HARDI

Keeping America Comfortable

A BASELINE ECONOMIC IMPACT ANALYSIS OF HVACR WHOLESALE DISTRIBUTION ACROSS ALL 50 STATES

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HVACR Wholesale Distribution at a Glance

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Executive Summary

Heating, ventilation, air conditioning, and refrigeration (HVACR) wholesale distributors play a critical but often underappreciated role in the U.S. economy. By maintaining local inventory, providing logistics and technical expertise, and ensuring contractors have timely access to equipment and replacement parts, distributors form the essential link between manufacturers and the professional technicians who install and service heating, cooling, and refrigeration systems. Despite this central role, relatively little research has focused specifically on the economic contribution of the HVACR wholesale distribution segment. Existing studies—including work commissioned by AHRI and HARDI's own State of the Channel Report—provide valuable insights into industry size, market trends, and workforce dynamics, but do not isolate HVACR wholesale distribution as a distinct economic sector using a state-level input-output modeling framework.

This study addresses that gap by establishing the first comprehensive, state-by-state estimate of the industry's direct economic contribution. Using IMPLAN's industry-standard input-output modeling platform together with detailed data from the 2022 U.S. Economic Census, the analysis isolates HVACR wholesale distribution from the broader wholesale trade sector to produce transparent, replicable estimates of employment, output, value added, and employee compensation.

The study finds that HVACR wholesale distribution directly supports 101,817 jobs, generates $32.9 billion in annual economic output (the value added through distributors' own sales and distribution activity, not the retail value of equipment sold), contributes $17.8 billion in value added to the U.S. economy, and pays $8.7 billion in employee compensation. These economic benefits extend across all 50 states and the District of Columbia, reflecting the industry's extensive branch network and its need to locate inventory close to the contractors and communities it serves.

Beyond quantifying economic activity, the analysis also highlights an important workforce challenge. HVACR distribution is fundamentally an operations-driven industry, with warehouse employees, delivery drivers, and counter sales personnel comprising the majority of its workforce. Based on HARDI's Cross-Industry Compensation & Benefits Study, distributors must hire and train approximately 18,268 employees each year—or roughly 1,522 every month—to maintain current employment levels. Recruiting, training, and retaining skilled operational employees therefore represents one of the industry's most significant long-term challenges.

The findings presented here establish a baseline for measuring the industry's economic contribution and provide HARDI members, policymakers, and other stakeholders with a consistent framework for understanding the scale and importance of HVACR wholesale distribution. As new Economic Census and IMPLAN data become available, this methodology can be updated to track changes in the industry's economic footprint over time and to support informed decision-making on workforce, regulatory, and economic policy issues affecting the HVACR supply chain.

Headline Findings

- 101,817 direct jobs supported nationwide
- $32.9 billion in annual economic output

- $17.8 billion in value added to the U.S. economy
- $8.7 billion in employee compensation
- Approximately 18,300 workers must be hired and trained annually to sustain current employment

HVACR wholesale distribution is more than a supply chain intermediary. It is a nationally distributed economic engine that supports tens of thousands of jobs, billions of dollars in economic activity, and the reliable operation of the heating, cooling, and refrigeration systems on which homes, businesses, and critical facilities depend every day.

Introduction

HARDI represents the wholesale distribution channel of the HVACR industry — the companies that purchase equipment, parts, and supplies from manufacturers and sell them to the contractors who install and service heating, cooling, and refrigeration systems in homes and businesses across North America. HARDI members range from single-location regional distributors to national multi-branch operations, collectively forming the essential logistics and supply backbone of the industry.

Despite the centrality of this role, the distribution segment of the HVACR value chain has historically received less dedicated economic analysis than the manufacturing or contracting segments on either side of it. Existing research—including HARDI's own State of the Channel Report and economic contribution studies commissioned by industry organizations—has provided valuable insights into the size and importance of the HVACR market. Most notably, the Air-Conditioning, Heating, and Refrigeration Institute (AHRI) commissioned an independent economic contribution study that estimated the national and state-level economic impacts of HVACR equipment manufacturing and the downstream wholesale and retail distribution of those products. While that study established an important benchmark for the industry's overall economic contribution, it relied on the Bureau of Economic Analysis' Regional Input-Output Modeling System (RIMS II). It was designed to measure the broader manufacturing value chain rather than develop a replicable methodology specifically for HVACR wholesale distribution.

This study builds upon that foundation by using IMPLAN, the industry-standard platform for regional economic contribution analysis, combined with detailed industry data from the U.S. Census Bureau's Economic Census, to establish a baseline measurement of HVACR wholesale distribution's direct economic footprint—nationally and in every state. The resulting estimates align closely with AHRI's independently developed employment estimates, providing external validation of the industry allocation methodology while offering a transparent framework that can be readily updated as new economic data become available. The goals of this study are threefold:

1. Document the direct economic footprint of HVACR wholesale distribution in the United States, in terms of jobs, output, value added, and compensation
2. Provide state-level estimates that HARDI members, policymakers, and other stakeholders can use for advocacy, benchmarking, and planning purposes
3. Establish a replicable methodology that can be updated in future years to track the channel's economic trajectory over time

This report is intended to be read alongside an interactive StoryMap that allows readers to explore the state-level findings visually and geographically. This white paper itself is intended as the primary narrative resource — providing the methodology, findings, and context in a single, self-contained document for readers across HARDI's membership, the policy community, and the broader industry press.

Methodology

This study measures the direct economic contribution of HVACR wholesale distribution using IMPLAN, an economic modeling platform widely used for regional and industry contribution analysis in the United States. IMPLAN works by combining detailed government economic data, including data from the U.S. Bureau of Economic Analysis and Bureau of Labor Statistics, into models that estimate how economic activity in a given industry translates into jobs, income, and output within a specific state or region. It is the same type of tool used by universities, government agencies, and consulting firms to measure the economic footprint of everything from major employers to entire industries, and it is widely regarded as the standard platform for this kind of analysis. IMPLAN's models are built on detailed input-output accounts maintained for each U.S. state, allowing this study to generate independent estimates of jobs, output, value added, and compensation for HVACR distribution for the United States as a whole and in every state.

ISOLATING HVACR DISTRIBUTION IN IMPLAN

IMPLAN classifies economic activities into a proprietary system of industry sectors that do not correspond directly to the commonly used six-digit North American Industry Classification System (NAICS) codes. HVACR distribution — comprising NAICS 423730 (Warm Air Heating and Air-Conditioning Equipment and Supplies Merchant Wholesalers) and NAICS 423740 (Refrigeration Equipment and Supplies Merchant Wholesalers) — is captured within a broader IMPLAN sector, Industry 379: Wholesale Trade – Other Durable Goods Merchant Wholesalers. This sector also includes other durable goods wholesalers that fall outside HVACR distribution.

Applying IMPLAN's Industry 379 figures directly would therefore overstate the economic contribution of HVACR distribution specifically, since it would include unrelated wholesale activity. To isolate the HVACR-specific share of this sector, this study developed a share factor using detailed data from the U.S. Census Bureau's Economic Census.

Deriving the Share Factor

The share factor for this study is derived from the U.S. Census Bureau's 2022 Economic Census, Table EC2242BASIC and cross-referenced against IMPLAN's official 2022 NAICS-to-Industry bridge file to confirm the complete set of NAICS codes comprising IMPLAN Industry 379.

This study calculated the share factor using sales figures for all establishment types, including manufacturers' sales branches and offices — distribution points operated directly by equipment manufacturers such as Carrier, Trane, and Lennox — alongside independent merchant wholesalers. This total-establishments basis was applied consistently to both the numerator and denominator of the share factor calculation, ensuring the result is not skewed by how a given company structures its sales operations.

IMPLAN Industry 379 (Wholesale Trade – Other Durable Goods Merchant Wholesalers) is not limited to HVACR-related NAICS codes. It aggregates 17 distinct six-digit NAICS codes spanning furniture and home furnishings, construction materials, metals and minerals, hardware and plumbing/heating equipment, and miscellaneous durable goods. HVACR distribution, which is defined for this study as the combination of NAICS 423730 (Warm Air Heating and Air-Conditioning Equipment and Supplies Merchant Wholesalers) and NAICS 423740 (Refrigeration Equipment and Supplies Merchant Wholesalers), represents just one component within this larger base.

On this basis, the study calculated:

- Combined sales for NAICS 423730 and 423740 (all establishments): $106.6 billion
- Total sales across all 17 NAICS codes comprising IMPLAN Industry 379 (all establishments): $1.458 trillion

This yields a share factor of 7.3% ($106.6B ÷ $1.458 trillion), which was applied to each state's IMPLAN Industry 379 output, employment, value added, and compensation figures to isolate the portion attributable to HVACR distribution specifically.

Because six-digit NAICS sales data is suppressed at the state level in the Economic Census, this study applies the national 7.3% share factor uniformly across all 50 state models and the District of Columbia rather than deriving a state-specific factor for each. To evaluate whether this uniform approach introduces meaningful bias, the study conducted a robustness check using 2022 County Business Patterns establishment counts, a Census dataset published at the state level, for the same 17 NAICS codes comprising IMPLAN Industry 379. On an establishment-count basis, HVACR distribution (NAICS 423730 and 423740) represents 8.35% of Industry 379 nationally, reasonably close to the 7.3% dollar-based figure and supporting the reliability of the national share factor. State-level establishment shares ranged from 3.0% to 16.4%, indicating some genuine state-to-state variation exists.

This variation was tested against population-weighted cooling and heating degree days (U.S. Energy Information Administration, 2024) as a potential explanatory factor, given that climate-driven cooling and heating demand could plausibly cause HVACR's share of wholesale distribution to differ by region. The relationship was weak in both cases ($R^2 = 0.08$ for cooling degree days; $R^2 = 0.08$ for heating degree days), indicating that climate is not the primary driver of the observed state-level variation. Differences in each state's broader wholesale trade industry composition, rather than climate, are a more likely explanation.

As an additional check, the authors tested whether a margin-based share factor would differ meaningfully from the sales-based 7.3% figure, since IMPLAN models wholesale trade output as gross margin, not gross sales. Using 2022 Economic Census data, HVACR distribution carries a higher gross margin (35.7%) than the rest of Industry 379's available codes (28.8%), suggesting the sales-based factor is likely conservative rather than inflated. Margin data is unavailable for manufacturers' sales branches and three of the seventeen NAICS codes, so a complete margin-based factor could not be calculated; given the direction of the bias and these data limitations, the sales-based factor was retained.

Scope and Interpretation of Findings

The figures in this report reflect the direct economic effects of HVACR distribution only. In other words, it only focuses on the jobs and economic activity generated by distributors themselves.[1] It is important to note that this study's output figures for wholesale trade are reported on a margin basis, reflecting the value distributors add through their sales and distribution function, not the full wholesale value of the equipment passing through their hands.[2] For context, manufacturer output reflects the value of goods produced; distributor output reflects the margin earned moving those goods to contractors; and contractor output reflects the value of installed labor and service. This report focuses only the distributor segment of that chain.

Because HVACR distribution is not a standalone government-tracked industry classification, all figures in this report are estimates derived through the methodology described above, rather than directly reported statistics. This methodology was designed to produce the most defensible and replicable estimate possible given available data. Its results were checked at multiple points against other HARDI-published research — including the State of the Channel Report and the Cross-Industry Compensation & Benefits Study — to confirm the figures presented here are consistent with what HARDI already knows about its membership and the broader industry.

EMPLOYMENT ESTIMATES: QCEW VS. IMPLAN

While this study relies on IMPLAN for output, value added, and compensation figures, employment figures presented in this report are drawn instead from the U.S. Bureau of Labor Statistics' Quarterly Census of Employment and Wages (QCEW) wherever available, rather than from IMPLAN's modeled employment estimates.

This distinction matters because of how the share factor is constructed. The share factor described above is derived from sales data — HVACR distribution's share of total sales within IMPLAN Industry 379. Applying that same percentage to Industry 379's output, value added, and compensation figures is appropriate, since all three are themselves revenue-based measures. Applying it to Industry 379's employment total, however, implicitly assumes that HVACR distribution requires the same number of workers per dollar of sales as the other durable goods categories bundled into Industry 379, such as furniture, construction materials, and metal service centers. There is no reason to expect this assumption to hold, since labor intensity varies meaningfully across different types of wholesale distribution.

To test this assumption, this study compared IMPLAN's share-factor-derived national employment estimate (85,218 jobs) against QCEW's directly reported employment for NAICS 423730 and 423740 combined (101,488 jobs, Q4 2025 average, private ownership). QCEW is not a model or a sample-based estimate; it is an administrative count of employment, reported by employers for state unemployment insurance purposes and covering approximately 95% of U.S. jobs. The two figures differ by roughly 19%, consistent with the expectation that HVACR distribution is more labor-intensive per dollar of sales than the

[1] This study does not include indirect effects (economic activity generated at distributors' suppliers) or induced effects (economic activity generated by household spending of distribution-industry wages). IMPLAN can estimate both separately, but they are outside the scope of this baseline study.

[2] Wholesale trade industries are conventionally measured in IMPLAN and similar input-output models on a margins basis, reflecting the wholesaler's markup rather than the full sale price of goods passing through the channel. This is standard practice for wholesale and retail trade sectors in economic contribution analysis.

broader mix of industries in IMPLAN Industry 379, causing the sales-based share factor to understate employment specifically.

Given this, this study reports QCEW-based employment figures nationally and in the 46 states where six-digit NAICS-level QCEW data is publicly disclosed. In five jurisdictions (Alaska, Rhode Island, Vermont, Wyoming, and the District of Columbia), QCEW suppresses six-digit NAICS employment data to protect the confidentiality of the small number of establishments operating there; for these five jurisdictions only, this study reports IMPLAN's share-factor-derived employment estimate as the best available substitute.[3]

National Findings

Across the United States, HVACR wholesale distribution directly supports 101,817 jobs and generates $32.9 billion in total economic output — a measure of the total value of goods sold and services provided by HVACR distributors each year. This makes HVACR distribution a meaningful and identifiable contributor to the U.S. economy, supporting a workforce on par with other well-known professional or specialty industries operating throughout the country.

Table 1: National Economic Contribution of the HVACR Wholesale Distribution Channel

Metric	
Direct Jobs	101,817
Total Output	$32.9 billion
Value Added	$17.8 billion
Wage and Salary Income	$7.6 billion
Total Employee Compensation	$8.7 billion

Source: IMPLAN economic modeling software (2024 data year), adjusted using the study's 7.3% share factor.

IMPLAN estimates HVACR distribution's economic output at $32.9 billion. This figure represents the value distributors add through the work of distributing those goods — warehousing, logistics, sales, financing, and service — on a basis that is standard for measuring wholesale trade industries. When compared with HARDI's State of the Channel Report estimate of $106 billion in total sales to contractors in 2025, this $32.9 billion output figure offers a complementary measure separating the value of wholesale distribution from the value of the good sold. Viewed together, the two figures are consistent with one another: a distribution gross margin of roughly 31% on $106 billion in contractor purchases is well within the range typical of wholesale distribution, reinforcing the credibility of both figures.

Of that $32.9 billion, $17.8 billion represents value added, which is a more precise measure of the distribution industry's own economic contribution. Value added strips out the cost of the overhead goods and services distributors purchase to run their businesses (supplies, machinery, utilities, and services) and isolates the value that distributors themselves create through their work: warehousing, logistics, sales expertise, credit and financing, technical support, and the labor of their employees. Economists generally consider value added the most meaningful way to measure what an industry contributes to the economy, since it avoids counting the same economic activity twice as it moves through the supply chain.

[3] Because employment for most states comes from QCEW while output, value added, and compensation continue to come from IMPLAN, per-job compensation figures calculated at the state level (dividing IMPLAN-modeled compensation by QCEW-reported employment) can vary widely and should not be interpreted as a reliable measure of state-by-state wage differences. The national blended per-job compensation figure reported in this study reflects the same reconciliation and is considered reliable.

HVACR distribution also translates directly into worker compensation. We estimate distributors paid $8.7 billion in total employee compensation in the most recent data year, including $7.6 billion in wages and salaries and the remainder in employer-paid benefits, payroll taxes, and other compensation. On a per-job basis, this works out to be about $86,000 in average total compensation per direct job. This figure reflects an industry providing substantive, full-career employment rather than a marginal or part-time workforce.

This per-job figure is slightly higher than the incumbent-weighted average reported in HARDI's own Cross-Industry Compensation & Benefits Study, which shows approximately $79,600 across surveyed positions — a gap that is largely explained by differences in what each figure measures rather than by any inconsistency in the underlying data. IMPLAN's compensation measure captures the full cost of employing a worker, including employer-side payroll taxes and benefit costs the survey may not fully capture, and it includes all compensation paid within the industry, including to owners and executives classified as employees, whereas the survey's average excludes executive compensation entirely.

Taken together, these figures describe an industry that, while operating largely out of public view relative to the manufacturers whose products it sells or the contractors who install them, represents a labor market and economic base of real scale.

State and Regional Findings

While HVACR wholesale distribution activity is present in every state, it is not distributed evenly. The industry's economic footprint tracks broader patterns of population, housing stock, and climate — states with large populations, significant new construction, and climates that drive heavy HVAC demand tend to host a disproportionate share of the industry's output and employment.

The table below summarizes impacts for the Top 10 states by economic output. These states together account for 57% of the industry's total economic output, despite representing only a fifth of all states — reflecting both their scale as economies and, for several Sun Belt markets in particular, climates that drive sustained cooling demand. Appendix A provides a detailed breakdown of the HVACR distribution industry's impact for these and all other states.

Table 2: Top 10 States by HVACR Distribution Output

Rank	State	Output	Direct Jobs	Employee Compensation
1	**California**	$3.75B	7,276	$975.2M
2	**Texas**	$3.68B	14,864	$977.0M
3	**Florida**	$2.26B	9,115	$596.3M
4	**New York**	$1.76B	4,812	$487.7M
5	**Illinois**	$1.48B	3,075	$397.2M
6	**Ohio**	$1.34B	3,159	$355.2M
7	**Georgia**	$1.27B	3,595	$313.6M
8	**New Jersey**	$1.11B	2,563	$296.9M
9	**Pennsylvania**	$1.10B	2,389	$276.0M
10	**North Carolina**	$1.08B	3,388	$295.4M

Source: Output and Employee Compensation from IMPLAN economic modeling software (2024 data year), adjusted using the study's 7.3% share factor. Direct Jobs from BLS QCEW (NAICS 423730+423740, all ten states shown), see Methodology.

Industry Context

Unlike many industries whose economic activity is concentrated around manufacturing plants, corporate headquarters, or major metropolitan areas, HVACR distribution operates through an extensive network of local branches. Contractors depend on immediate access to equipment, replacement parts, and technical support, making proximity to customers a competitive necessity rather than an operational preference.

As a result, HVACR distributors maintain inventory and logistics capabilities in communities of every size across the country. Rather than consolidating operations into a limited number of regional hubs, distributors locate where construction activity and contractor demand exist, providing same-day or next-day access to products that are often needed to restore heating, cooling, and refrigeration systems with minimal downtime.

The industry's employment, wages, and economic output are broadly distributed across all 50 states and the District of Columbia, supporting local economies far beyond the nation's largest metropolitan areas. HVACR distribution is therefore not simply a conduit between manufacturers and contractors—it is a geographically dispersed infrastructure that enables the HVACR market to function efficiently nationwide.

The Workforce Issue

Behind every unit shipped, delivered, and installed is a distributor workforce whose composition and challenges shape the industry's economic footprint. IMPLAN estimates that footprint in terms of employment and economic contribution; HARDI's Cross-Industry Compensation & Benefits Study fills in the picture of who makes up that workforce and where distributors face their greatest labor challenges.

As illustrated in Table 4 below, HVACR distribution is fundamentally an operations-driven industry. Warehouse employees, delivery drivers, and counter sales personnel account for the vast majority of reported positions, with warehouse and driver roles alone representing nearly two-thirds of all employees tracked in the survey. Rather than being concentrated in administrative or executive functions, employment is centered on the movement of products and the day-to-day support of contractors through logistics, inventory management, and customer service.

These operational roles are also the most difficult to staff and retain. In 2025, HARDI members reported an average turnover rate of 22.4% for operations and warehouse employees, with open positions taking an average of 34 days to fill. More broadly, 44.7% of distributors identified finding qualified employees as one of their top business concerns—the most frequently cited challenge in the survey, exceeding concerns about healthcare costs or rising operating expenses. The industry's economic contribution therefore depends not only on existing employment, but on distributors' ability to recruit, train, and retain a skilled workforce.

Based on the industry's weighted occupational composition, HVACR distribution experiences an estimated blended annual turnover rate of 17.9%. Applied to this study's estimate of direct jobs, that translates into approximately 18,300 employees who must be hired and trained each year to maintain current employment levels, before accounting for any business expansion. Because operations and warehouse positions comprise both the largest share of employment and the highest turnover rate, they represent the industry's most significant

workforce development challenge. Investments in recruiting, onboarding, and employee retention are therefore critical not only for individual distributors, but for sustaining the industry's broader economic contribution.

Table 3: Estimated Annual Workforce Turnover by Occupational Category

Occupational Category	Share of Workforce	2025 Turnover Rate	Implied Hiring Demand
Operations/Warehouse	65.1%	22.4%	14,837
Sales	20.9%	10.5%	2,231
Office/Admin	10.8%	9.0%	987
Management	3.3%	6.4%	214
Total	100%	17.9% (blended)	18,268

Source: HARDI Cross-Industry Compensation & Benefits Study (occupational shares based on incumbent counts across 55 tracked positions; turnover rates as reported by category) applied to this study's estimate of 85,218 direct jobs.

Looking Ahead

This study establishes, for the first time, a rigorous, state-by-state baseline of the direct economic contribution of HVACR wholesale distribution in the United States. Using IMPLAN's industry-standard input-output modeling platform together with detailed U.S. Census Bureau and Bureau of Labor Statistics data, the analysis finds that HVACR distributors directly support 101,817 jobs, generate $32.9 billion in economic output, and pay $8.7 billion in employee compensation nationwide. These findings quantify the economic significance of an industry that operates in every state and every HARDI region, providing the logistics and supply infrastructure that connects manufacturers with the contractors who install and service HVACR systems.

The results are also consistent with other industry research. Estimates presented here are consistent with findings from HARDI's State of the Channel Report and the Cross-Industry Compensation & Benefits Study, and this study's wholesale-only employment figures fall appropriately below the combined wholesale-and-retail estimates in independent analyses commissioned by AHRI, as expected for a subset of a broader distribution channel. While each study was developed for a different purpose and relies on different underlying data, the consistency of their findings provides additional confidence in the magnitude and composition of the industry's economic footprint.

Beyond measuring economic contribution, this analysis highlights an important workforce challenge. Based on the occupational composition of HVACR distribution and observed turnover rates, the industry must hire and train approximately 18,268 workers each year to maintain its current employment base. Because operations and warehouse positions account for most employment and experience the highest turnover, workforce recruitment, training, and retention represent one of the industry's most significant long-term strategic priorities.

This report is intended to serve as a baseline rather than a one-time estimate. As new Economic Census, QCEW, and IMPLAN data become available, HARDI plans to refresh this analysis, allowing members, policymakers, and other stakeholders to measure how the industry's economic contribution evolves. Future editions may also examine additional dimensions of HVACR distribution, including its role within the broader HVACR value chain and the economic implications of emerging policy issues such as tariffs, refrigerant regulations, and other market developments.

Although HVACR wholesale distribution operates largely behind the scenes, its economic role is substantial. Every day, distributors ensure that contractors have timely access to the equipment, parts, and supplies needed to install, maintain, and repair the systems that keep homes, businesses, hospitals, schools, and industrial facilities operating. This study demonstrates that the industry's contribution extends well beyond its supply-chain function—it is a major employer, a significant source of economic activity, and an essential component of the nation's built environment.

Appendix A: State-by-State Summary

State	Output ($)	Value Added ($)	Wage & Salary ($)	Total Employee Compensation ($)	Jobs
Alabama	$470,383,512	$252,368,839	$100,603,918	$116,194,730	1,202
Alaska*	$20,687,769	$8,998,604	$4,489,377	$5,185,105	63
Arizona	$637,716,410	$326,081,725	$151,876,624	$175,413,279	2,472
Arkansas	$263,989,258	$137,660,235	$56,255,179	$64,973,168	1,105
California	$3,750,681,316	$2,095,998,002	$844,349,281	$975,199,953	7,276
Colorado	$670,987,602	$357,323,807	$181,042,237	$209,098,752	2,481
Connecticut	$356,357,455	$203,962,633	$84,793,309	$97,933,915	1,077
Delaware	$69,219,530	$34,924,344	$15,236,170	$17,597,353	315
Washington D.C.*	$16,847,128	$11,338,511	$4,584,527	$5,295,002	31
Florida	$2,257,714,256	$1,227,445,708	$516,246,902	$596,250,823	9,115
Georgia	$1,273,351,515	$720,905,451	$271,520,424	$313,598,543	3,595
Hawaii	$83,733,393	$37,610,353	$19,488,892	$22,509,129	318
Idaho	$174,289,973	$90,957,849	$39,520,868	$45,645,504	451
Illinois	$1,480,328,479	$830,240,373	$343,914,985	$397,212,249	3,075
Indiana	$769,020,714	$392,357,137	$180,010,174	$207,906,748	2,339
Iowa	$258,393,383	$128,785,576	$59,874,621	$69,153,523	883
Kansas	$240,862,430	$125,126,210	$56,202,593	$64,912,433	1,067
Kentucky	$415,032,448	$218,432,493	$92,151,278	$106,432,165	1,829
Louisiana	$338,376,319	$172,429,283	$73,426,902	$84,806,031	1,203
Maine	$97,236,554	$46,330,967	$21,721,289	$25,087,485	319
Maryland	$463,357,193	$261,978,775	$99,078,176	$114,432,539	1,687
Massachusetts	$595,982,383	$330,720,413	$156,644,188	$180,919,683	1,364
Michigan	$916,454,293	$478,052,336	$220,254,808	$254,388,182	3,200
Minnesota	$727,435,148	$413,208,143	$182,479,234	$210,758,444	1,673
Mississippi	$173,487,621	$81,924,449	$36,843,143	$42,552,806	594
Missouri	$665,684,650	$336,478,070	$146,050,986	$168,684,829	2,978
Montana	$90,231,069	$44,143,729	$21,372,311	$24,684,425	184
Nebraska	$187,223,007	$105,593,345	$37,409,119	$43,206,493	855
Nevada	$271,605,590	$147,266,418	$67,620,052	$78,099,281	801
New Hampshire	$149,861,604	$83,393,618	$37,302,732	$43,083,619	298
New Jersey	$1,105,607,411	$604,750,971	$257,079,720	$296,919,931	2,563
New Mexico	$107,199,839	$45,307,979	$22,396,397	$25,867,216	320
New York	$1,763,754,651	$949,708,977	$422,265,646	$487,705,085	4,812
North Carolina	$1,082,959,209	$554,098,180	$255,751,729	$295,386,139	4,388
North Dakota	$66,173,479	$32,834,149	$16,546,461	$19,110,703	246
Ohio	$1,343,738,727	$687,603,377	$307,546,397	$355,207,541	3,159
Oklahoma	$248,435,370	$122,864,066	$55,894,061	$64,556,087	882
Oregon	$374,670,896	$192,691,043	$92,753,862	$107,128,132	671
Pennsylvania	$1,098,981,349	$603,327,304	$238,957,216	$275,988,943	3,389
Rhode Island*	$89,450,071	$48,584,991	$19,791,143	$22,858,220	231
South Carolina	$545,600,788	$295,543,699	$110,593,330	$127,732,222	1,397
South Dakota	$71,660,734	$34,900,982	$16,649,265	$19,229,438	345

Tennessee	$740,255,620	$399,040,921	$170,730,206	$197,188,642	2,368
Texas	$3,677,204,437	$2,049,271,035	$845,881,888	$976,970,070	14,864
Utah	$389,151,520	$202,988,034	$86,147,332	$99,497,774	777
Vermont*	$40,400,180	$19,150,640	$8,989,665	$10,382,814	115
Virginia	$635,870,321	$357,533,825	$137,689,760	$159,027,845	2,437
Washington	$804,290,099	$465,806,989	$189,390,598	$218,740,877	2,243
West Virginia	$94,738,250	$44,349,381	$18,689,523	$21,585,880	207
Wisconsin	$661,822,905	$328,161,539	$162,043,797	$187,156,081	2,478
Wyoming*	$26,260,192	$11,165,042	$5,584,308	$6,449,720	75
National Total	**$32,854,758,052**	**$17,751,720,523**	**$7,563,736,600**	**$8,735,905,554**	**101,817**

Note: Jobs figures marked with an asterisk (Alaska, Rhode Island, Vermont, Wyoming, and the District of Columbia) are IMPLAN-modeled estimates rather than direct QCEW counts. BLS suppresses QCEW employment data at the six-digit NAICS level (423730 and 423740) when disclosure would risk identifying individual establishments — a common outcome in states with very few HVACR distributors. For these five jurisdictions, employment was instead derived by applying the national IMPLAN Industry 379 share factor to each state's modeled Industry 379 employment total. All other states' jobs figures reflect actual QCEW employment counts for NAICS 423730 and 423740.