

New Jersey's Retail Trade Industry Sector

Prepared by:
New Jersey Department of Labor & Workforce Development
Office of Research & Information
Bureau of Labor Market Information
Winter 2021-2022



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THE GOAL OF THIS REPORT IS TO GET AN “IDEA” OF WHAT RETAIL MEANS TO NEW JERSEY

Identify the types of industries and establishments that make up the retail trade sector, based on a standard industry classification system

Describe any similarities and differences among its components with regard to such variables as employment, wage, occupation type, education, and demographic characteristics

Examine any present distinctions within the sector and its components that give New Jersey a competitive advantage compared to neighboring states, regions or the nation, or show areas where New Jersey could improve to add to the state’s economy

Analyze the current state of the retail trade sector and provide an outlook for employment into the future



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RETAIL TRADE: Background

- > Retailing is a vital commercial activity, providing customers with an opportunity to purchase goods and services from various types of merchants.
- > One-stop shopping has been pushed to the extreme, with mega malls that include retail stores, food courts, and entertainment centers. Independent retailers in small cities and towns have been replaced by superstore chains that carry virtually every type of merchandise from groceries to clothing and hardware, all under one roof. At the same time, online shopping has made it possible to purchase almost anything without having to leave home.



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DESCRIPTION AND OVERVIEW



What is the Retail Trade Industry Sector?

Composition of NAICS Codes

44-45 Retail Trade

- 441 Motor Vehicle and Parts Dealers
- 442 Furniture and Home Furnishings Stores
- 443 Electronics and Appliance Stores
- 444 Building Material & Garden Supply Stores
- 445 Food and Beverage Stores
- 446 Health and Personal Care Stores
- 447 Gasoline Stations
- 448 Clothing and Clothing Accessories Stores
- 451 Sporting Goods/Hobby/Book/Music Stores
- 452 General Merchandise Stores
- 453 Miscellaneous Store Retailers
- 454 Non-store Retailers



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Highlights of the Retail Industry Sector

The latest data shows that:

- Retail trade employment totaled 405,786 in 2020, or 12.7% of all private sector workers in the state. In comparison, the sector represented 12.5 percent of the nation's private sector employment in 2020.
- Retail represented nearly \$34.1 billion or 7.1 percent of the state's real Gross Domestic Product in 2020 in private industries (6.4% in all industries) while the U.S. had a 6.7 percent representation in its private industries' GDP as well as lower in all industries (5.9%).
- New Jersey retailers paid over \$16.2 billion in total wages during 2020, or 6.8 percent of the state total (7.2% for US). In addition, retail businesses accounted for 10.7 percent of all units in the statewide total private sector in 2020 (10.2% for US).



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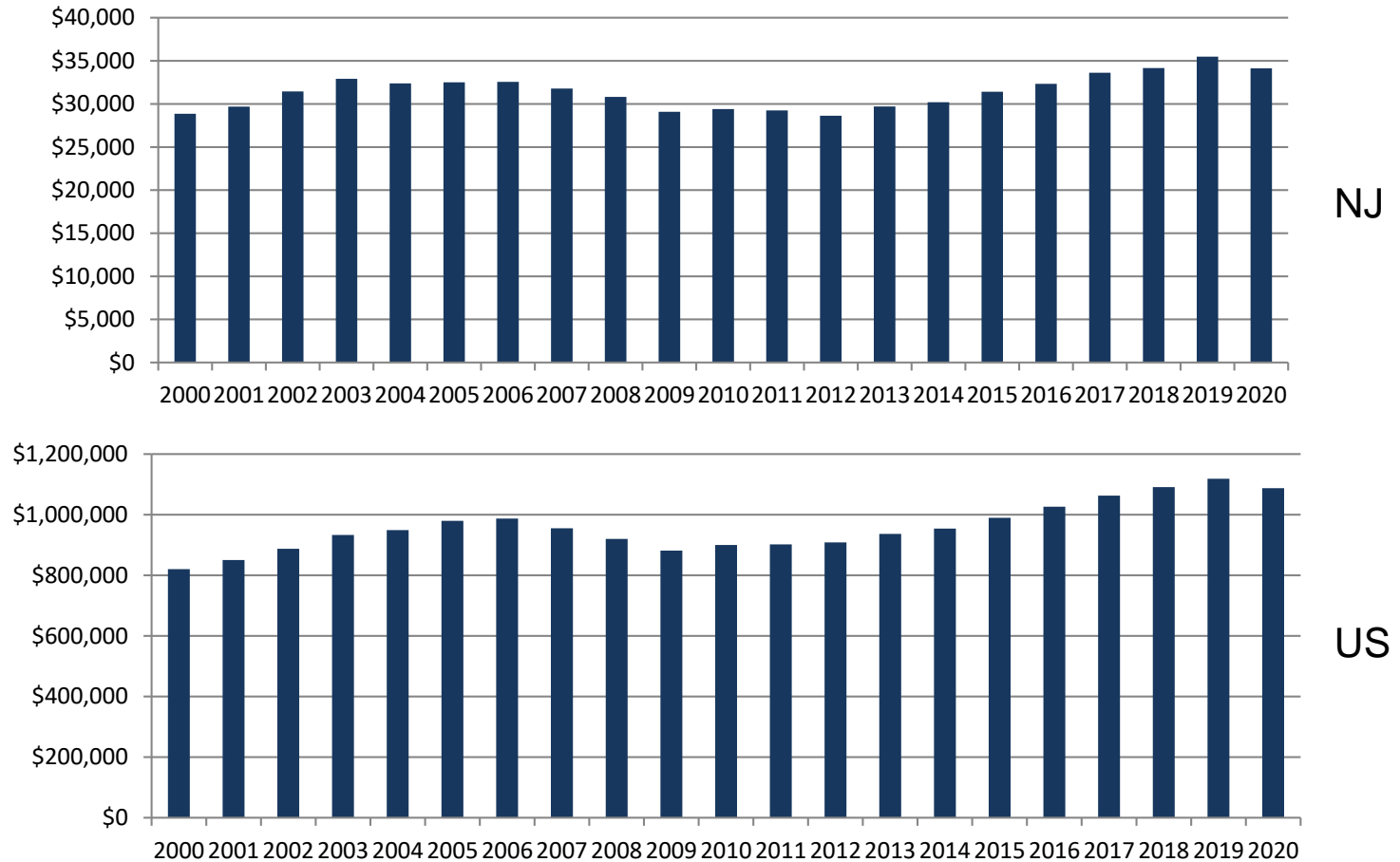
Source: NJLWD, Quarterly Census of Employment and Wages,
Bureau of Economic Analysis,
Prepared by: New Jersey Department of Labor and Workforce
Development, December 2021

Retail Trade Real GDP: 2000 - 2020

(millions of chained 2012 dollars): NJ vs. US

The real gross domestic product (GDP) for Retail Trade in the US and the state had exceeded their previous highest levels until last year when the pandemic struck causing GDP to drop.

NJ had continually risen since 2012 while the US stated their recovery earlier, 2009-2010.



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Source:
Bureau of Economic Analysis
Prepared by: New Jersey Department of Labor and
Workforce Development, December 2021

Breakdown of Retail Trade Industry

➤ The 2020 average annual wage for New Jersey's Retail Trade sector was \$39,829 or over \$34,000 less than the state average for all private sector workers (\$74,085).

➤ In comparison, the annual average wage in the nation's retail sector was \$36,740 or about \$27,500 less than the its average for all private sector workers (\$64,238).

New Jersey's Retail Trade Industry (2020)

Industry Components	Employment	Establishments	Average Annual Wage (\$)
Retail Trade	405,786	29,656	\$39,829
Private Sector Employment, NJ Total	3,207,013	278,221	\$74,085

Source: NJ Department of Labor and Workforce Development, Quarterly Census of Employment and Wages, 2020 Annual Average

➤ Total wages paid in New Jersey's Retail Trade industry during 2020 accounted for 6.8 percent of the private sector wages paid in the state versus 7.2%, nationally.

➤ The Retail Trade sector's lower average annual wage reflects some of the entry level, lower skill, seasonal and part-time nature of many of the occupations found within it.



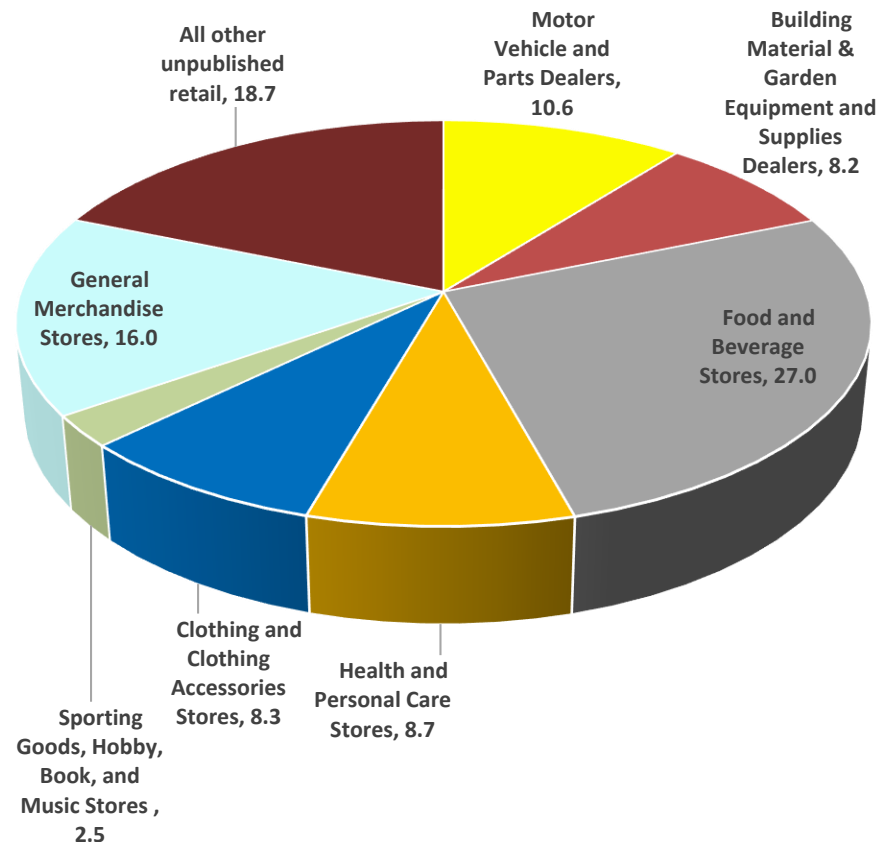
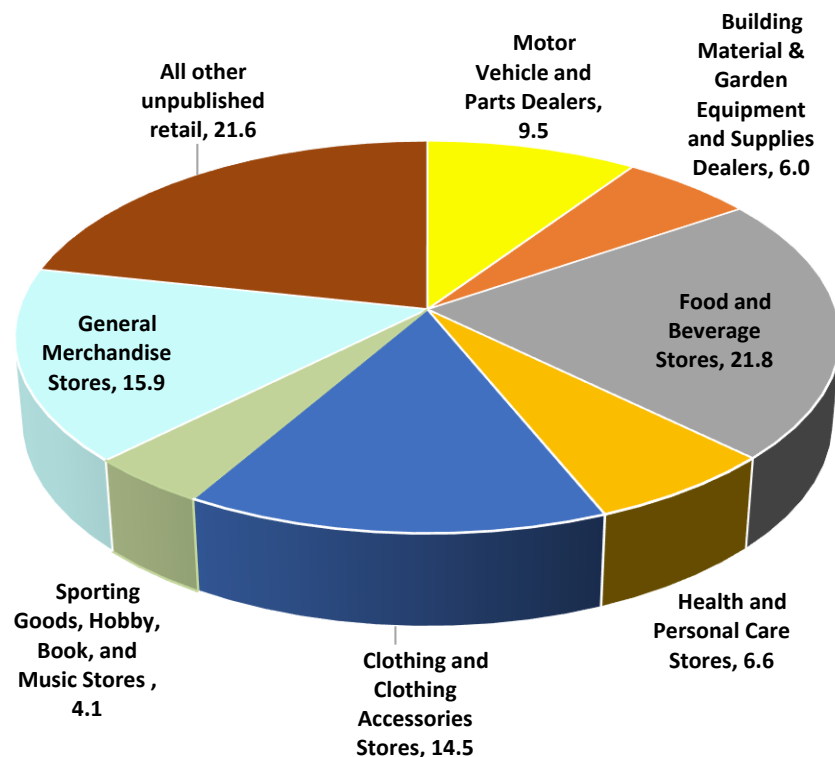
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DETAILED INDUSTRY EMPLOYMENT: CURRENT AND TREND ANALYSIS



THE LANDSCAPE OF RETAIL HAS CHANGED OVER THE PAST 30 YEARS

Employment of Components as a Percentage of Retail
New Jersey, 1990 & 2020



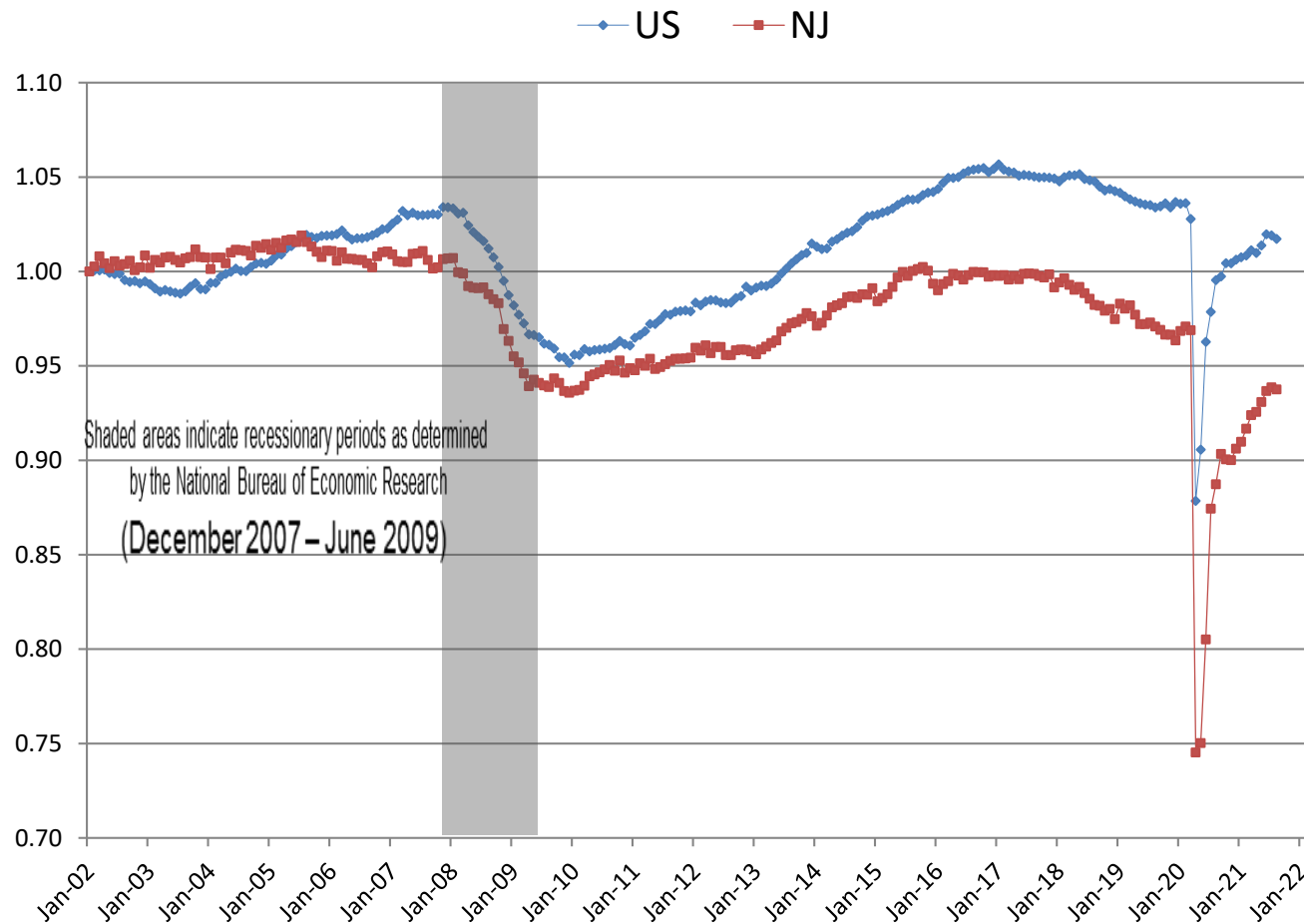
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Source: NJLWD,
Current Employment Statistics, Annual Averages
Prepared by: New Jersey Department of Labor and Workforce
Development, December 2021

NJ and US Employment Index: Retail Trade

January 2002 – August 2021

Seasonally Adjusted Current Employment Statistics (CES)



From January 2002 until around September 2005, retail employment fared better in the state than the U.S.

Since then, the two have followed a similar trend. However, NJ's retail employment has remained below that of the nation, even during the drastic drop-off due to the Covid-19 pandemic in March/April 2020.

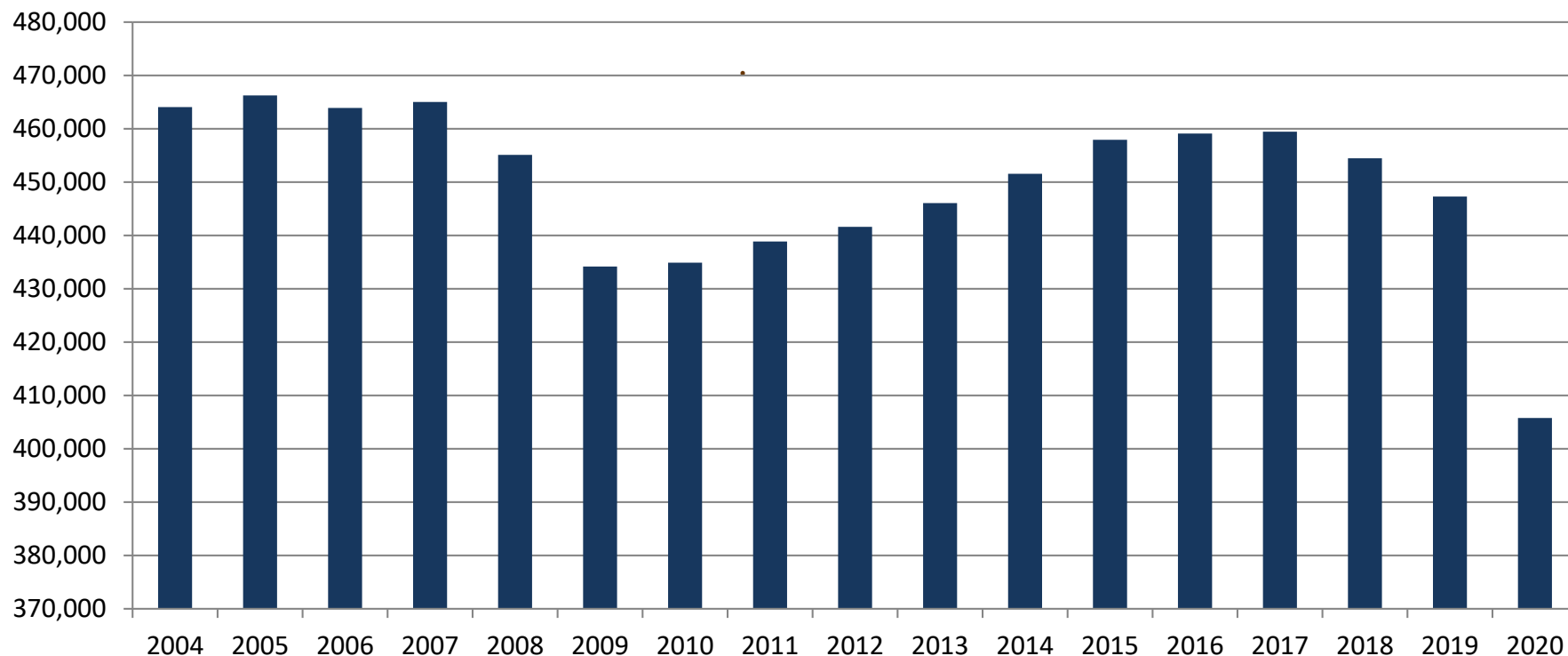


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Source: NJLWD, Current Employment Statistics
Prepared by: New Jersey Department of Labor and Workforce
Development, December 2021

Retail Trade Quarterly Census of Employment & Wages Statewide

Employment: Annual Averages, 2004 - 2020



As illustrated above, New Jersey's Retail Trade employment showed steady improvement after being down in two consecutive years: '07-'08 and '08-'09... as a result of the recession. However, it leveled off from 2015-2017 and has since dropped. The pandemic starting in March 2020 dropped levels further.



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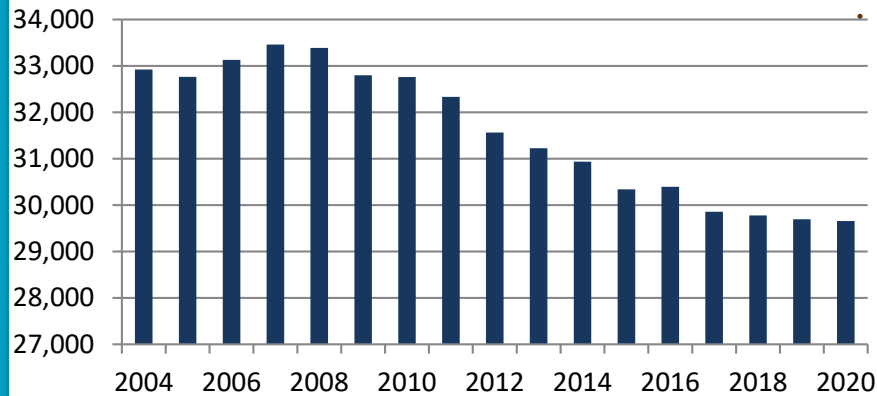
Source: NJLWD, Quarterly Census of Employment and Wages,
Annual Averages

Prepared by: New Jersey Department of Labor and Workforce
Development, December 2021

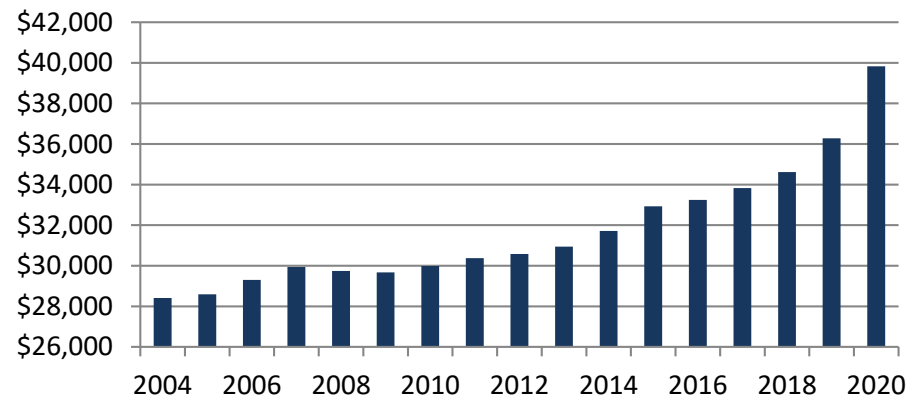
Retail Trade Quarterly Census of Employment & Wages

Establishments & Wages: Annual Averages, 2004 - 2020

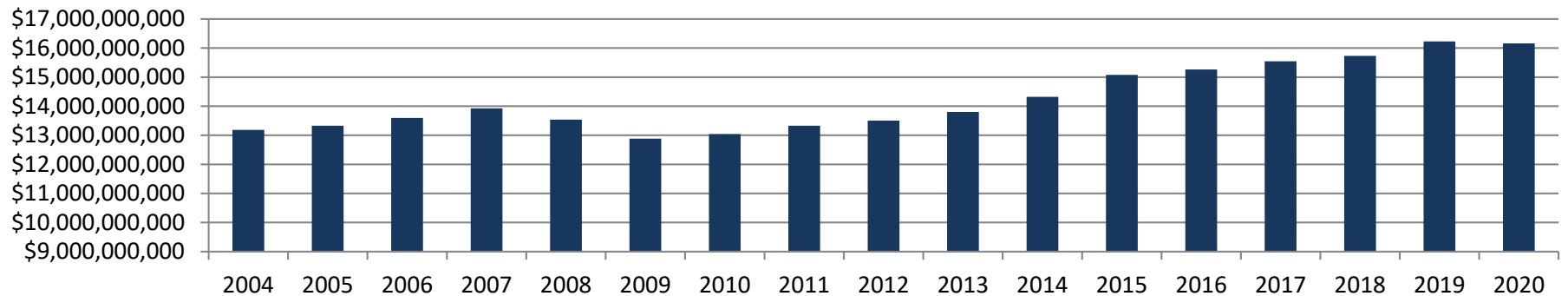
Units/Establishments



Annual Average Wages



Total Wages



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Source: NJLWD, Quarterly Census of Employment and Wages,
Annual Averages

Prepared by: New Jersey Department of Labor and Workforce
Development, December 2021

A deeper look at more detailed industry level data comparing the state's change in employment from 2010-to-2020 yields the table below:

		<u>2010</u>	<u>2020</u>	<u>Change</u>		
				<u>Total</u>	<u>Percent</u>	
441	Motor vehicle and parts dealers	41,315	42,723	1,408	3.4	➤ Six NJ retail industries posted losses from 2010 to 2020: NAICS 442; 443; 448; 451; 452 and 453.
442	Furniture and home furnishings stores	14,953	13,439	-1,514	-10.1	
443	Electronics and appliance stores	17,184	12,501	-4,683	-27.3	
444	Building Material and Garden Equipment and Supplies	30,044	33,080	3,036	10.1	➤ The industry with the most employment, food and beverage stores, added 2,323 jobs.
445	Food and beverage stores	106,678	109,001	2,323	2.2	
446	Health and personal care stores	34,784	35,228	444	1.3	
447	Gasoline stations	14,645	18,296	3,651	24.9	➤ The most significant loss (-23,379 jobs) in NJ occurred in clothing stores while sporting goods stores had the highest rate of staffing losses (-42.0%).
448	Clothing and clothing accessories stores	57,646	34,267	-23,379	-40.6	
451	Sporting Goods, Hobby, Book & Music Stores	17,784	10,321	-7,463	-42.0	
452	General merchandise stores	67,509	64,604	-2,905	-4.3	
453	Miscellaneous store retailers	20,281	16,052	-4,229	-20.9	
454	Nonstore retailers	12,080	16,275	4,195	34.7	➤ The retail industry that posted the largest employment gain was also the fastest-growing in the state: non-store retailers (+4,195 jobs or 34.7%). The significant gain could be partly attributed to an increase in online shopping and the influx of Amazon fulfillment centers.

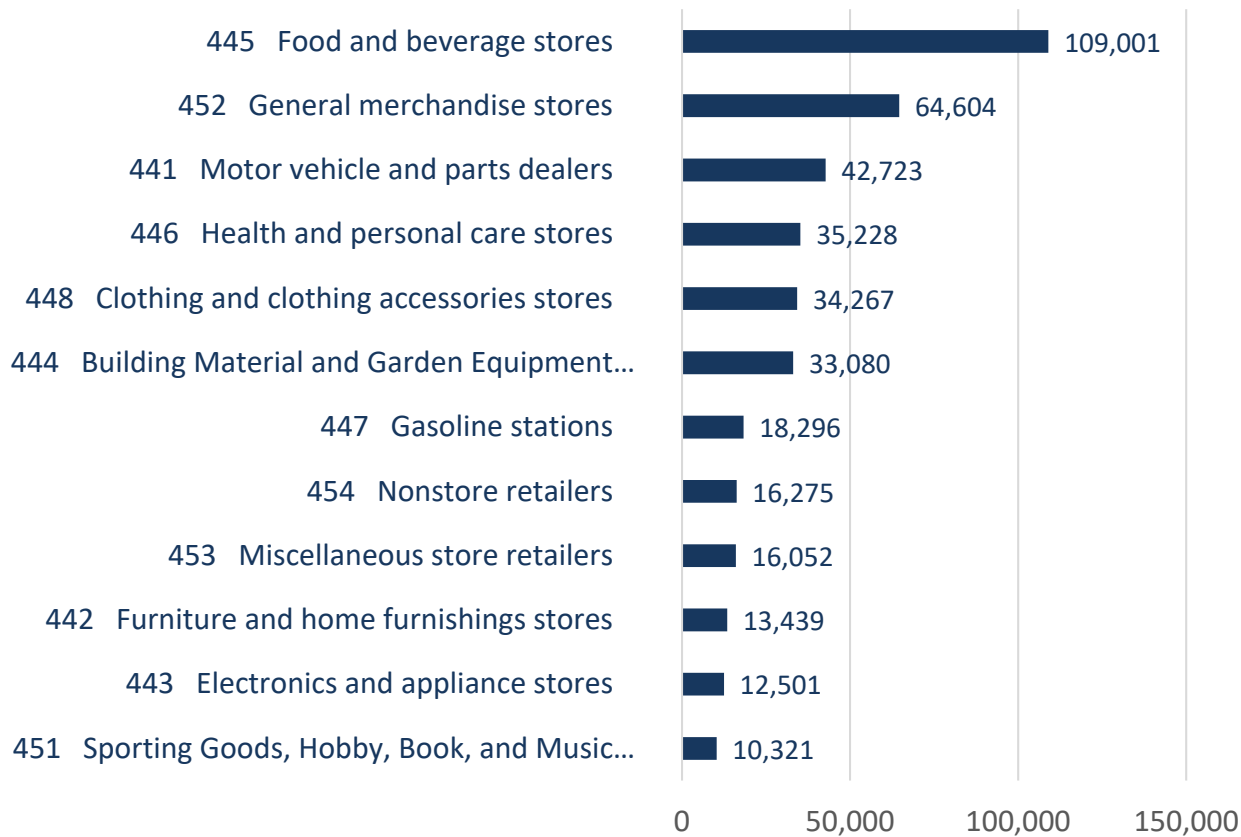


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Source: NJLWD,
Quarterly Census of Employment and Wages
Prepared by: New Jersey Department of Labor and Workforce Development,
December 2021

“Food” plays a significant role in retail

NJ Retail 2020 Employment by 3-digit NAICS



- Food and beverage stores are the primary component of retail accounting for 26.9 percent of the industry.
- Of the three-digit industries within the retail sector, the top three accounted more than half (53.3%) of all jobs.



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Source: NJLWD, Quarterly Census of Employment and Wages
Prepared by: New Jersey Department of Labor and Workforce Development,
December 2021

Inside Food and Beverage Stores...

- In the Food and Beverage Stores' industry, supermarkets and other grocery stores accounted for over seven of every ten (71.5%) jobs, 74.6 percent of the total wages paid and over one-third (34.5%) of the establishments.
- Convenience Stores and Beer, Wine & Liquor Stores round out the top three accounting for about 10.5 and 9.6 percent of the Food & Beverage Stores' employment total, respectively.
- The 2020 average annual wage of those employed in the Food and Beverage Stores industry was \$31,731, which was 79.7 percent of the sector's average wage (\$39,829) but just 42.8 percent of the state's private sector average wage (\$74,085). Supermarkets and Other Grocery Stores, the largest segment of Food and Beverage Stores, posted a 2020 annual average wage of \$33,119.



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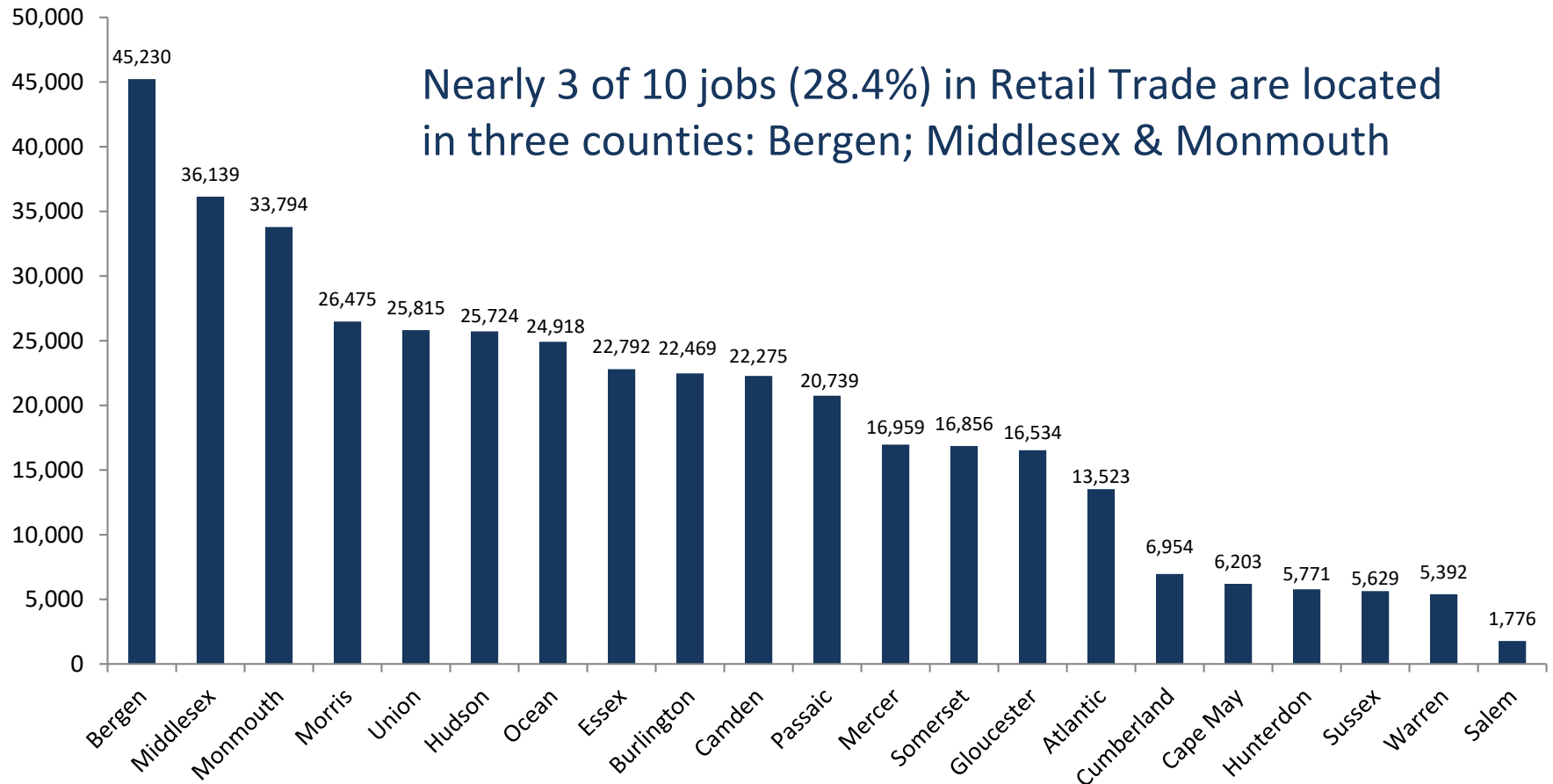
Source: NJLWD, Quarterly Census of Employment and Wages
Prepared by: New Jersey Department of Labor and Workforce Development,
December 2021

County-wide retail data: Analysis at a local level



2020 Annual Average QCEW (Retail) Employment by County

Nearly 3 of 10 jobs (28.4%) in Retail Trade are located in three counties: Bergen; Middlesex & Monmouth

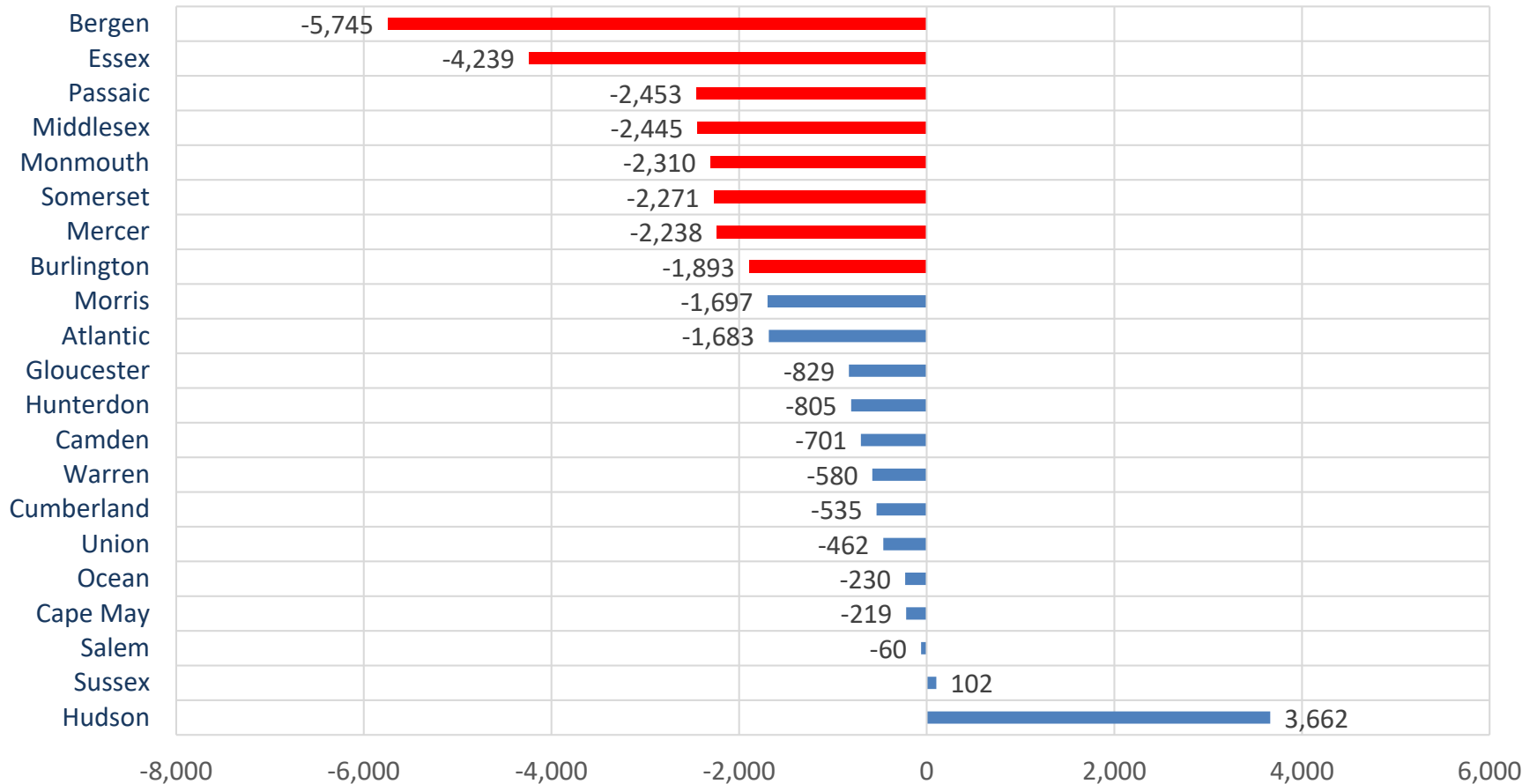


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Source: NJLWD, Quarterly Census of Employment & Wages,
Annual Averages
Prepared by: New Jersey Department of Labor and Workforce
Development, December 2021

Retail Employment

Gains/Losses: 2010 - 2020 by County (Total)



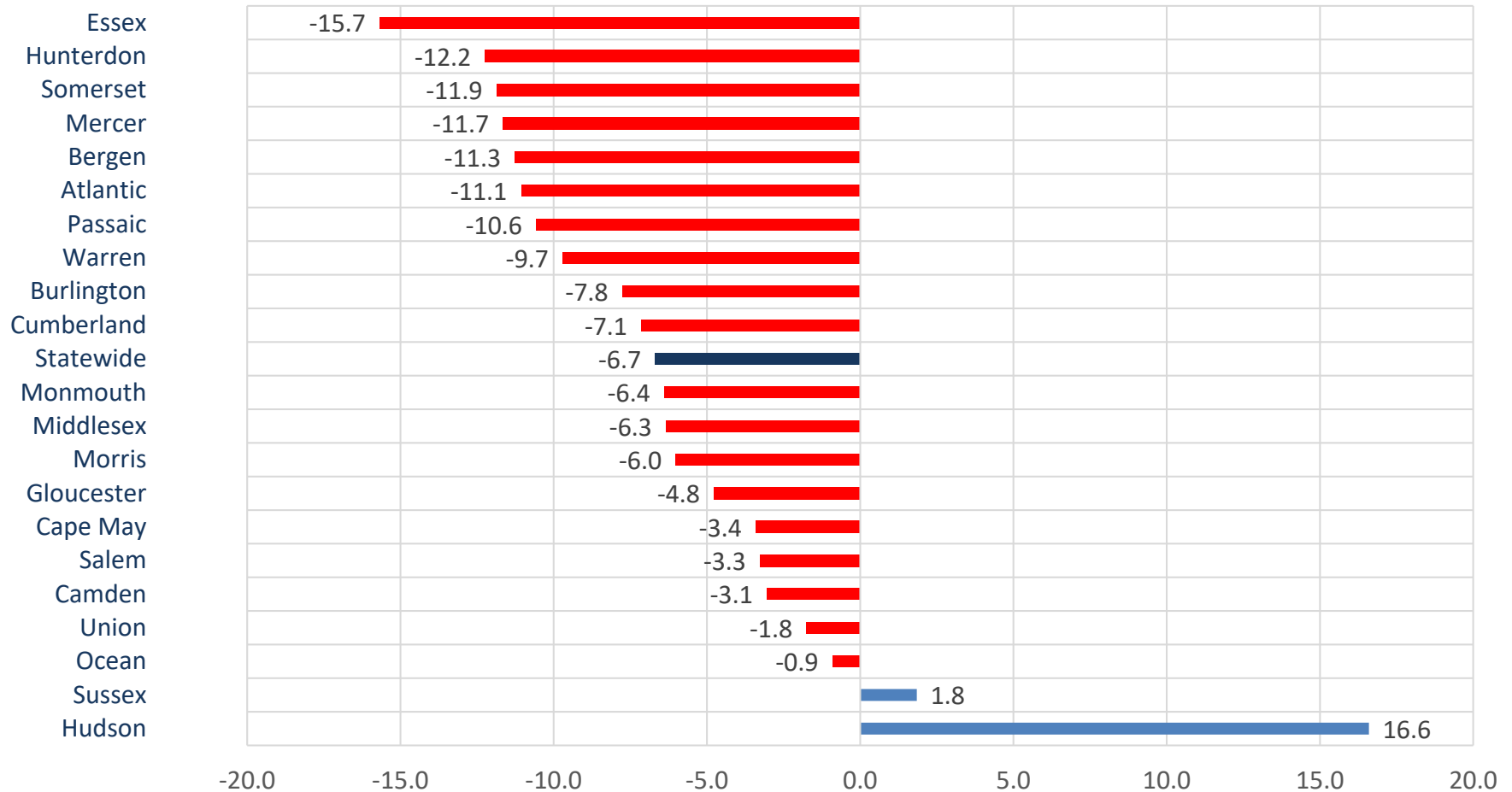
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Source: NJLWD, Quarterly Census of Employment & Wages,
Annual Averages

Prepared by: New Jersey Department of Labor and
Workforce Development, December 2021

Retail Employment

Gains/Losses: 2010 - 2020 by County (Percent)

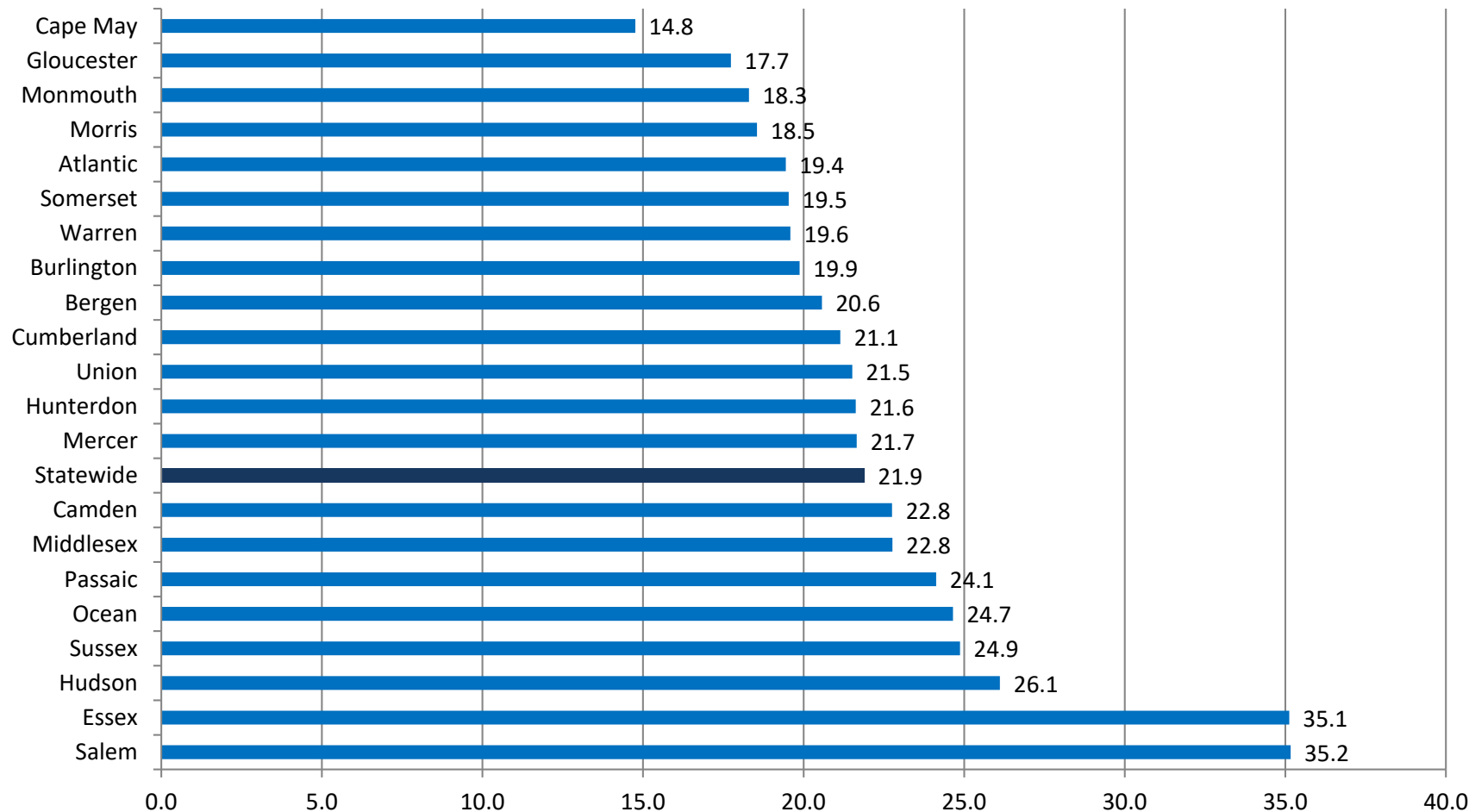


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Source: NJLWD, Quarterly Census of Employment & Wages,
Annual Averages
Prepared by: New Jersey Department of Labor and Workforce
Development, December 2021

Retail Employment & Population: 2020

Number of County Residents Per Retail Job



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Source: NJLWD, US Census Bureau, 2020 Population Estimates,
Quarterly Census of Employment & Wages, Annual Averages, Prepared
by: New Jersey Department of Labor and Workforce Development,
December 2021

OCCUPATIONAL ANALYSIS



Wages by Occupation

- The wage data published are possible due to thousands of New Jersey employers who participated in the Occupational Employment & Wage Statistics (OEWS) Survey over the past three years. The data collected in the OEWS Survey provides valuable input for wage comparisons and for identifying trends in emerging or declining occupations -- *precisely the kind of information needed by both employers as well as those who are choosing or changing careers.*
- In retail, the lower wages are mainly due to entry-level, part-time, lower skill and education requirements.
- According to the June 2020 OEWS Survey, the sector's three largest occupations are retail salespersons, cashiers and stock clerk and order fillers. The 25th percentile of all three of those which can be considered "entry-level" pays around \$23,600 per year.



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Source: NJLWD, Occupational Employment Statistics
Survey, July 2021

Prepared by: New Jersey Department of Labor and
Workforce Development, December 2021

Wages by Occupation

- The occupation with the fourth highest number of estimated employees, first line supervisors of retail sales workers, requires more experience/education/training which results in a higher-paying position. The average hourly rate is about \$27.55 while entry-level pay is about \$19/hour and a more experienced supervisor can earn about \$33/hour.
- On the upper end of the pay scale, retail occupations that pay an average of \$100,000 or more per year mostly include managers of all types as well as chief executives, pharmacists, optometrists, computer network architects and software developers.
- ***For additional occupational wage data not shown, please contact our office for assistance or use the following URL:***
https://www.nj.gov/labor/lpa/employ/oeswage/oeswage_index.html



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Source: NJLWD, Occupational Employment Statistics
Survey, July 2021

Prepared by: New Jersey Department of Labor and
Workforce Development, December 2021

Top occupations within retail with estimated 2020 employment & wages

(25th percentile can be considered “entry-level” while 75th percentile can be “more experienced”

SOC Code	Occupational Title	Est'd Empl.	Mean (Avg.) Hourly	Mean (Avg.) Salary	25th Pctile. Hourly	25th Pctile. Salary	75th Pctile. Hourly	75th Pctile. Salary
00-0000	Total all occupations	401,260	\$18.55	\$38,600	\$11.60	\$24,100	\$19.85	\$41,300
41-2031	Retail Salespersons	92,120	15.55	32,400	11.40	23,800	17.00	35,300
41-2011	Cashiers	73,300	12.75	26,500	11.20	23,300	12.95	27,000
53-7065	Stockers and Order Fillers	42,210	14.20	29,500	11.50	23,900	15.35	32,000
41-1011	First-Line Supervisors of Retail Sales Workers	21,440	27.55	57,300	19.00	39,500	33.05	68,800
35-2021	Food Preparation Workers	16,120	13.35	27,700	11.50	23,900	14.45	30,100
43-4051	Customer Service Representatives	10,260	15.35	32,000	11.90	24,700	17.60	36,600
53-6031	Automotive and Watercraft Service Attendants	9,210	11.85	24,700	11.00	22,900	12.00	24,900
29-2052	Pharmacy Technicians	7,930	16.25	33,800	13.05	27,100	18.70	38,900
53-7062	Laborers and Freight, Stock, and Material Movers, Hand	7,910	15.90	33,100	12.70	26,400	18.05	37,500
49-3023	Automotive Service Technicians and Mechanics	6,800	25.50	53,100	17.85	37,100	31.65	65,800
29-1051	Pharmacists	6,110	60.70	126,200	51.50	107,100	67.55	140,500
43-9061	Office Clerks, General	5,270	15.55	32,300	11.00	22,900	17.35	36,100
53-3033	Light Truck Drivers	5,130	15.55	32,300	12.10	25,200	17.50	36,400
11-1021	General and Operations Managers	4,850	60.30	125,500	36.10	75,100	68.35	142,200
43-5071	Shipping, Receiving, and Inventory Clerks	4,830	16.70	34,800	12.05	25,100	19.85	41,200
43-1011	First-Line Supervisors of Office and Administrative Support Workers	3,990	26.90	56,000	20.90	43,500	31.70	65,900
41-2022	Parts Salespersons	3,490	20.15	41,900	14.60	30,300	24.45	50,800
53-1047	First-Line Supervisors of Transportation and Material-Moving Workers, Except Aircraft Cargo Handling Supervisors	3,370	25.05	52,100	18.45	38,400	29.75	61,900
53-7064	Packers and Packagers, Hand	3,340	13.65	28,400	11.45	23,800	14.65	30,500
35-3023	Fast Food and Counter Workers	3,300	12.90	26,900	11.00	22,900	13.90	28,900



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Source: NJLWD, Occupational Employment Statistics Survey,
July 2021

Prepared by: New Jersey Department of Labor and
Workforce Development, December 2021

DEMOGRAPHIC CHARACTERISTICS OF THE INDUSTRY SECTOR WORKFORCE



New Jersey Resident Workforce Demographic Characteristics

All Industries in NJ vs. Retail: 2019 by Age, Sex, Race & Hispanic Origin

➤ Retail trade is characterized by a large number of seasonal and part-time jobs and by workers who are younger than the average for all industries. Nearly one-quarter of workers are under 25 years old compared with just over one in 10 for all industries.

➤ Many businesses in the sector increase hiring during the summer, often employing high school-age and college-age workers. Some segments of the industry sector are heavily reliant on immigrant and guest workers such as boardwalk and amusement establishments.

<u>By Age</u>	All	Retail
Less than 25	11.7%	23.0%
25-34	20.5%	20.3%
35-44	20.7%	16.3%
45-54	21.5%	15.8%
55-64	18.7%	16.8%
65 & over	6.9%	7.8%
<u>By Sex</u>		
Male	52.4%	53.7%
Female	47.6%	46.3%
<u>By Race</u>		
White	67.6%	69.5%
Black	13.4%	13.0%
American Indian/Alaska Native	0.2%	0.3%
Asian	10.1%	8.9%
Native Hawaiian/Pacific Islander	0.0%	0.0%
Some Other Races	6.4%	5.7%
Two or more races	2.3%	2.6%
<u>By Hispanic origin</u>		
Non-Hispanic	79.4%	79.0%
Hispanic	20.6%	21.0%



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Source: 2019 American Community Survey
Public Use Micro-data Sample (5% Sample),
December 2021

New Jersey Resident Workforce Characteristics

All Industries in NJ vs. Retail Trade: 2019 Earnings

	<u>By Personal Earnings</u>	<u>All</u>	<u>Retail</u>
➤ Retail trade had a significantly higher proportion than “All industries” in the lowest dollar range in <i>Personal Earnings</i> : “Less than \$25,000”.	Less than \$25,000	25.2%	40.5%
	\$25,000 - \$50,000	24.3%	29.6%
	\$50,000 - \$75,000	18.6%	13.4%
	\$75,000 - \$100,000	10.9%	6.2%
➤ This is the result of the low paying nature of the occupations in retail industries.	\$100,000 - \$150,000	11.1%	5.6%
	\$150,000 - \$200,000	4.2%	1.9%
	\$200,000 & more	5.7%	2.8%

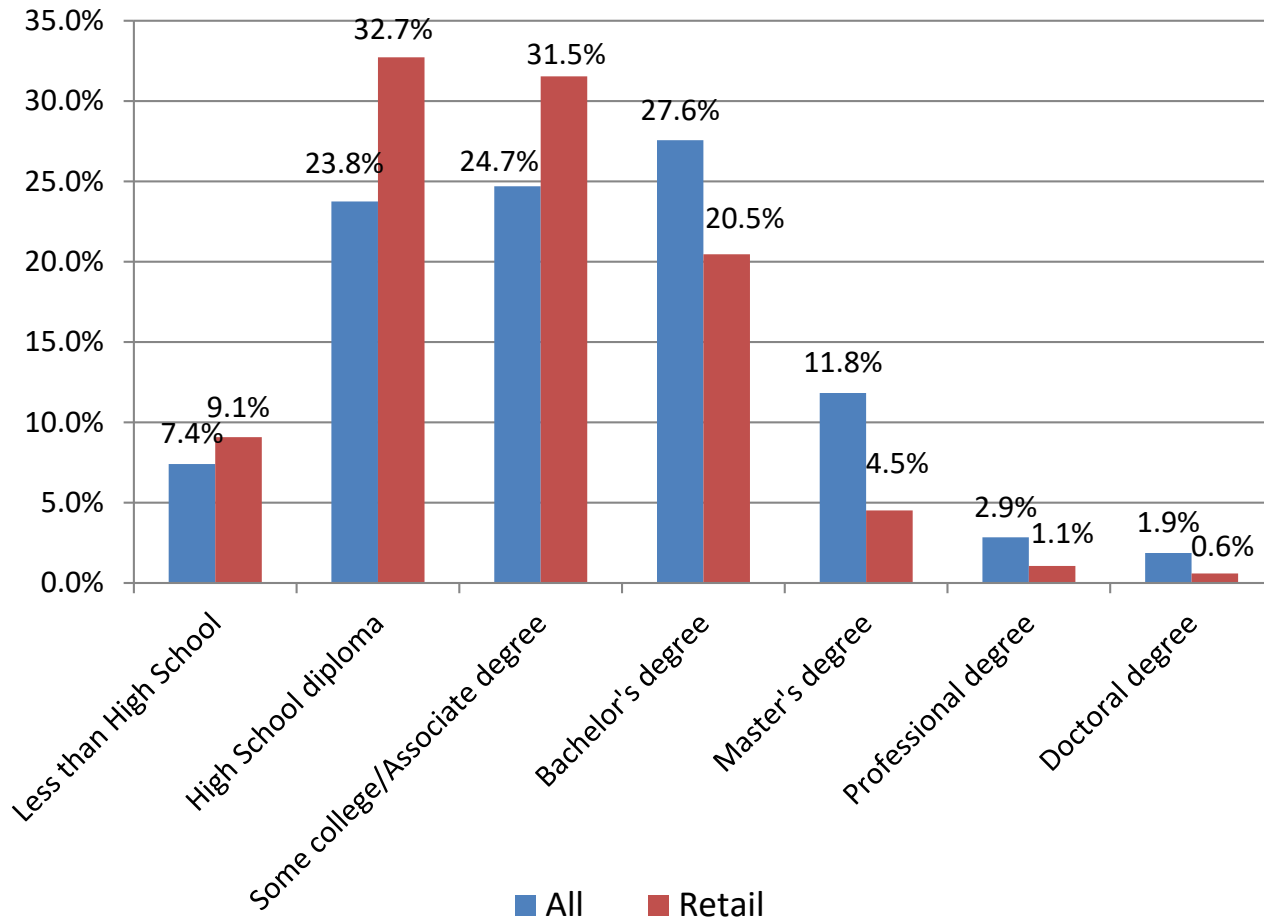


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Source: 2019 American Community Survey
Public Use Micro-data Sample (5% Sample),
December 2021

New Jersey Resident Workforce Characteristics

All Industries vs. Retail Trade: 2019 Educational Attainment



➤ A greater proportion of retail workers have achieved a lower level of education than workers overall due to its lower skilled, entry-level positions with a higher turnover rate.

➤ The 2019 American Community Survey states 4 of 10 (41.8%) workers in this industry sector do not have any formal education beyond high school compared with less than 1/3 (31.2%) for employees in all industries statewide.



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Source:

2019 American Community Survey Public Use Micro-data
Sample (5% Sample), December 2021

OUTLOOK AND PROJECTIONS



All of the top 11 occupations in the state with the greatest number of projected average annual job openings can work within retail. The typical minimum requirements for these occupations are no work experience, short-term on-the-job training and no college degree.

The eleven occupations account for nearly one-quarter (24.9% or 133,810) of all average annual job openings that New Jersey is expected to add through 2028.

<u>Occupation</u>	Employment		Change 2018-2028		Annual Average Job Openings
	<u>2018</u>	<u>2028</u>	<u>Number</u>	<u>Percent</u>	<u>Total</u>
	<u>Actual</u>	<u>Projected</u>			
Total, All Occupations	4,400,060	4,649,570	249,510	5.7	537,520
Laborers and Freight, Stock, and Material Movers, Hand	141,760	156,860	15,100	10.7	22,250
Retail Salespersons	132,200	127,630	-4,570	-3.5	18,520
Cashiers	99,430	91,840	-7,590	-7.6	17,280
Waiters and Waitresses	60,280	66,560	6,280	10.4	12,800
Janitors and Cleaners, Except Maids and Housekeeping Cleaners	71,920	76,820	4,900	6.8	10,280
Combined Food Preparation and Serving Workers, Including Fast Food	46,070	55,560	9,490	20.6	10,000
Customer Service Representatives	69,960	68,180	-1,780	-2.5	9,030
Stock Clerks and Order Fillers	67,810	67,550	-260	-0.4	8,980
Counter Attendants, Cafeteria, Food Concession, and Coffee Shop	35,780	38,600	2,820	7.9	8,350
Receptionists and Information Clerks	56,440	60,930	4,490	8.0	8,330
Office Clerks, General	69,910	67,570	-2,340	-3.3	7,990



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Source: NJLWD, Current Employment Statistics,
Industry & Occupational Employment Projections,
2018-2028

NEW JERSEY, 2018– 2028

PROJECTED EMPLOYMENT CHANGE BY INDUSTRY

<u>Industry Title (Two-Digit NAICS)</u>	Change: 2018 -2028			
	<u>2018 Jobs</u>	<u>2028 Jobs</u>	<u>Number</u>	<u>Percent Annual</u>
Total Nonfarm	4,158,700	4,390,680	231,980	0.5
Healthcare and Social Services	606,400	692,270	85,870	1.3
Accommodation and food services	319,200	357,130	37,930	1.1
Professional , Scientific and Technical Services	303,000	328,810	25,810	0.8
Transportation and warehousing	197,500	221,040	23,540	1.1
Administrative and Support and Waste Management and Remediation	287,800	307,580	19,780	0.7
Educational services	417,500	437,040	19,540	0.5
Management of Companies and Enterprises	84,900	98,690	13,790	1.5
Other Services	171,100	182,780	11,680	0.7
Construction	158,000	169,440	11,440	0.7
Arts, Entertainment and Recreation	68,400	79,840	11,440	1.6
Wholesale trade	214,500	220,730	6,230	0.3
Manufacturing	249,800	254,220	4,420	0.2
Utilities	15,300	16,300	1,000	0.6
Natural Resources and Mining	1,300	1,350	50	0.4
Finance and insurance	191,400	191,310	-90	0.0
Real estate and rental and leasing	59,900	58,300	-1,600	-0.3
Government	286,300	277,320	-8,980	-0.3
Information	69,700	56,300	-13,400	-2.1
Retail Trade	456,800	440,240	-16,560	-0.4

Note: Total nonfarm employment excludes self-employed and unpaid family workers.

➤ Based on official employment projections for New Jersey's industries prepared by the Department of Labor and Workforce Development, payrolls in Retail Trade (in red) are projected to decrease the most (-16,560) from 2018-to-2028.

➤ Meanwhile, the state's rate of job growth for all industries was 5.6%

NOTE: Employment data are rounded to the nearest hundred. Percentages and percent changes are based on unrounded data.



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Source: NJLWD, Current Employment Statistics, Industry & Occupational Employment Projections, 2018 - 2028,
Prepared by: New Jersey Department of Labor and Workforce Development, Workforce Research & Analytics

NEW JERSEY, 2018 – 2028

PROJECTED EMPLOYMENT CHANGE IN RETAIL TRADE INDUSTRY

NAICS Industry		2018 Estimated Employment	2028 Projected Employment	Numeric Change	Annual Growth Rate
<u>Code</u>	<u>Industry Title</u>				
44-45	Retail Trade	456,800	440,240	-16,560	-0.4
441	Motor Vehicle and Parts Dealers	49,300	47,990	-1,310	-0.3
444	Building Material & Garden Equipment & Supplies	32,800	34,670	1,870	0.6
445	Food and Beverage Stores	112,700	107,020	-5,680	-0.5
446	Health and Personal Care Stores	38,400	39,240	840	0.2
448	Clothing and Clothing Accessories Stores	50,100	45,890	-4,210	-0.9
451	Sporting Goods, Hobby, Book, and Music Stores	14,100	10,530	-3,570	-2.9
452	General Merchandise Stores	73,800	67,910	-5,890	-0.8
459	Retail Trade, All Other	85,600	87,000	1,400	0.2

➤ Building Material and Garden Equipment and Supplies' Dealers is expected to lead Retail Trade through 2028 (+1,870 jobs) with Retail Trade, All Other adding the second most at 1,400.

NOTE: Employment data are rounded to the nearest hundred. Percentages and percent changes are based on unrounded data.



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Source: NJLWD Current Employment Statistics, Industry & Occupational
Employment Projections, 2018 - 2028
Prepared by: New Jersey Department of Labor and Workforce
Development, Workforce Research & Analytics

Outlook

- Along with other service sectors such as the hospitality industry, retail is a critical point of entry, or “gateway,” into the labor force and provides workers with foundational skills in customer service, punctuality, and responsibility.
- The retail industry offers substantial employment opportunities. Part-time and temporary work is plentiful across a range of employers, from small, independent retailers to national and multinational retail chains. Solid store experience can lead to an array of retail management and store support career ladders.
- A college degree can afford direct entry into management training programs and regional/corporate level career paths.



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RETAIL TRADE

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