



EMA Foundation's 2023 Mailing Industry Economic Job Study Jobs and Sales Revenue by State

THE U.S. MAILING INDUSTRY IS AN ECONOMIC POWERHOUSE WITH 7.9 MILLION JOBS AND \$1.9 TRILLION IN SALES REVENUE

Mailing Industry Overall

- The U.S. mailing industry's 7.9 million jobs represent 5.0% of the nation's total civilian labor force.
- The mailing industry influences every private and public sector of the economy and provides jobs in every state and congressional district.
- Overall mailing industry jobs increased by 8.0%, totaling 584,013 jobs, from 2018 to 2022 due to more packaged products being delivered through the mail stream, resulting in an increase in employment in private sector couriers and their suppliers.
- From 2018 to 2022, traditional mail jobs dropped by 7%, totaling a loss of 409,400 jobs, whereas packaging jobs grew by 65% or almost 1 million jobs.

Jobs Declined Significantly in the Traditional Mail Industry and Grew in Packaging

- Decline in Jobs
 - ↓ Paper, Printing, Printing Industry Suppliers, and Direct Mail Design
 - ↓ Mail Management in all Industries
 - ↓ Traditional Direct Mail, Catalog, and Magazine
- Growth in Jobs
 - ↑ Private Sector Delivery Services (e.g. Fed-ex, UPS, last-mile services)
 - ↑ Delivery Suppliers
 - ↑ Internet Shopping and Mail Order Houses (e.g. Amazon)
 - ↑ Brick and Mortar Retailers Fulfilling Sales through the Mail Stream

Traditional Mail Jobs Are At Risk

- Traditional mail volume consisting of bills & statements and marketing mail has declined substantially.
- With the loss of overall mail volume from 2018 to 2022,
 - Jobs from paper, printing, printing industry suppliers, & mail manufacturing fell by 9%,
 - Jobs associated with handling letters and packages in businesses have declined by 22%, and
 - Jobs generated by catalog, direct mail, magazine ads, inserts, and mail-related publishing dropped by 4%.

Packaging and Courier Jobs Growing More Competitive

- Most of the job increase is due to the growth in parcel delivery.
- Private sector delivery jobs (UPS, FedEx, last mile delivery services, etc.) have grown by 57% since 2018.
- This trend was likely accelerated by the pandemic, online shopping, and working from home.

Mailing Industry Revenue

- The U.S. mailing industry contributes 4.1% or \$1.9 Trillion in sales revenue to the U.S. economy.
- Mailing industry revenues include dollars received by the USPS and other carriers, revenues received by suppliers of mailing services (such as envelopes, paper suppliers, and printers) and sales of goods and services by direct mail and catalog marketers resulting from their mail-based advertising.

About the Study

- The study is available on the EMA Foundation's website at: <https://www.envelope.org/emaf/institute-for-postal-studies>
- For more information, please contact Marie Clarke, EMA President, at 703-739-2200 or mclarke@envelope.org

EMA Foundation's 2023 Mailing Industry Economic Job Study

Jobs and Sales Revenue by State

	STATE	JOBS	REVENUE (\$ BILLIONS)		STATE	JOBS	REVENUE (\$ BILLIONS)
1	Alabama	119,963	\$20.49	26	Missouri	146,820	\$29.74
2	Alaska	17,439	\$4.62	27	Montana	26,285	\$4.94
3	Arizona	173,196	\$34.28	28	Nebraska	46,741	\$12.28
4	Arkansas	72,024	\$11.96	29	Nevada	74,836	\$16.26
5	California	933,970	\$279.04	30	New Hampshire	33,062	\$8.13
6	Colorado	138,344	\$35.16	31	New Jersey	220,584	\$55.81
7	Connecticut	85,823	\$24.63	32	New Mexico	50,364	\$9.17
8	Delaware	23,883	\$6.70	33	New York	472,150	\$151.48
9	District of Columbia	15,949	\$12.44	34	North Carolina	251,147	\$54.61
10	Florida	518,452	\$103.64	35	North Dakota	18,446	\$5.26
11	Georgia	257,060	\$56.92	36	Ohio	280,397	\$60.99
12	Hawaii	34,313	\$7.57	37	Oklahoma	94,893	\$17.46
13	Idaho	45,247	\$7.81	38	Oregon	101,070	\$22.24
14	Illinois	301,616	\$77.57	39	Pennsylvania	308,581	\$69.76
15	Indiana	162,001	\$34.92	40	Rhode Island	26,079	\$5.50
16	Iowa	76,004	\$18.02	41	South Carolina	123,553	\$22.48
17	Kansas	69,851	\$15.79	42	South Dakota	21,312	\$5.02
18	Kentucky	107,336	\$19.45	43	Tennessee	166,030	\$35.00
19	Louisiana	110,065	\$21.29	44	Texas	702,848	\$167.42
20	Maine	32,663	\$6.30	45	Utah	79,453	\$18.34
21	Maryland	146,747	\$36.04	46	Vermont	15,366	\$3.03
22	Massachusetts	166,256	\$52.94	47	Virginia	205,710	\$49.03
23	Michigan	239,237	\$47.20	48	Washington	184,203	\$55.57
24	Minnesota	135,852	\$34.20	49	West Virginia	42,439	\$7.33
25	Mississippi	70,217	\$10.36	50	Wisconsin	140,339	\$30.30
				51	Wyoming	13,777	\$3.51

Prepared by Cheryl Chapman of Sylvamo and Chair of the EMA Foundation's Institute of Postal Studies and Peter Johnson, PhD, Principal, emergentMeasures Research

The 2023 U.S. Mailing Industry Economic Job and Revenue Study is available on the EMA Foundation's website at <https://www.envelope.org/ema/institute-for-postal-studies>. This study analyzes the most recent information collected by U.S. Bureau of Labor Statistics in its Occupation Employment Statistics program on employment by occupation and industry, U.S. Census Bureau, United States Postal Service, and Department of Commerce's Bureau of Economic Affairs. EMA is the world's largest association devoted to the envelope manufacturing and paper-based communications industry.