	20.3	9.9	70.8
VALUE ADDED (MILLIONS $)	76.3	33.0	21.3	130.7
OUTPUT (MILLIONS $)	164.7	64.8	37.2	266.6
TOTAL TAX RECEIPTS (ALL LEVELS, MILLIONS $)	18.1	7.0	5.0	30.2

EMPLOYMENT Multiplier	LABOR INCOME Multiplier	VALUE ADDED Multiplier	OUTPUT Multiplier
2.2	1.7	1.7	1.6

Missouri



POPULATION (THOUSANDS) 6,246

GDP (BILLIONS $) 450

EMPLOYMENT (THOUSANDS) 3,973

LABOR INCOME (BILLIONS $) 269

Convenience Distribution Direct Economic Contribution

EMPLOYMENT (PERSONS)	LABOR INCOME (MILLIONS $)	VALUE ADDED (MILLIONS $)	OUTPUT (MILLIONS $)
1,328	133.3	270.1	511.8

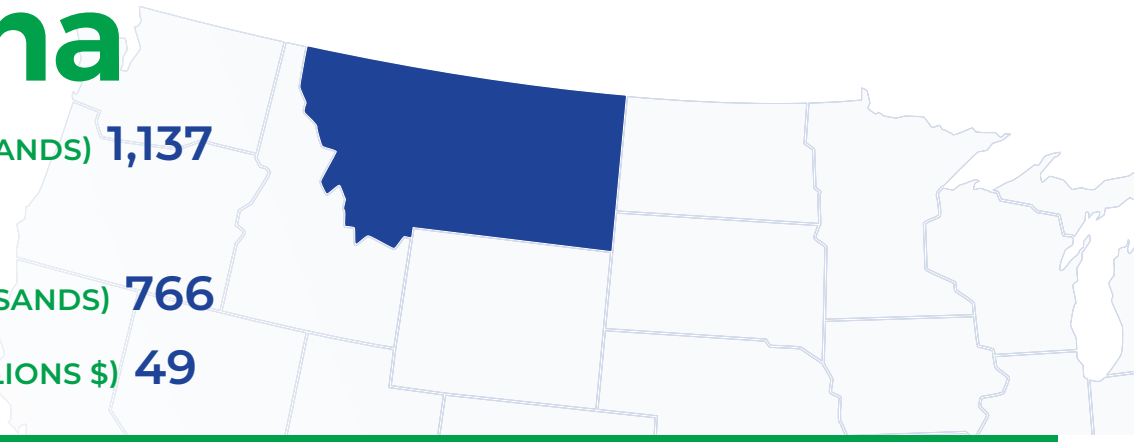
AVERAGE LABOR INCOME $100,346

Direct, Indirect, Induced Impacts

	DIRECT	INDIRECT	INDUCED	TOTAL
EMPLOYMENT (PERSONS)	1,328	1,188	871	3,386
LABOR INCOME (MILLIONS $)	133.3	81.9	53.0	268.1
VALUE ADDED (MILLIONS $)	270.1	124.0	99.1	493.3
OUTPUT (MILLIONS $)	511.8	221.4	165.4	898.5
TOTAL TAX RECEIPTS (ALL LEVELS, MILLIONS $)	56.3	25.0	21.2	102.5

EMPLOYMENT Multiplier	LABOR INCOME Multiplier	VALUE ADDED Multiplier	OUTPUT Multiplier
2.5	2.0	1.8	1.8

Montana



POPULATION (THOUSANDS) 1,137

GDP (BILLIONS $) 81

EMPLOYMENT (THOUSANDS) 766

LABOR INCOME (BILLIONS $) 49

Convenience Distribution Direct Economic Contribution

EMPLOYMENT (PERSONS)	LABOR INCOME (MILLIONS $)	VALUE ADDED (MILLIONS $)	OUTPUT (MILLIONS $)
241	20.3	38.1	79.7

AVERAGE LABOR INCOME $84,025

Direct, Indirect, Induced Impacts

	DIRECT	INDIRECT	INDUCED	TOTAL
EMPLOYMENT (PERSONS)	241	180	125	546
LABOR INCOME (MILLIONS $)	20.3	10.9	7.4	38.5
VALUE ADDED (MILLIONS $)	38.1	16.9	13.6	68.6
OUTPUT (MILLIONS $)	79.7	31.7	23.2	134.6
TOTAL TAX RECEIPTS (ALL LEVELS, MILLIONS $)	8.5	3.6	3.0	15.0

EMPLOYMENT Multiplier	LABOR INCOME Multiplier	VALUE ADDED Multiplier	OUTPUT Multiplier
2.3	1.9	1.8	1.7

Nebraska

POPULATION (THOUSANDS) 2,006

GDP (BILLIONS $) 189

EMPLOYMENT (THOUSANDS) 1,410

LABOR INCOME (BILLIONS $) 101

Convenience Distribution Direct Economic Contribution

EMPLOYMENT (PERSONS)	LABOR INCOME (MILLIONS $)	VALUE ADDED (MILLIONS $)	OUTPUT (MILLIONS $)
501	59.0	126.3	219.7

AVERAGE LABOR INCOME $117,844

Direct, Indirect, Induced Impacts

	DIRECT	INDIRECT	INDUCED	TOTAL
EMPLOYMENT (PERSONS)	501	423	324	1,249
LABOR INCOME (MILLIONS $)	59.0	28.3	19.2	106.6
VALUE ADDED (MILLIONS $)	126.3	46.7	38.1	211.1
OUTPUT (MILLIONS $)	219.7	82.2	62.0	363.9
TOTAL TAX RECEIPTS (ALL LEVELS, MILLIONS $)	26.1	9.2	8.2	43.5

EMPLOYMENT Multiplier	LABOR INCOME Multiplier	VALUE ADDED Multiplier	OUTPUT Multiplier
2.5	1.8	1.7	1.7

Nevada

POPULATION (THOUSANDS) 3,268

GDP (BILLIONS $) 270

EMPLOYMENT (THOUSANDS) 2,147

LABOR INCOME (BILLIONS $) 149

Convenience Distribution Direct Economic Contribution

EMPLOYMENT (PERSONS)	LABOR INCOME (MILLIONS $)	VALUE ADDED (MILLIONS $)	OUTPUT (MILLIONS $)
525	48.9	91.6	182.3

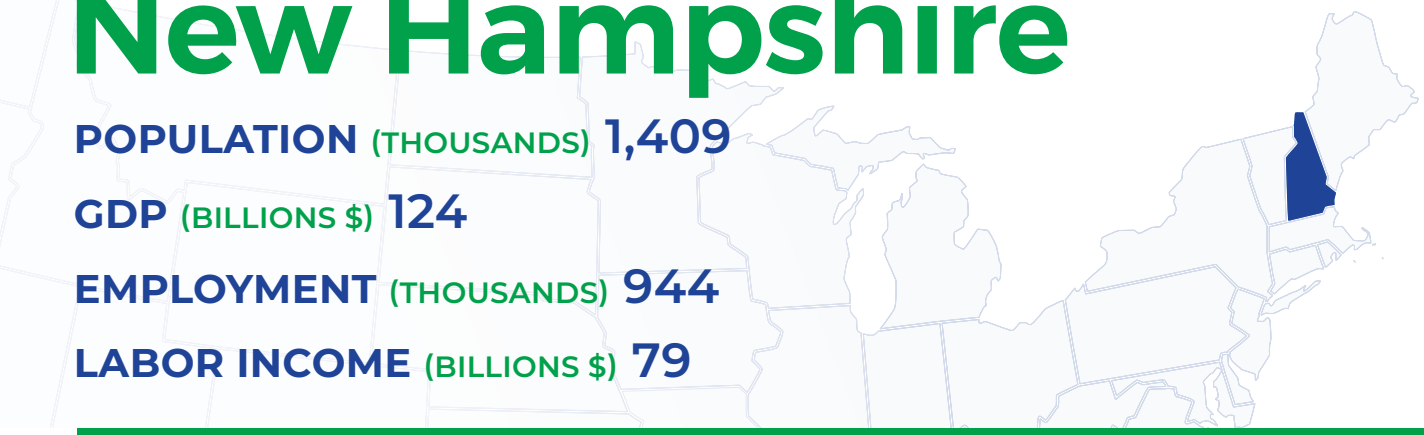
AVERAGE LABOR INCOME $93,143

Direct, Indirect, Induced Impacts

	DIRECT	INDIRECT	INDUCED	TOTAL
EMPLOYMENT (PERSONS)	525	477	278	1,281
LABOR INCOME (MILLIONS $)	48.9	31.3	17.4	97.6
VALUE ADDED (MILLIONS $)	91.6	51.2	36.9	179.7
OUTPUT (MILLIONS $)	182.3	86.8	57.9	327.1
TOTAL TAX RECEIPTS (ALL LEVELS, MILLIONS $)	25.4	11.0	8.8	45.1

EMPLOYMENT Multiplier	LABOR INCOME Multiplier	VALUE ADDED Multiplier	OUTPUT Multiplier
2.4	2.0	2.0	1.8

New Hampshire



POPULATION (THOUSANDS) 1,409

GDP (BILLIONS $) 124

EMPLOYMENT (THOUSANDS) 944

LABOR INCOME (BILLIONS $) 79

Convenience Distribution Direct Economic Contribution

EMPLOYMENT (PERSONS)	LABOR INCOME (MILLIONS $)	VALUE ADDED (MILLIONS $)	OUTPUT (MILLIONS $)
278	31.5	64.5	114.1

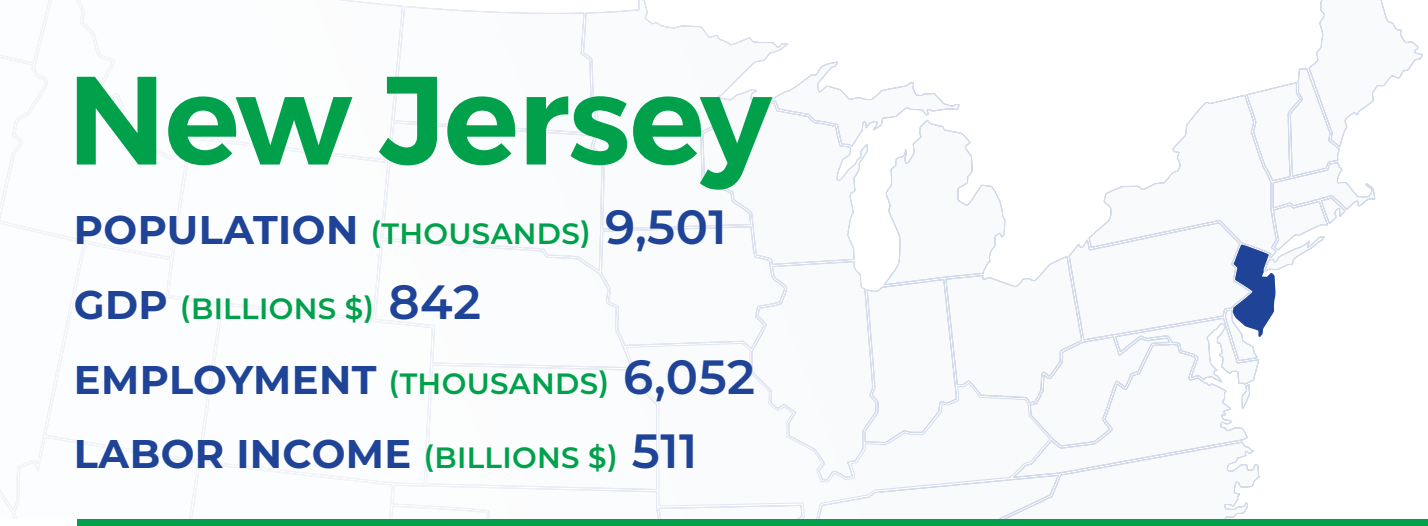
AVERAGE LABOR INCOME $113,453

Direct, Indirect, Induced Impacts

	DIRECT	INDIRECT	INDUCED	TOTAL
EMPLOYMENT (PERSONS)	278	214	161	653
LABOR INCOME (MILLIONS $)	31.5	17.5	12.0	61.1
VALUE ADDED (MILLIONS $)	64.5	25.9	22.3	112.6
OUTPUT (MILLIONS $)	114.1	42.0	34.2	190.4
TOTAL TAX RECEIPTS (ALL LEVELS, MILLIONS $)	12.5	5.4	4.8	22.7

EMPLOYMENT Multiplier	LABOR INCOME Multiplier	VALUE ADDED Multiplier	OUTPUT Multiplier
2.3	1.9	1.7	1.7

New Jersey



POPULATION (THOUSANDS) 9,501

GDP (BILLIONS $) 842

EMPLOYMENT (THOUSANDS) 6,052

LABOR INCOME (BILLIONS $) 511

Convenience Distribution Direct Economic Contribution

EMPLOYMENT (PERSONS)	LABOR INCOME (MILLIONS $)	VALUE ADDED (MILLIONS $)	OUTPUT (MILLIONS $)
3,159	397.9	749.6	1,341.6

AVERAGE LABOR INCOME $125,951

Direct, Indirect, Induced Impacts

	DIRECT	INDIRECT	INDUCED	TOTAL
EMPLOYMENT (PERSONS)	3,159	2,733	2,165	8,057
LABOR INCOME (MILLIONS $)	397.9	244.0	162.3	804.2
VALUE ADDED (MILLIONS $)	749.6	364.8	296.3	1,410.6
OUTPUT (MILLIONS $)	1,341.6	589.8	457.9	2,389.3
TOTAL TAX RECEIPTS (ALL LEVELS, MILLIONS $)	215.2	86.5	73.3	374.9

EMPLOYMENT Multiplier	LABOR INCOME Multiplier	VALUE ADDED Multiplier	OUTPUT Multiplier
2.6	2.0	1.9	1.8

New Mexico

POPULATION (THOUSANDS) 2,130

GDP (BILLIONS $) 154

EMPLOYMENT (THOUSANDS) 1,193

LABOR INCOME (BILLIONS $) 79

Convenience Distribution Direct Economic Contribution

EMPLOYMENT (PERSONS)	LABOR INCOME (MILLIONS $)	VALUE ADDED (MILLIONS $)	OUTPUT (MILLIONS $)
288	20.3	36.4	84.9

AVERAGE LABOR INCOME $70,347

Direct, Indirect, Induced Impacts

	DIRECT	INDIRECT	INDUCED	TOTAL
EMPLOYMENT (PERSONS)	288	198	100	587
LABOR INCOME (MILLIONS $)	20.3	10.6	5.5	36.3
VALUE ADDED (MILLIONS $)	36.4	17.7	11.5	65.6
OUTPUT (MILLIONS $)	84.9	32.4	19.0	136.3
TOTAL TAX RECEIPTS (ALL LEVELS, MILLIONS $)	8.8	3.8	2.7	15.3

EMPLOYMENT Multiplier	LABOR INCOME Multiplier	VALUE ADDED Multiplier	OUTPUT Multiplier
2.0	1.8	1.8	1.6

New York

POPULATION (THOUSANDS) 19,867

GDP (BILLIONS $) 2,273

EMPLOYMENT (THOUSANDS) 13,360

LABOR INCOME (BILLIONS $) 1,308

Convenience Distribution Direct Economic Contribution

EMPLOYMENT (PERSONS)	LABOR INCOME (MILLIONS $)	VALUE ADDED (MILLIONS $)	OUTPUT (MILLIONS $)
4,922	552.7	1,069.4	1,973.6

AVERAGE LABOR INCOME $112,288

Direct, Indirect, Induced Impacts

	DIRECT	INDIRECT	INDUCED	TOTAL
EMPLOYMENT (PERSONS)	4,922	3,742	2,707	11,372
LABOR INCOME (MILLIONS $)	552.7	342.3	222.1	1,117.1
VALUE ADDED (MILLIONS $)	1,069.4	564.0	412.8	2,046.2
OUTPUT (MILLIONS $)	1,973.6	866.5	603.9	3,444.0
TOTAL TAX RECEIPTS (ALL LEVELS, MILLIONS $)	302.5	125.2	100.3	528.0

EMPLOYMENT Multiplier	LABOR INCOME Multiplier	VALUE ADDED Multiplier	OUTPUT Multiplier
2.3	2.0	1.9	1.7

North Carolina

POPULATION (THOUSANDS) 11,046

GDP (BILLIONS $) 850

EMPLOYMENT (THOUSANDS) 6,882

LABOR INCOME (BILLIONS $) 492

Convenience Distribution Direct Economic Contribution

EMPLOYMENT (PERSONS)	LABOR INCOME (MILLIONS $)	VALUE ADDED (MILLIONS $)	OUTPUT (MILLIONS $)
2,181	212.5	430.3	831.3

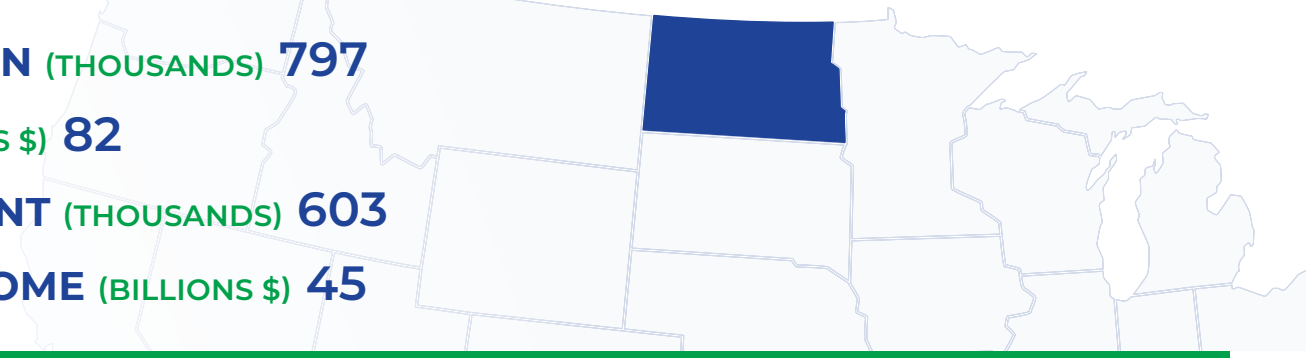
AVERAGE LABOR INCOME $97,409

Direct, Indirect, Induced Impacts

	DIRECT	INDIRECT	INDUCED	TOTAL
EMPLOYMENT (PERSONS)	2,181	2,096	1,354	5,631
LABOR INCOME (MILLIONS $)	212.5	147.1	84.6	444.1
VALUE ADDED (MILLIONS $)	430.3	223.5	167.4	821.1
OUTPUT (MILLIONS $)	831.3	390.5	271.1	1,492.9
TOTAL TAX RECEIPTS (ALL LEVELS, MILLIONS $)	100.7	46.9	35.6	183.2

EMPLOYMENT Multiplier	LABOR INCOME Multiplier	VALUE ADDED Multiplier	OUTPUT Multiplier
2.6	2.1	1.9	1.8

North Dakota



POPULATION (THOUSANDS) 797

GDP (BILLIONS $) 82

EMPLOYMENT (THOUSANDS) 603

LABOR INCOME (BILLIONS $) 45

Convenience Distribution Direct Economic Contribution

EMPLOYMENT (PERSONS)	LABOR INCOME (MILLIONS $)	VALUE ADDED (MILLIONS $)	OUTPUT (MILLIONS $)
273	30.0	52.6	101.1

AVERAGE LABOR INCOME $109,707

Direct, Indirect, Induced Impacts

	DIRECT	INDIRECT	INDUCED	TOTAL
EMPLOYMENT (PERSONS)	273	176	134	584
LABOR INCOME (MILLIONS $)	30.0	11.6	8.3	49.8
VALUE ADDED (MILLIONS $)	52.6	17.5	14.5	84.6
OUTPUT (MILLIONS $)	101.1	33.2	25.0	159.4
TOTAL TAX RECEIPTS (ALL LEVELS, MILLIONS $)	10.3	3.1	2.7	16.2

EMPLOYMENT Multiplier	LABOR INCOME Multiplier	VALUE ADDED Multiplier	OUTPUT Multiplier
2.1	1.7	1.6	1.6

Ohio

POPULATION (THOUSANDS) 11,883

GDP (BILLIONS $) 926

EMPLOYMENT (THOUSANDS) 7,527

LABOR INCOME (BILLIONS $) 517

Convenience Distribution Direct Economic Contribution

EMPLOYMENT (PERSONS)	LABOR INCOME (MILLIONS $)	VALUE ADDED (MILLIONS $)	OUTPUT (MILLIONS $)
2,418	248.9	499.1	934.4

AVERAGE LABOR INCOME $102,936

Direct, Indirect, Induced Impacts

	DIRECT	INDIRECT	INDUCED	TOTAL
EMPLOYMENT (PERSONS)	2,418	2,284	1,792	6,494
LABOR INCOME (MILLIONS $)	248.9	151.2	105.7	505.7
VALUE ADDED (MILLIONS $)	499.1	244.3	205.3	948.8
OUTPUT (MILLIONS $)	934.4	421.0	338.2	1,693.6
TOTAL TAX RECEIPTS (ALL LEVELS, MILLIONS $)	111.1	48.3	44.8	204.2

EMPLOYMENT Multiplier	LABOR INCOME Multiplier	VALUE ADDED Multiplier	OUTPUT Multiplier
2.7	2.0	1.9	1.8

Oklahoma

POPULATION (THOUSANDS) 4,095

GDP (BILLIONS $) 273

EMPLOYMENT (THOUSANDS) 2,493

LABOR INCOME (BILLIONS $) 173

Convenience Distribution Direct Economic Contribution

EMPLOYMENT (PERSONS)	LABOR INCOME (MILLIONS $)	VALUE ADDED (MILLIONS $)	OUTPUT (MILLIONS $)
664	56.0	111.2	228.4

AVERAGE LABOR INCOME $84,277

Direct, Indirect, Induced Impacts

	DIRECT	INDIRECT	INDUCED	TOTAL
EMPLOYMENT (PERSONS)	664	604	317	1,585
LABOR INCOME (MILLIONS $)	56.0	35.3	17.8	109.1
VALUE ADDED (MILLIONS $)	111.2	54.4	34.3	200.0
OUTPUT (MILLIONS $)	228.4	104.0	60.3	392.7
TOTAL TAX RECEIPTS (ALL LEVELS, MILLIONS $)	24.0	10.9	7.2	42.1

EMPLOYMENT Multiplier	LABOR INCOME Multiplier	VALUE ADDED Multiplier	OUTPUT Multiplier
2.4	1.9	1.8	1.7

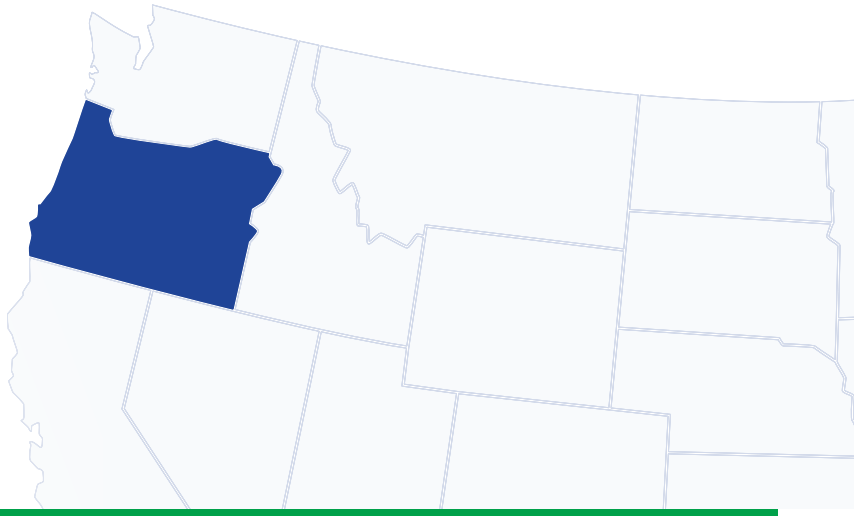
Oregon

POPULATION (THOUSANDS) 4,272

GDP (BILLIONS $) 333

EMPLOYMENT (THOUSANDS) 2,745

LABOR INCOME (BILLIONS $) 211



Convenience Distribution Direct Economic Contribution

EMPLOYMENT (PERSONS)	LABOR INCOME (MILLIONS $)	VALUE ADDED (MILLIONS $)	OUTPUT (MILLIONS $)
1,018	94.7	176.1	351.4

AVERAGE LABOR INCOME $92,996

Direct, Indirect, Induced Impacts

	DIRECT	INDIRECT	INDUCED	TOTAL
EMPLOYMENT (PERSONS)	1,018	901	606	2,525
LABOR INCOME (MILLIONS $)	94.7	65.3	40.6	200.6
VALUE ADDED (MILLIONS $)	176.1	96.2	73.2	345.5
OUTPUT (MILLIONS $)	351.4	165.2	116.9	633.5
TOTAL TAX RECEIPTS (ALL LEVELS, MILLIONS $)	41.7	20.9	15.9	78.5

EMPLOYMENT Multiplier	LABOR INCOME Multiplier	VALUE ADDED Multiplier	OUTPUT Multiplier
2.5	2.1	2.0	1.8

Pennsylvania

POPULATION (THOUSANDS) 13,079

GDP (BILLIONS $) 1,022

EMPLOYMENT (THOUSANDS) 8,163

LABOR INCOME (BILLIONS $) 636

Convenience Distribution Direct Economic Contribution

EMPLOYMENT (PERSONS)	LABOR INCOME (MILLIONS $)	VALUE ADDED (MILLIONS $)	OUTPUT (MILLIONS $)
2,067	204.6	468.1	841.1

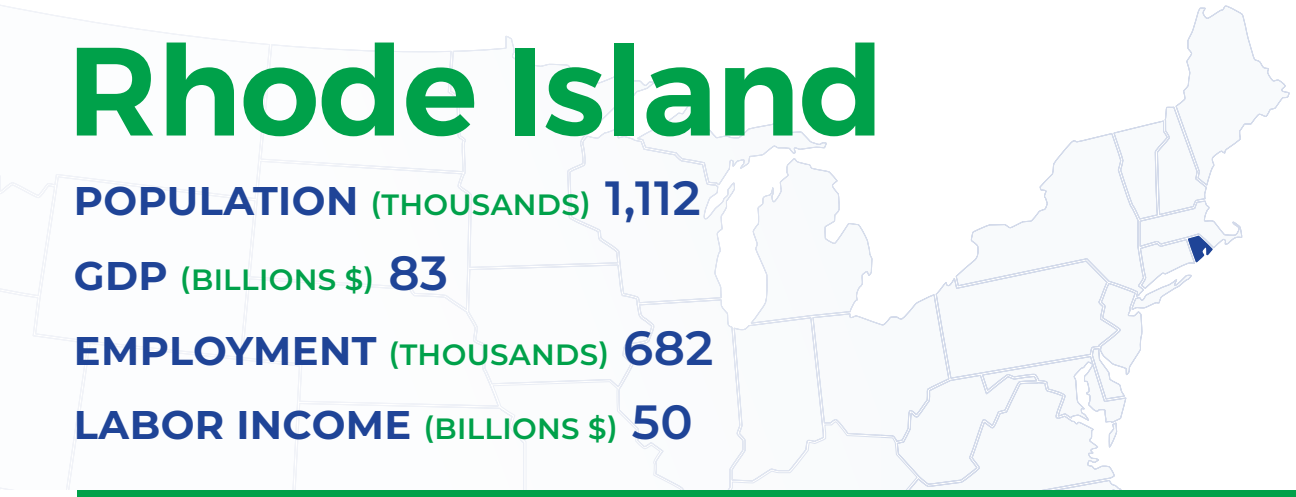
AVERAGE LABOR INCOME $98,984

Direct, Indirect, Induced Impacts

	DIRECT	INDIRECT	INDUCED	TOTAL
EMPLOYMENT (PERSONS)	2,067	1,786	1,486	5,339
LABOR INCOME (MILLIONS $)	204.6	141.1	101.9	447.6
VALUE ADDED (MILLIONS $)	468.1	207.6	180.2	855.9
OUTPUT (MILLIONS $)	841.1	351.1	290.7	1,482.9
TOTAL TAX RECEIPTS (ALL LEVELS, MILLIONS $)	111.2	45.9	41.4	198.5

EMPLOYMENT Multiplier	LABOR INCOME Multiplier	VALUE ADDED Multiplier	OUTPUT Multiplier
2.6	2.2	1.8	1.8

Rhode Island



POPULATION (THOUSANDS) 1,112

GDP (BILLIONS $) 83

EMPLOYMENT (THOUSANDS) 682

LABOR INCOME (BILLIONS $) 50

Convenience Distribution Direct Economic Contribution

EMPLOYMENT (PERSONS)	LABOR INCOME (MILLIONS $)	VALUE ADDED (MILLIONS $)	OUTPUT (MILLIONS $)
184	17.3	37.3	69.3

AVERAGE LABOR INCOME $94,076

Direct, Indirect, Induced Impacts

	DIRECT	INDIRECT	INDUCED	TOTAL
EMPLOYMENT (PERSONS)	184	155	102	440
LABOR INCOME (MILLIONS $)	17.3	10.6	6.7	34.5
VALUE ADDED (MILLIONS $)	37.3	16.0	12.4	65.7
OUTPUT (MILLIONS $)	69.3	27.5	19.6	116.4
TOTAL TAX RECEIPTS (ALL LEVELS, MILLIONS $)	10.1	3.6	3.0	16.7

EMPLOYMENT Multiplier	LABOR INCOME Multiplier	VALUE ADDED Multiplier	OUTPUT Multiplier
2.4	2.0	1.8	1.7

South Carolina

POPULATION (THOUSANDS) 5,479

GDP (BILLIONS $) 363

EMPLOYMENT (THOUSANDS) 3,196

LABOR INCOME (BILLIONS $) 200

Convenience Distribution Direct Economic Contribution

EMPLOYMENT (PERSONS)	LABOR INCOME (MILLIONS $)	VALUE ADDED (MILLIONS $)	OUTPUT (MILLIONS $)
760	69.6	167.8	300.1

AVERAGE LABOR INCOME $91,592

Direct, Indirect, Induced Impacts

	DIRECT	INDIRECT	INDUCED	TOTAL
EMPLOYMENT (PERSONS)	760	698	402	1,860
LABOR INCOME (MILLIONS $)	69.6	41.0	21.3	132.0
VALUE ADDED (MILLIONS $)	167.8	63.4	46.8	278.0
OUTPUT (MILLIONS $)	300.1	116.4	76.1	492.6
TOTAL TAX RECEIPTS (ALL LEVELS, MILLIONS $)	47.6	13.6	11.0	72.1

EMPLOYMENT Multiplier	LABOR INCOME Multiplier	VALUE ADDED Multiplier	OUTPUT Multiplier
2.4	1.9	1.7	1.6

South Dakota

POPULATION (THOUSANDS) 925

GDP (BILLIONS $) 79

EMPLOYMENT (THOUSANDS) 665

LABOR INCOME (BILLIONS $) 46

Convenience Distribution Direct Economic Contribution

EMPLOYMENT (PERSONS)	LABOR INCOME (MILLIONS $)	VALUE ADDED (MILLIONS $)	OUTPUT (MILLIONS $)
262	25.4	48.9	97.4

AVERAGE LABOR INCOME $96,908

Direct, Indirect, Induced Impacts

	DIRECT	INDIRECT	INDUCED	TOTAL
EMPLOYMENT (PERSONS)	262	193	124	579
LABOR INCOME (MILLIONS $)	25.4	12.5	7.4	45.3
VALUE ADDED (MILLIONS $)	48.9	19.3	13.9	82.1
OUTPUT (MILLIONS $)	97.4	35.8	23.3	156.4
TOTAL TAX RECEIPTS (ALL LEVELS, MILLIONS $)	10.4	3.6	2.8	16.8

EMPLOYMENT Multiplier	LABOR INCOME Multiplier	VALUE ADDED Multiplier	OUTPUT Multiplier
2.2	1.8	1.7	1.6

Tennessee

POPULATION (THOUSANDS) 7,228

GDP (BILLIONS $) 568

EMPLOYMENT (THOUSANDS) 4,642

LABOR INCOME (BILLIONS $) 345

Convenience Distribution Direct Economic Contribution

EMPLOYMENT (PERSONS)	LABOR INCOME (MILLIONS $)	VALUE ADDED (MILLIONS $)	OUTPUT (MILLIONS $)
1,504	155.6	327.2	608.5

AVERAGE LABOR INCOME $103,457

Direct, Indirect, Induced Impacts

	DIRECT	INDIRECT	INDUCED	TOTAL
EMPLOYMENT (PERSONS)	1,504	1,305	964	3,774
LABOR INCOME (MILLIONS $)	155.6	104.1	66.9	326.5
VALUE ADDED (MILLIONS $)	327.2	152.4	123.9	603.5
OUTPUT (MILLIONS $)	608.5	263.1	198.5	1,070.1
TOTAL TAX RECEIPTS (ALL LEVELS, MILLIONS $)	78.4	30.3	27.3	135.9

EMPLOYMENT Multiplier	LABOR INCOME Multiplier	VALUE ADDED Multiplier	OUTPUT Multiplier
2.5	2.1	1.8	1.8

Texas

POPULATION (THOUSANDS) 31,291

GDP (BILLIONS $) 2,779

EMPLOYMENT (THOUSANDS) 20,590

LABOR INCOME (BILLIONS $) 1,576

Convenience Distribution Direct Economic Contribution

EMPLOYMENT (PERSONS)	LABOR INCOME (MILLIONS $)	VALUE ADDED (MILLIONS $)	OUTPUT (MILLIONS $)
6,312	653.1	1,445.2	2,566.4

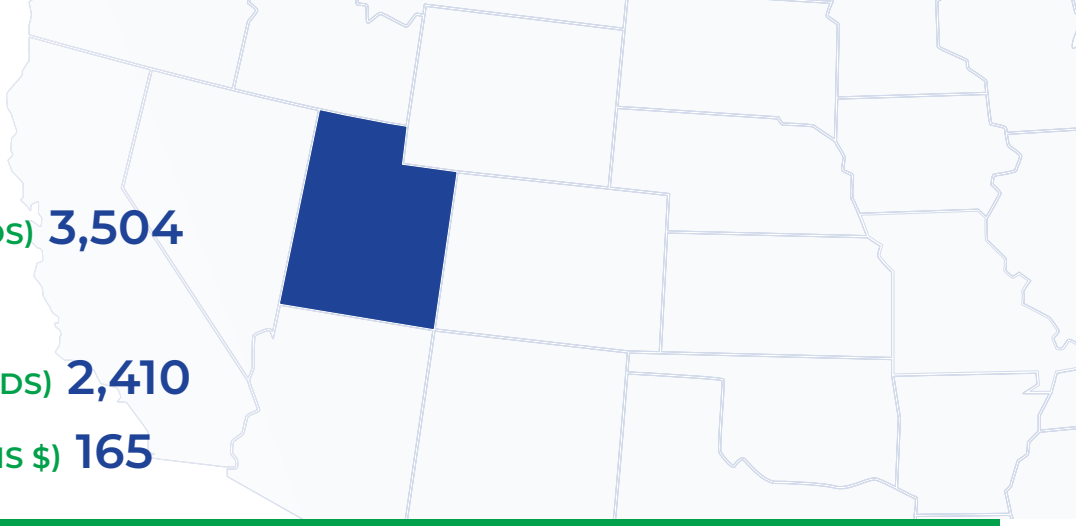
AVERAGE LABOR INCOME $103,476

Direct, Indirect, Induced Impacts

	DIRECT	INDIRECT	INDUCED	TOTAL
EMPLOYMENT (PERSONS)	6,312	6,052	4,567	16,931
LABOR INCOME (MILLIONS $)	653.1	429.0	288.9	1,371.0
VALUE ADDED (MILLIONS $)	1,445.2	675.7	559.0	2,679.9
OUTPUT (MILLIONS $)	2,566.4	1,193.7	934.2	4,694.3
TOTAL TAX RECEIPTS (ALL LEVELS, MILLIONS $)	238.8	130.7	117.8	487.3

EMPLOYMENT Multiplier	LABOR INCOME Multiplier	VALUE ADDED Multiplier	OUTPUT Multiplier
2.7	2.1	1.9	1.8

Utah



POPULATION (THOUSANDS) 3,504

GDP (BILLIONS $) 301

EMPLOYMENT (THOUSANDS) 2,410

LABOR INCOME (BILLIONS $) 165

Convenience Distribution Direct Economic Contribution

EMPLOYMENT (PERSONS)	LABOR INCOME (MILLIONS $)	VALUE ADDED (MILLIONS $)	OUTPUT (MILLIONS $)
693	64.9	126.1	250.7

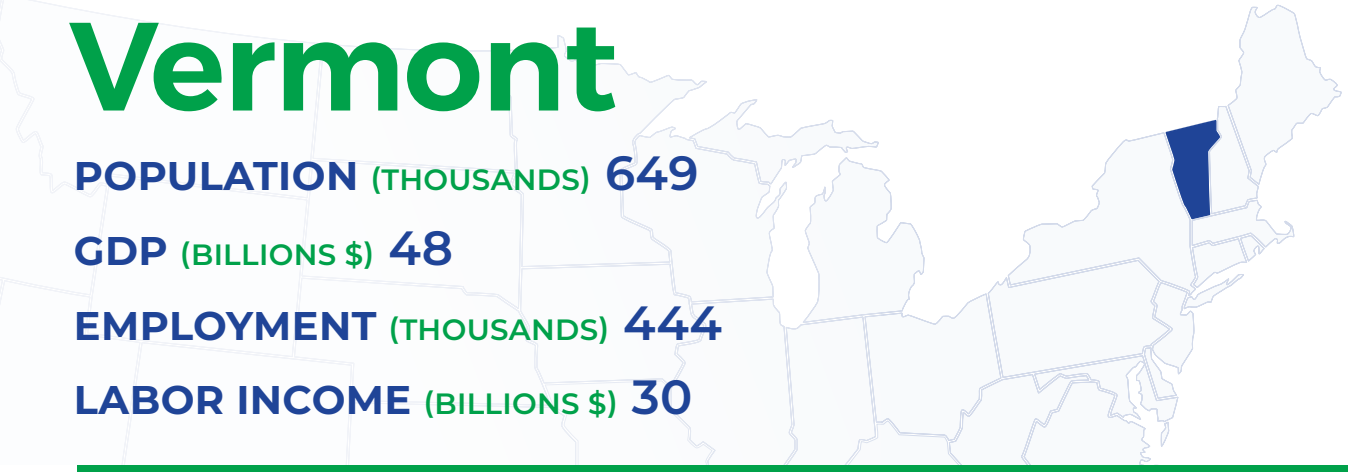
AVERAGE LABOR INCOME $93,636

Direct, Indirect, Induced Impacts

	DIRECT	INDIRECT	INDUCED	TOTAL
EMPLOYMENT (PERSONS)	693	658	427	1,778
LABOR INCOME (MILLIONS $)	64.9	41.7	25.3	131.9
VALUE ADDED (MILLIONS $)	126.1	69.2	54.2	249.5
OUTPUT (MILLIONS $)	250.7	124.2	88.9	463.8
TOTAL TAX RECEIPTS (ALL LEVELS, MILLIONS $)	29.9	13.3	11.6	54.7

EMPLOYMENT Multiplier	LABOR INCOME Multiplier	VALUE ADDED Multiplier	OUTPUT Multiplier
2.6	2.0	2.0	1.9

Vermont



POPULATION (THOUSANDS) 649

GDP (BILLIONS $) 48

EMPLOYMENT (THOUSANDS) 444

LABOR INCOME (BILLIONS $) 30

Convenience Distribution Direct Economic Contribution

EMPLOYMENT (PERSONS)	LABOR INCOME (MILLIONS $)	VALUE ADDED (MILLIONS $)	OUTPUT (MILLIONS $)
156	13.6	25.0	52.8

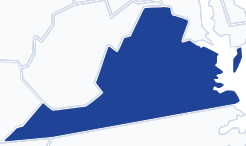
AVERAGE LABOR INCOME $86,859

Direct, Indirect, Induced Impacts

	DIRECT	INDIRECT	INDUCED	TOTAL
EMPLOYMENT (PERSONS)	156	100	77	333
LABOR INCOME (MILLIONS $)	13.6	7.1	4.8	25.4
VALUE ADDED (MILLIONS $)	25.0	11.0	9.1	45.1
OUTPUT (MILLIONS $)	52.8	19.4	14.7	87.0
TOTAL TAX RECEIPTS (ALL LEVELS, MILLIONS $)	5.9	2.5	2.2	10.6

EMPLOYMENT Multiplier	LABOR INCOME Multiplier	VALUE ADDED Multiplier	OUTPUT Multiplier
2.1	1.9	1.8	1.6

Virginia



POPULATION (THOUSANDS) 8,811

GDP (BILLIONS $) 771

EMPLOYMENT (THOUSANDS) 5,835

LABOR INCOME (BILLIONS $) 462

Convenience Distribution Direct Economic Contribution

EMPLOYMENT (PERSONS)	LABOR INCOME (MILLIONS $)	VALUE ADDED (MILLIONS $)	OUTPUT (MILLIONS $)
1,095	100.1	239.7	436.1

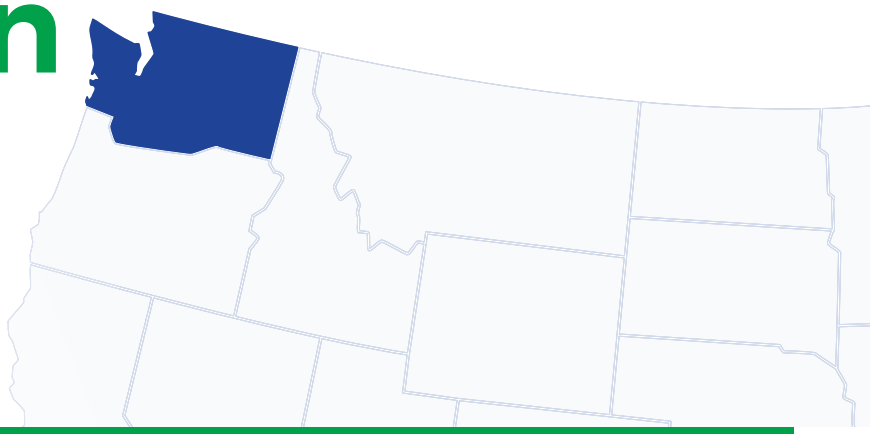
AVERAGE LABOR INCOME $91,416

Direct, Indirect, Induced Impacts

	DIRECT	INDIRECT	INDUCED	TOTAL
EMPLOYMENT (PERSONS)	1,095	1,012	586	2,694
LABOR INCOME (MILLIONS $)	100.1	73.9	36.8	210.7
VALUE ADDED (MILLIONS $)	239.7	113.7	74.5	427.9
OUTPUT (MILLIONS $)	436.1	187.0	117.0	740.1
TOTAL TAX RECEIPTS (ALL LEVELS, MILLIONS $)	58.3	24.0	17.1	99.4

EMPLOYMENT Multiplier	LABOR INCOME Multiplier	VALUE ADDED Multiplier	OUTPUT Multiplier
2.5	2.1	1.8	1.7

Washington



POPULATION (THOUSANDS) 7,958

GDP (BILLIONS $) 860

EMPLOYMENT (THOUSANDS) 4,915

LABOR INCOME (BILLIONS $) 485

Convenience Distribution Direct Economic Contribution

EMPLOYMENT (PERSONS)	LABOR INCOME (MILLIONS $)	VALUE ADDED (MILLIONS $)	OUTPUT (MILLIONS $)
1,765	173.6	372.0	667.1

AVERAGE LABOR INCOME $98,334

Direct, Indirect, Induced Impacts

	DIRECT	INDIRECT	INDUCED	TOTAL
EMPLOYMENT (PERSONS)	1,765	1,368	930	4,064
LABOR INCOME (MILLIONS $)	173.6	142.1	74.8	390.4
VALUE ADDED (MILLIONS $)	372.0	181.3	155.7	709.0
OUTPUT (MILLIONS $)	667.1	292.6	233.8	1,193.5
TOTAL TAX RECEIPTS (ALL LEVELS, MILLIONS $)	93.1	44.4	35.0	172.5

EMPLOYMENT Multiplier	LABOR INCOME Multiplier	VALUE ADDED Multiplier	OUTPUT Multiplier
2.3	2.2	1.9	1.8

West Virginia

POPULATION (THOUSANDS) 1,770

GDP (BILLIONS $) 110

EMPLOYMENT (THOUSANDS) 917

LABOR INCOME (BILLIONS $) 59

Convenience Distribution Direct Economic Contribution

EMPLOYMENT (PERSONS)	LABOR INCOME (MILLIONS $)	VALUE ADDED (MILLIONS $)	OUTPUT (MILLIONS $)
181	15.7	34.1	68.6

AVERAGE LABOR INCOME $86,796

Direct, Indirect, Induced Impacts

	DIRECT	INDIRECT	INDUCED	TOTAL
EMPLOYMENT (PERSONS)	181	134	80	395
LABOR INCOME (MILLIONS $)	15.7	7.8	4.6	28.0
VALUE ADDED (MILLIONS $)	34.1	11.7	8.6	54.4
OUTPUT (MILLIONS $)	68.6	21.2	14.3	104.2
TOTAL TAX RECEIPTS (ALL LEVELS, MILLIONS $)	6.8	2.4	2.0	11.1

EMPLOYMENT Multiplier	LABOR INCOME Multiplier	VALUE ADDED Multiplier	OUTPUT Multiplier
2.2	1.8	1.6	1.5

Wisconsin

POPULATION (THOUSANDS) 5,961

GDP (BILLIONS $) 458

EMPLOYMENT (THOUSANDS) 3,834

LABOR INCOME (BILLIONS $) 268

Convenience Distribution Direct Economic Contribution

EMPLOYMENT (PERSONS)	LABOR INCOME (MILLIONS $)	VALUE ADDED (MILLIONS $)	OUTPUT (MILLIONS $)
1,544	145.6	268.8	537.2

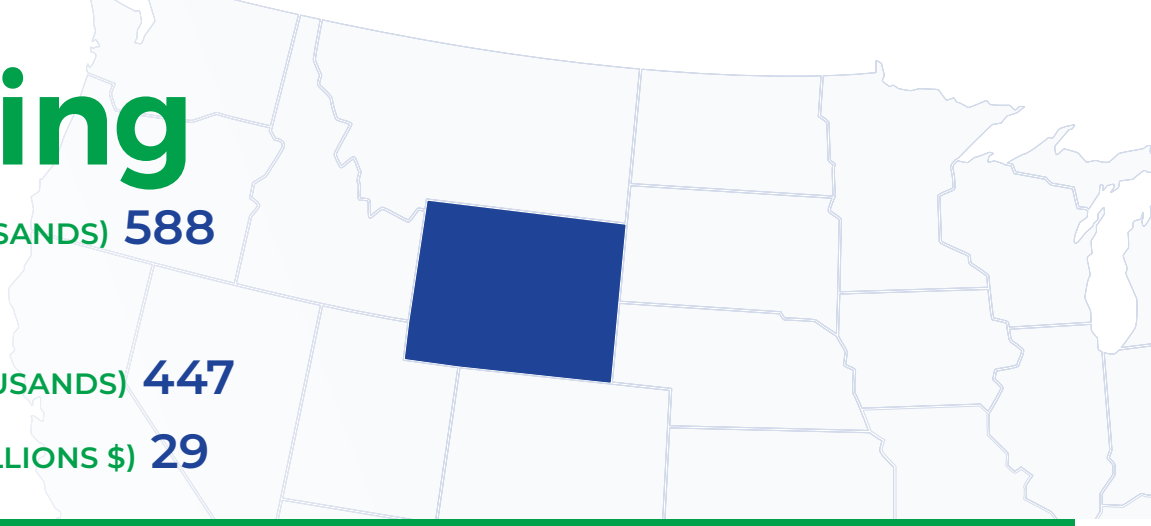
AVERAGE LABOR INCOME $94,275

Direct, Indirect, Induced Impacts

	DIRECT	INDIRECT	INDUCED	TOTAL
EMPLOYMENT (PERSONS)	1,544	1,210	939	3,693
LABOR INCOME (MILLIONS $)	145.6	84.8	58.0	288.3
VALUE ADDED (MILLIONS $)	268.8	132.7	111.7	513.2
OUTPUT (MILLIONS $)	537.2	236.6	182.6	956.3
TOTAL TAX RECEIPTS (ALL LEVELS, MILLIONS $)	63.4	29.1	25.6	118.1

EMPLOYMENT Multiplier	LABOR INCOME Multiplier	VALUE ADDED Multiplier	OUTPUT Multiplier
2.4	2.0	1.9	1.8

Wyoming



POPULATION (THOUSANDS) 588

GDP (BILLIONS $) 53

EMPLOYMENT (THOUSANDS) 447

LABOR INCOME (BILLIONS $) 29

Convenience Distribution Direct Economic Contribution

EMPLOYMENT (PERSONS)	LABOR INCOME (MILLIONS $)	VALUE ADDED (MILLIONS $)	OUTPUT (MILLIONS $)
90	6.3	10.8	26.1

AVERAGE LABOR INCOME $69,444

Direct, Indirect, Induced Impacts

	DIRECT	INDIRECT	INDUCED	TOTAL
EMPLOYMENT (PERSONS)	90	57	24	170
LABOR INCOME (MILLIONS $)	6.3	2.9	1.1	10.2
VALUE ADDED (MILLIONS $)	10.8	4.6	2.4	17.9
OUTPUT (MILLIONS $)	26.1	9.6	4.3	40.0
TOTAL TAX RECEIPTS (ALL LEVELS, MILLIONS $)	2.4	0.9	0.5	3.9

EMPLOYMENT Multiplier	LABOR INCOME Multiplier	VALUE ADDED Multiplier	OUTPUT Multiplier
1.9	1.6	1.7	1.5

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