

New Hampshire Economic Conditions

April 2014

New Hampshire's Maple Syrup Production

New Hampshire produced 124,000 gallons of maple syrup in 2013, up 63.2 percent from 2012, or 48,000 gallons. That represented four percent of the total national maple syrup production, and was the third largest production among New England states.¹ Vermont produced the most maple syrup with 1,320,000 gallons. The difference in the states' geographies may contribute to the differences in production, with the majority of New Hampshire's terrain in the south, while Vermont is the opposite. Among the ten states that report to the U.S. Department of Agriculture, production of maple syrup overall increased over 70 percent from 2012 to 2013. In 2012, New Hampshire produced 76,000 gallons of maple syrup, contributing just shy of \$4.0 million to the state's economy.²

In 2013, an average of about 44 gallons of sap was needed to produce one gallon of maple syrup. New Hampshire sugar houses reported using 48 gallons of sap to produce one gallon of syrup.

Optimal weather for collecting maple sap is daytime temperatures around 40° F and night time temperatures around 20° F. As of late March 2014, the days, although

sunny, rarely reached above freezing and many nights hovered close to zero degrees. In the last four years, the latest day recorded for the first sap collected was February 14, 2011 (2010 – 2011 sap collecting season). If temperatures abruptly jump to 70° days and 50° nights with an extended heat wave, the sap season would be shortened.

Compared to other years, this year has been much colder for an extended period. According to national weather records, the high level of heating degree days so far in the current season (2013 – 2014) confirms why it has been difficult getting sap lines

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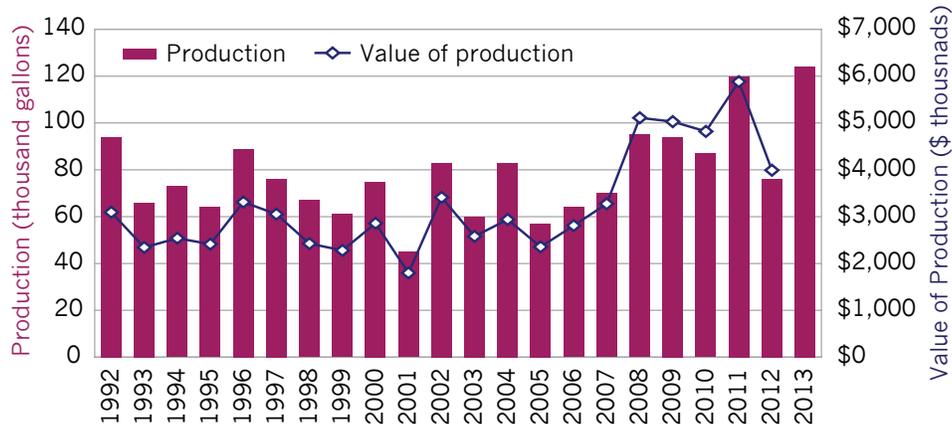
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New Hampshire Maple Syrup Stock - Value and Production



Source: United States Department of Agriculture, National Agricultural Statistics Service. June 2013. News Release – Maple Syrup Production.

¹. United States Department of Agriculture, National Agricultural Statistics Service. June 2013. News Release – Maple Syrup Production.

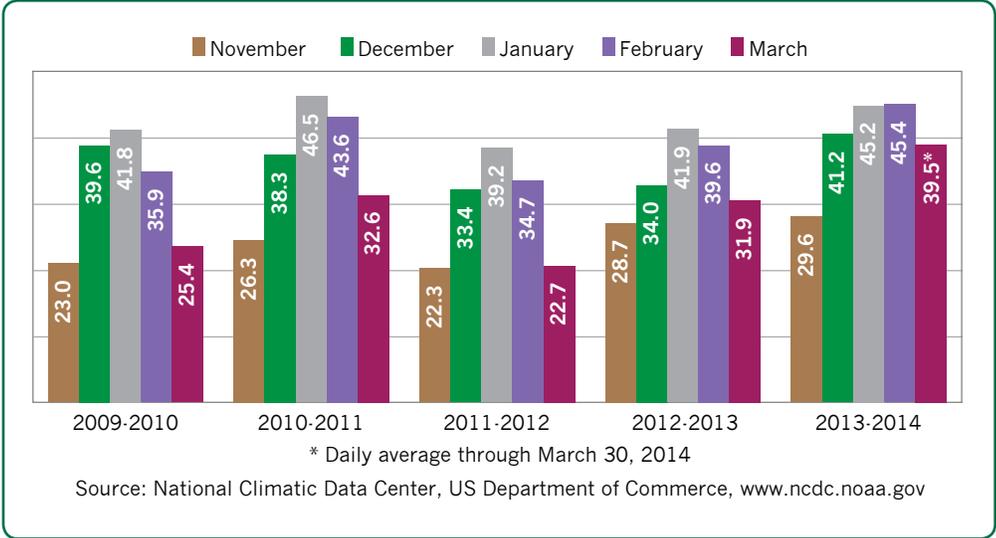
². Price and value for 2013 is not available until June 2014.

to thaw.³ Specifically, heating degree days refer to the days' temperature and the related demand for fuel.⁴ In 2014, the heating degree days for January, February, and March,⁵ the typical maple sap collecting season, have not declined in stages similar to other years. Continued high heating degree days are indicative of the prolonged cold of the current winter and the delay in sap flow.

In 2013, the earliest sap flow reported was January 1 in New York and the latest sap flow reported was February 15 in Wisconsin.⁶ In New Hampshire, the season opened on February 14 in 2011, February 2 in 2012, and on January 30 in 2013. The season usually runs about five weeks to the end of April annually. Producers are concerned that the extremely cold temperatures during this past winter have delayed the beginning of the sap collecting season for 2014 later than usual and might shorten the season once it does start. A short sap season affects both the availability and cost of maple syrup.

The New Hampshire Maple Producers Association hosts annual celebrations of maple sugaring in New Hampshire. The 19th Annual

Daily Average Heating Degree Days - Concord NH (base 65° F)



Maple Weekend, scheduled for March 22 and 23, 2014, allowed people a chance to visit producers and get a close-up look at maple sugaring operations. The Association also hosts Maple Sugaring Month in New Hampshire from March 15 through April 6, 2014.⁷ Current weather conditions put a damper on this year's events, however. Maple syrup producers have reported that the lingering cold of spring 2014 has slowed production, and voiced concerns about having adequate maple product available for Maple Weekend and Month.⁸

New challenges in 2015 for New Hampshire maple syrup producers will be the planned changes to the maple grading system. The International Maple Syrup Institute promoted the new grading system as a way to standardized maple grading across state and international borders.⁹ The New Hampshire Maple Producers Association voted to adopt the new rules, stating that the new grading system would expand markets and endorse their commitment to food safety and public health. The new system more precisely defines specific terms in the rules, adds

3. NOAA Satellite and Information Service. National Environmental Satellite Data, and Information Service (NESDIS). National Climatic Data Center. US Department of Commerce. <www.ncdc.noaa.gov>.

4. A heating degree day is calculated using the average of the daily maximum and daily minimum temperatures, and that temperature is subtracted from 65° F. The result is the heating degree day. For example, if the maximum temperature for a day is 45° and the minimum is 15°, 45° plus 15° equals 60°, divided by two equals 30°. Subtract 30° from the base of 65° and the result is 35 heating degree days. Simply put, it would take 35° of energy to heat a structure to reach the base of 65°. Additional information can be found at the National Weather Service, Cleveland, Ohio. <www.erh.noaa.gov/cle/climate/info/degreedays.html>.

5. Partial data available from March 1, 2014 through March 30, 2014

6. United States Department of Agriculture, National Agricultural Statistics Service. June 2013. News Release – Maple Syrup Production.

7. New Hampshire Maple Producers Association, Inc. <www.nhmapleproducers.com/maple-producer-events/maple-weekend-and-month/>.

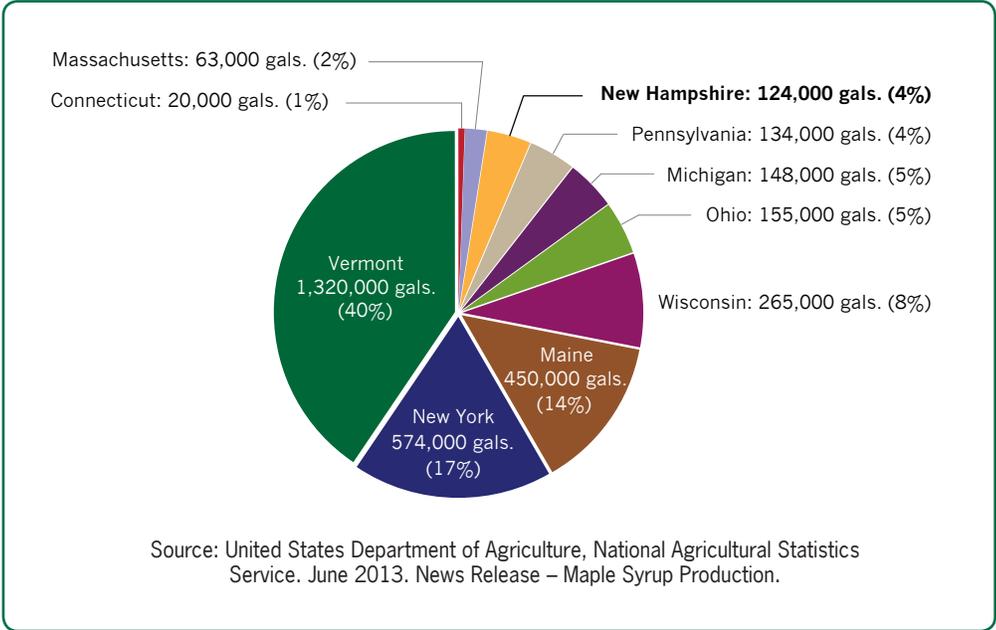
8. Nashua Telegraph. Himsel, Don. Maple sugar season off to slow start, but NH syrup producers hoping for 'old-fashioned winter' Sunday, March 9, 2014. <www.nashuatelegraph.com/news/1030898-469/maple-sugar-season-off-to-slow-start.html>.

9. NH Department of Agriculture, Markets and Food. Division of Regulatory Services. NH Maple Rules RSA 429:13-28 Chapter Agr 904. January 2014. <http://agriculture.nh.gov/divisions/markets/documents/maple-rules-listening-session.pdf>.

required color classes to the grades, and adjusts the density range measurements used for the specific grades. The new grading system also specifically defines the type of materials that can be used for consumer containers of packaged maple products, such as the use of only virgin food grade plastics and prohibiting any type of recycled plastic materials.

The labeling rules and batch information requirements for local maple producers will remain the same. The labels will detail the name and address of the producer; the true name of the product; the grade; and the volume of contents at 68° F. If a product is labeled as New Hampshire maple syrup, the contents must be entirely produced within the state. The current maple laws and rules will remain for the 2014 season and the changes will not be effective until the proposed rules are adopted.

National Share of Maple Syrup Production



The Vernal Equinox on March 20, 2014, marked the first day of spring. With the promise of spring and warmer days, maple sap will soon be boiling in maple sugar houses across the state.

Anita Josten

Seasonally Adjusted Estimates

Unemployment Estimates by Region

Seasonally Adjusted	Feb-14	Jan-14	Feb-13
United States	6.7%	6.6%	7.7%
Northeast	6.6%	6.7%	7.8%
New England	6.4%	6.7%	7.1%
Connecticut	7.0%	7.2%	7.9%
Maine	6.1%	6.2%	6.9%
Massachusetts	6.5%	6.8%	6.9%
New Hampshire	4.7%	4.9%	5.4%
Rhode Island	9.0%	9.2%	9.5%
Vermont	3.7%	4.0%	4.3%
Mid Atlantic	6.7%	6.7%	8.1%
New Jersey	7.1%	7.1%	8.8%
New York	6.8%	6.8%	8.0%
Pennsylvania	6.2%	6.4%	7.7%

Local Area Unemployment Statistics (LAUS) by Place of Residence

New Hampshire	Sep-13	Oct-13	Nov-13	Dec-13	Jan-14	Feb-14
Unemployment Rate	5.2%	5.2%	5.2%	5.2%	4.9%	4.7%
Civilian Labor Force	741,010	740,990	741,010	741,150	742,790	744,620
Number Employed	702,120	702,300	702,560	702,950	706,230	709,440
Number Unemployed	38,890	38,690	38,450	38,200	36,560	35,180
United States (in thousands)						
Unemployment Rate	7.2%	7.2%	7.0%	6.7%	6.6%	6.7%
Civilian Labor Force	155,473	154,625	155,284	154,937	155,460	155,724
Number Employed	144,270	143,485	144,443	144,586	145,224	145,266
Number Unemployed	11,203	11,140	10,841	10,351	10,236	10,459

Current Employment Statistics (CES) by Place of Establishment

Sector	Number of Jobs			Change from Previous	
	Feb-14	Jan-14	Feb-13	Month	Year
Total Nonfarm	645,600	642,200	638,900	3,400	6,700
Total Private	556,100	552,800	547,800	3,300	8,300
Mining and Logging	900	1,100	900	-200	0
Construction	22,100	21,600	22,600	500	-500
Manufacturing	66,200	66,200	66,000	0	200
Durable Goods	50,000	49,600	49,900	400	100
Non-Durable Goods	16,200	16,600	16,100	-400	100
Trade, Transportation, and Utilities	140,600	137,800	136,100	2,800	4,500
Wholesale Trade	27,200	27,100	26,700	100	500
Retail Trade	97,600	95,000	94,500	2,600	3,100
Transportation, Warehousing, and Utilities	15,800	15,700	14,900	100	900
Information	11,900	11,900	11,900	0	0
Financial Activities	35,400	35,400	35,300	0	100
Finance and Insurance	28,800	28,600	28,600	200	200
Real Estate and Rental and Leasing	6,600	6,800	6,700	-200	-100
Professional and Business Services	71,200	70,700	69,800	500	1,400
Professional, Scientific, and Technical Services	30,000	30,400	31,400	-400	-1,400
Administrative and Support and Waste Management and Remediation Services	32,000	32,300	30,200	-300	1,800
Education and Health Services	116,100	116,900	115,200	-800	900
Educational Services	29,400	29,700	29,000	-300	400
Health Care and Social Assistance	86,700	87,200	86,200	-500	500
Leisure and Hospitality	66,000	66,000	65,500	0	500
Arts, Entertainment, and Recreation	10,500	10,500	11,000	0	-500
Accommodation and Food Services	55,500	55,500	54,500	0	1,000
Other Services	25,700	25,200	24,500	500	1,200
Government	89,500	89,400	91,100	100	-1,600
Federal Government	7,400	7,300	7,400	100	0
State Government	23,400	23,200	24,500	200	-1,100
Local Government	58,700	58,900	59,200	-200	-500

Current month is preliminary; past months are revised

Prior data and area data are available on our Web site at www.nhes.nh.gov/elmi/statistics/ces-data.htm

Not Seasonally Adjusted Estimates by Place of Residence

Labor Force Estimates

New Hampshire	Feb-14	Jan-14	Feb-13
Total Civilian Labor Force	742,550	741,960	739,980
Employed	704,220	703,760	695,980
Unemployed	38,330	38,200	44,000
Unemployment Rate	5.2%	5.1%	5.9%

United States (# in thousands)	Feb-14	Jan-14	Feb-13
Total Civilian Labor Force	155,027	154,381	154,727
Employed	144,134	143,526	142,228
Unemployed	10,893	10,855	12,500
Unemployment Rate	7.0%	7.0%	8.1%

Unemployment Rates by Region

Not Seasonally Adjusted	Feb-14	Jan-14	Feb-13
United States	7.0%	7.0%	8.1%
Northeast	7.3%	7.2%	8.4%
New England	6.9%	7.1%	7.6%
Connecticut	7.4%	7.5%	8.4%
Maine	7.0%	6.9%	8.0%
Massachusetts	6.8%	7.1%	7.4%
New Hampshire	5.2%	5.1%	5.9%
Rhode Island	9.4%	10.1%	10.2%
Vermont	4.0%	4.3%	4.8%
Mid Atlantic	7.4%	7.3%	8.7%
New Jersey	7.8%	7.7%	9.3%
New York	7.7%	7.3%	8.6%
Pennsylvania	6.7%	6.9%	8.2%

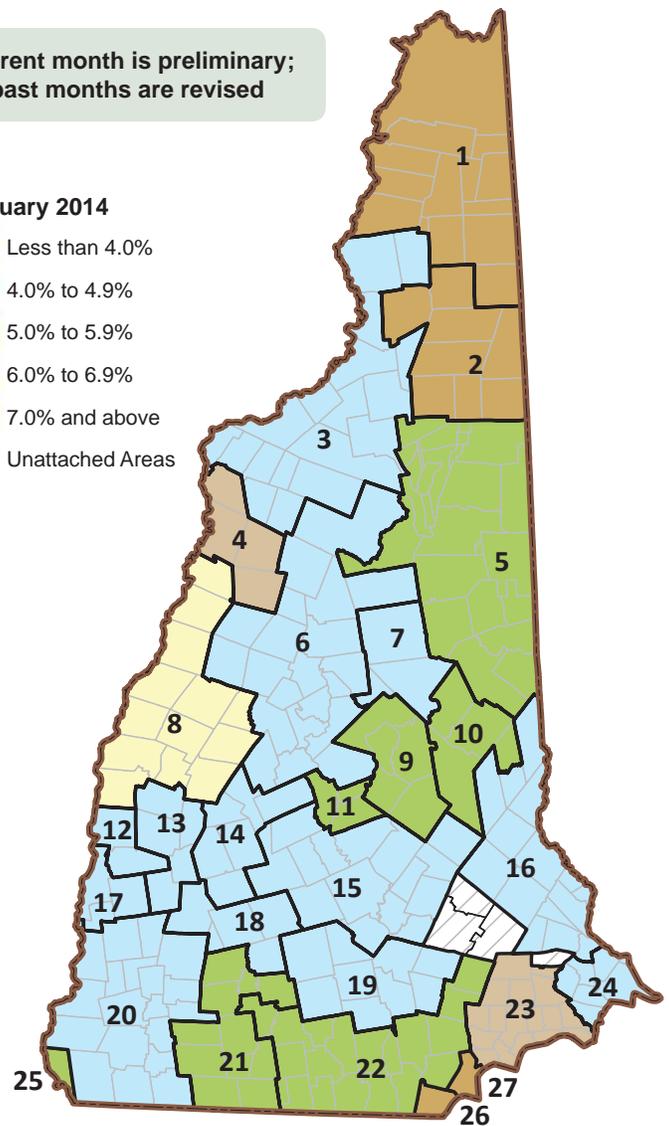
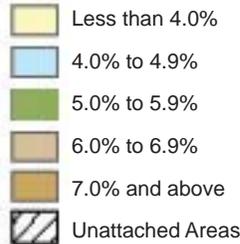
Unemployment Rates by Area

Counties	Feb-14	Jan-14	Feb-13
Belknap	5.3%	5.4%	6.3%
Carroll	5.5%	5.6%	6.0%
Cheshire	4.9%	4.8%	5.8%
Coos	7.0%	6.8%	7.7%
Grafton	4.2%	4.1%	4.6%
Hillsborough	5.2%	5.2%	6.0%
Merrimack	4.7%	4.6%	5.5%
Rockingham	5.6%	5.7%	6.4%
Strafford	4.9%	4.8%	5.7%
Sullivan	4.4%	4.2%	5.1%

Map Key	Labor Market Areas	Feb-14	Jan-14	Feb-13
1	Colebrook NH-VT LMA, NH Portion	7.5%	7.2%	7.8%
2	Berlin NH MicroNECTA	7.9%	7.7%	8.4%
3	Littleton NH-VT LMA, NH Portion	4.9%	5.0%	5.5%
4	Haverhill NH LMA	6.0%	6.2%	6.5%
5	Conway NH-ME LMA, NH Portion	5.6%	5.7%	6.3%
6	Plymouth NH LMA	4.9%	4.8%	5.4%
7	Moultonborough NH LMA	4.3%	4.4%	4.8%
8	Lebanon NH-VT MicroNECTA, NH Portion	3.3%	3.2%	3.8%
9	Laconia NH MicroNECTA	5.4%	5.4%	6.6%
10	Wolfeboro NH LMA	5.5%	5.6%	5.9%
11	Franklin NH MicroNECTA	5.6%	5.7%	6.4%
12	Claremont NH MicroNECTA	4.5%	4.4%	5.1%
13	Newport NH LMA	4.7%	4.5%	6.1%
14	New London NH LMA	4.1%	3.9%	4.7%
15	Concord NH MicroNECTA	4.8%	4.7%	5.6%
16	Rochester-Dover NH-ME MetroNECTA, NH Portion	4.9%	4.8%	5.7%
17	Charlestown NH LMA	4.4%	4.7%	5.6%
18	Hillsborough NH LMA	4.8%	4.8%	5.8%
19	Manchester NH MetroNECTA	4.9%	4.8%	5.8%
20	Keene NH MicroNECTA	4.6%	4.5%	5.3%
21	Peterborough NH LMA	5.8%	5.5%	6.2%
22	Nashua NH-MA NECTA Division, NH Portion	5.4%	5.3%	6.1%
23	Exeter Area, NH Portion, Haverhill-N. Andover-Amesbury MA-NH NECTA Division	6.2%	6.5%	7.1%
24	Portsmouth NH-ME MetroNECTA, NH Portion	4.6%	4.6%	5.4%
25	Hinsdale Town, NH Portion, Brattleboro VT-NH LMA	5.9%	6.0%	7.4%
26	Pelham Town, NH Portion, Lowell-Billerica-Chelmsford MA-NH NECTA Division	7.7%	7.9%	8.3%
27	Salem Town, NH Portion, Lawrence-Methuen-Salem MA-NH NECTA Division	7.0%	7.1%	8.2%

Current month is preliminary; past months are revised

February 2014



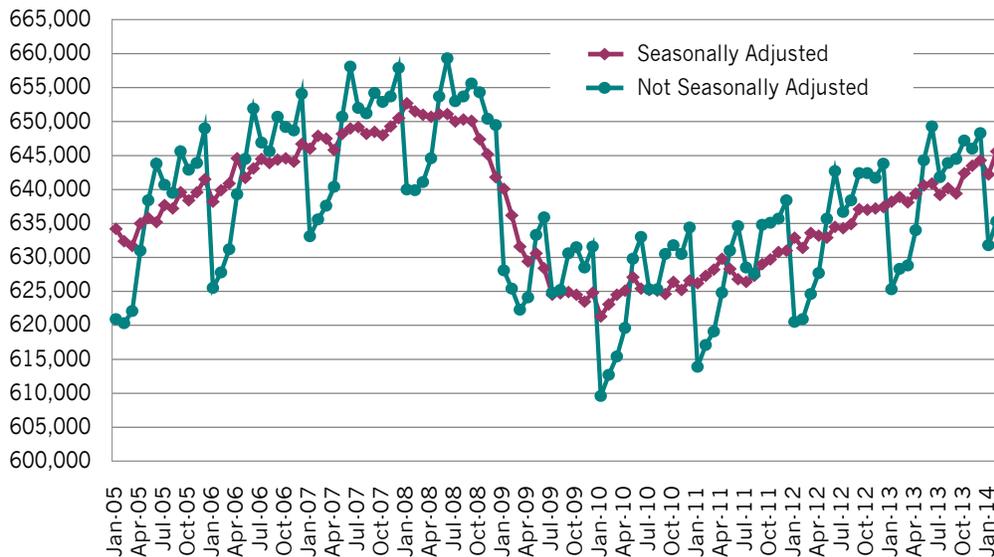
New Hampshire unemployment and labor force estimates are calculated using a regression model which depends on Current Population Survey (CPS) estimates. Labor Market Area estimates are calculated using the Bureau of Labor Statistics "Handbook Method" and then adjusted to the State levels.

Monthly Analysis of Current Employment Statistics (CES)

New Hampshire Nonfarm Employment Statewide Not Seasonally Adjusted

	Number of Jobs			Change from previous:	
	Feb-14 preliminary	Jan-14 revised	Feb-13	Month	Year
Total All Supersectors	635,300	631,800	628,300	3,500	7,000
Private Employment Total	542,400	543,200	533,800	-800	8,600
Mining and Logging	800	900	800	-100	0
Construction	19,200	19,300	19,800	-100	-600
Manufacturing	65,900	65,900	65,400	0	500
Durable Goods	50,000	49,900	49,500	100	500
Non-Durable Goods	15,900	16,000	15,900	-100	0
Trade, Transportation and Utilities	136,600	138,100	132,500	-1,500	4,100
Wholesale Trade	26,700	26,500	26,400	200	300
Retail Trade	94,600	96,400	91,500	-1,800	3,100
Transportation and Utilities	15,300	15,200	14,600	100	700
Information	11,900	11,900	11,800	0	100
Financial Activities	35,100	35,000	35,000	100	100
Professional and Business	70,000	69,300	68,200	700	1,800
Education and Health	116,600	116,300	115,900	300	700
Leisure and Hospitality	61,500	61,700	60,300	-200	1,200
Other Services	24,800	24,800	24,100	0	700
Government Total	92,900	88,600	94,500	4,300	-1,600
Federal Government	7,300	7,300	7,400	0	-100
State Government	24,700	21,000	26,000	3,700	-1,300
Local Government	60,900	60,300	61,100	600	-200

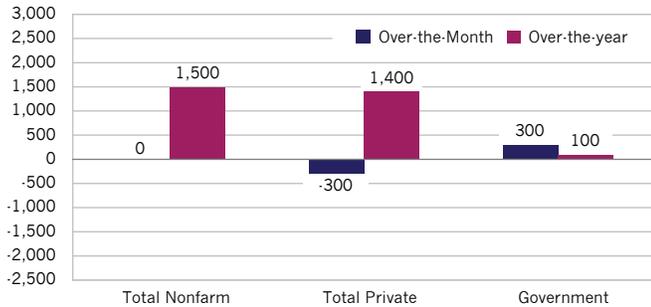
Total Nonfarm Employment Trend for February 2014



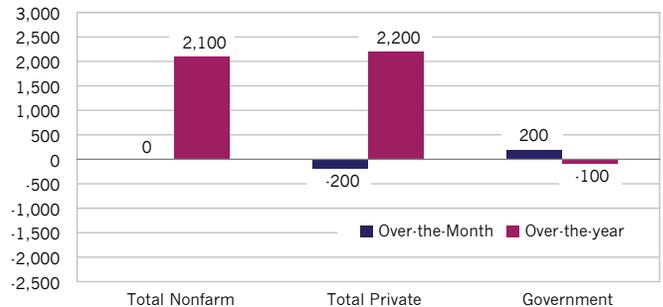
Not Seasonally Adjusted Estimates by Place of Establishment

Nonfarm Employment by Metropolitan Statistical Areas

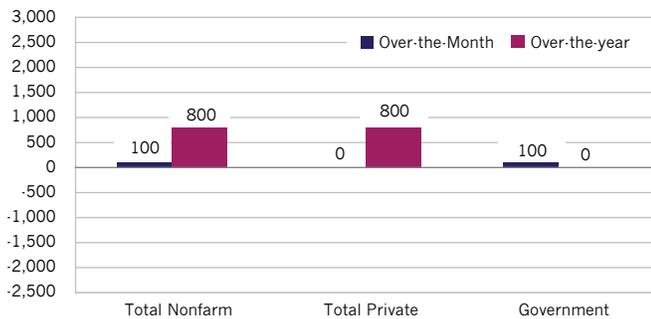
Manchester Metro NECTA
February 2014



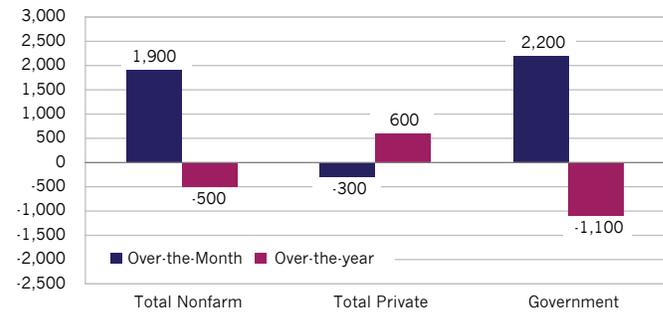
Nashua NH-MA NECTA Division
February 2014



Portsmouth NH-ME NECTA
February 2014

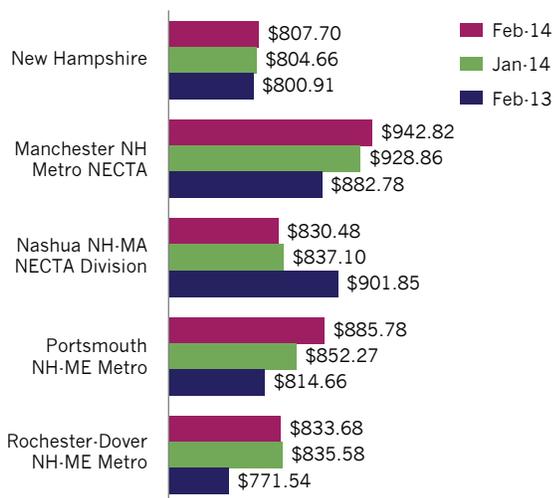


Rochester-Dover NH-ME NECTA
February 2014



Total Private Average Weekly Earnings Data

All Employees Average Weekly Earnings
February 2014



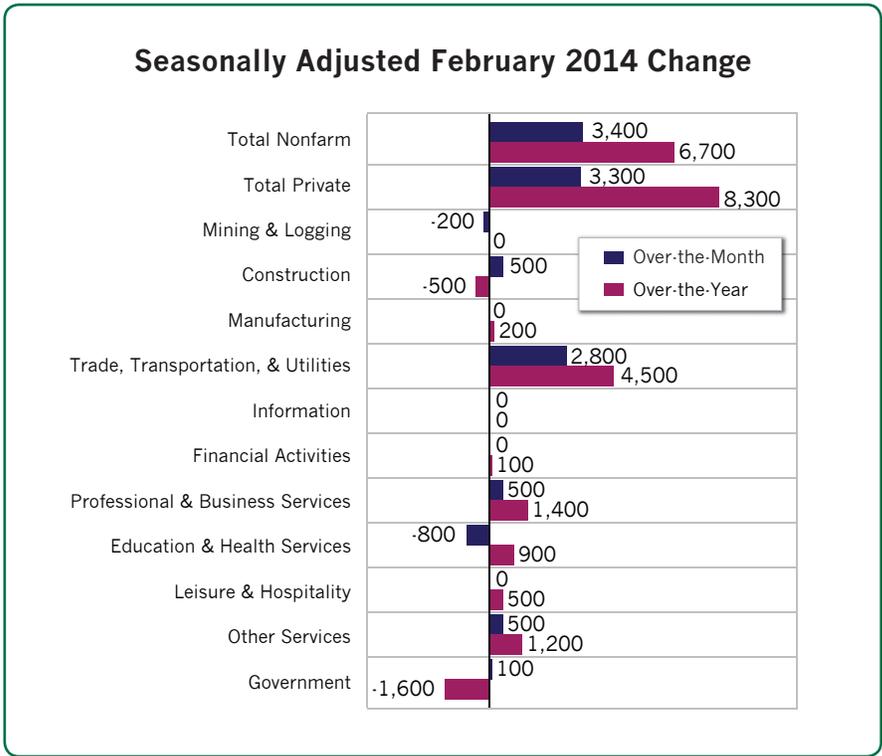
Production Workers Average Weekly Earnings
February 2014



Sector data for the four areas and hours and earnings data are available on our web site: www.nhes.nh.gov/elmi/statistics/ces-data.htm

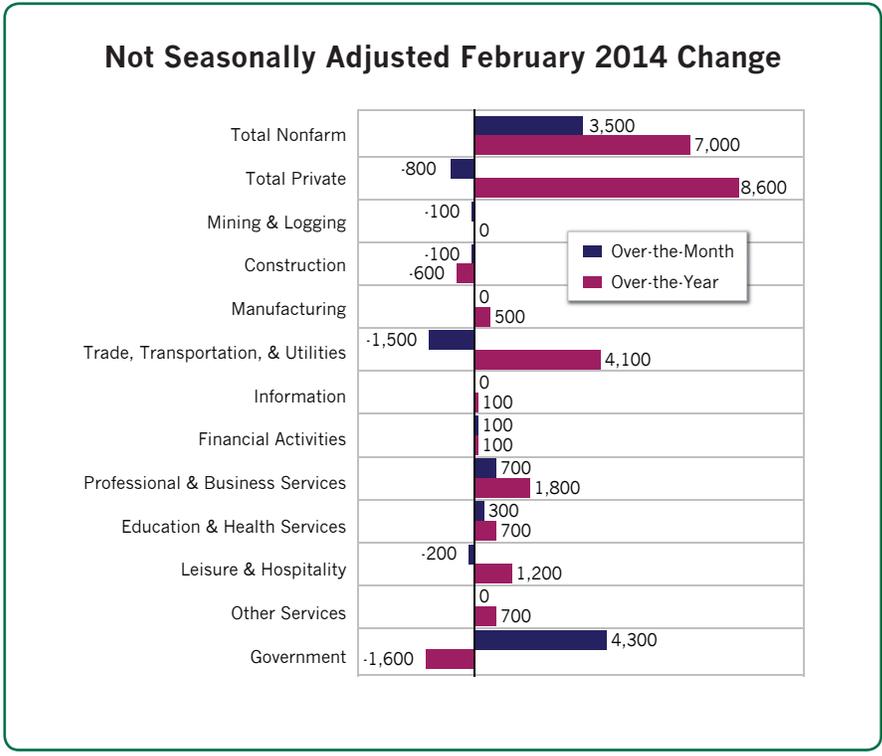
Seasonally Adjusted Statistical Analysis of Nonfarm Employment

- Preliminary total nonfarm employment rose by 3,400 jobs between January 2014 and February 2014. Nearly all of the growth was in the private sector.
- Almost 85 percent of the growth in the private sector was in trade, transportation, and utilities, up 2,800 jobs.
- Total nonfarm employment increased by 6,700 jobs over-the-year. All of this growth was in the private sector.
- From February 2013 to February 2014 over 50 percent of the private sector growth was in trade, transportation, and utilities, up 4,500 jobs.



Not Seasonally Adjusted Statistical Analysis of Nonfarm Employment

- Preliminary total nonfarm gained 3,500 jobs over-the-month. All of this growth was in the government sector.
- Eighty-eight percent of the increase in the government sector can be attributed to state government educational services, up 3,800 jobs.
- Between February 2013 and February 2014 total nonfarm expanded by 7,000 jobs. All of this growth was in the private sector.
- Nearly half of the growth in the private sector was in trade, transportation, and utilities, up 4,100 jobs.



For further analysis, see the *Detailed Monthly Analysis of Industry Employment Data* on our web site: www.nhes.nh.gov/elmi/statistics/ces-data.htm

Unemployment Compensation Claims Activity

	Sep-13	Oct-13	Nov-13	Dec-13	Jan-14	Feb-14
Initial Claims	3,141	4,470	4,155	6,662	5,608	4,362
Continued Weeks Claimed	28,493	25,301	25,937	36,665	38,952	37,190

Consumer Price Index

United States, All Urban Consumers, Not Seasonally Adjusted (CPI-U) (1982-1984=100)				
Feb-14	Jan-14	Feb-13	Change from Previous	
			Month	Year
232.166	233.916	232.166	0.4%	1.1%

NH Employment Security Economic and Labor Market Information Bureau

General Information(603) 228-4124
 <www.nhes.nh.gov/elmi>

Research Unit 228-4173

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Current Employment Statistics 228-4179

Local Area Unemployment Statistics ... 228-4167

Occupational Employment Statistics ... 229-4315

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Keene.....	352-1904	Laconia	524-3960
Littleton	444-2971	Manchester	627-7841
Nashua	882-5177	Portsmouth	436-3702
Salem.....	893-9185	Somersworth	742-3600

Claims calls: 1-800-266-2252

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