



WBJ MANUFACTURING AWARDS | 2026

The Massachusetts Manufacturing Landscape

Three years of Voice of the Manufacturer survey data — 2023, 2024, 2025.

651 manufacturer responses across all nine MA congressional districts.

Kathie Mahoney President, MassMEP

Celebrating 30 Years of Manufacturing Excellence

Your manufacturing trusted advisor — celebrating 30 years.

MassMEP

Established in 1996, MassMEP is a nonprofit dedicated to helping small and mid-sized Massachusetts manufacturers achieve growth through capacity and capability improvement.

Manufacturing Extension Partnership (MEP)

A public–private partnership with Centers in all 50 states and Puerto Rico — dedicated to serving small and medium-sized U.S. manufacturers.

How we work with you

Shared Purpose

Tailored solutions that empower SMM manufacturers to drive growth in the Commonwealth.

Partnership

Unlike traditional consultants, we work alongside you to implement the recommendations we deliver.

Unparalleled Expertise

20 advisors • 400+ combined years of manufacturing experience.

Connections

A vast, well-connected network across business, government, and academia.

OUR TEAM

Seasoned, empathetic, and built alongside manufacturers.

We understand the unique challenges and opportunities of the manufacturing sector. Unlike traditional consultants, we work alongside you — every step of the way.



20

advisors on staff



400+

years of collective
manufacturing experience



Kathie Mahoney — President, MassMEP

ABOUT

A champion for Massachusetts manufacturers — leading MassMEP's mission to strengthen, modernize, and grow the Commonwealth's manufacturing base.



My Beliefs



Manufacturing as an Economic Driver

An engine of innovation, job creation, and careers that support a living wage.



Empowering Small & Mid-Sized Manufacturers

Helping SMMs modernize, adopt new technologies, and compete globally.



Developing the Workforce of the Future

Training, skills, and inclusive access to careers in manufacturing.



Local Impact & Buy-Local Advocacy

A strong proponent of buying local and reinforcing community supply chains.



Resilience & Innovation

Staying agile and innovative against shifting trade policies and tech disruption.

A sector that still anchors the Commonwealth.

7.9%

of the Massachusetts GDP comes from manufacturing.

Manufacturing employment is concentrated across every corner of the state — from the Berkshires to the South Coast.

Regional strengths

Western MA

Metal fabrication • chemicals • plastics • paper • firearms

Central MA

IT • medical device • metal stamping • abrasives • food

Northeast MA

Medical • semiconductor • pharma • aerospace • biotech

Southeast MA

Medical • steel/metal • plastics • apparel • specialty food

Approximately how many manufacturers are in Massachusetts?

A

1,000

B

3,000

C

6,000

D

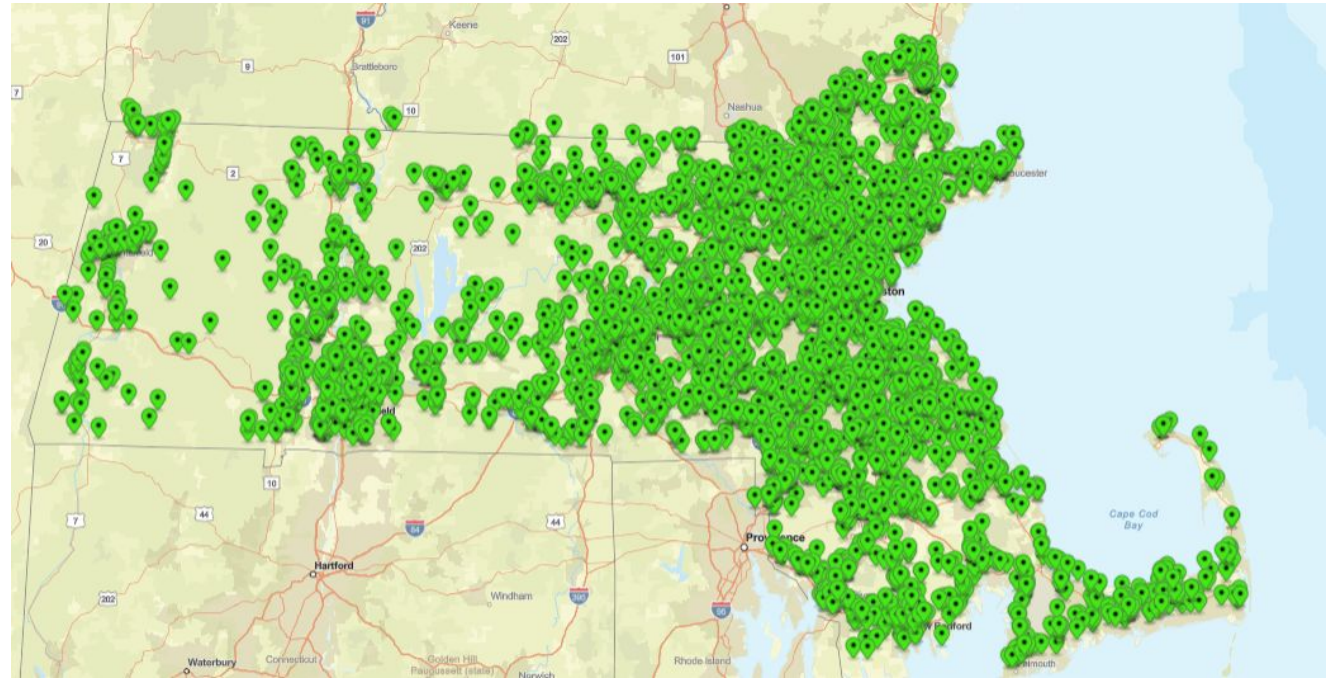
10,000

Take a guess — we'll show the answer on the next slide.

MASSACHUSETTS MANUFACTURING

Massachusetts is home to approximately

6,000
manufacturers



That's roughly one for every 1,200 residents — touching every corner of the Commonwealth.

Diverse sectors. Statewide footprint.

Manufacturing in Massachusetts is not a single industry — it's a portfolio. Each region anchors a different mix of strengths.



Medical Device

Implants • diagnostics • surgical instruments



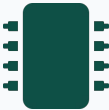
Life Sciences & Pharma

Bioprocessing • therapeutics • lab equipment



Defense & Aerospace

Avionics • precision components • systems



Semiconductor & Electronics

Photonics • PCBs • specialty optics



Food & Specialty

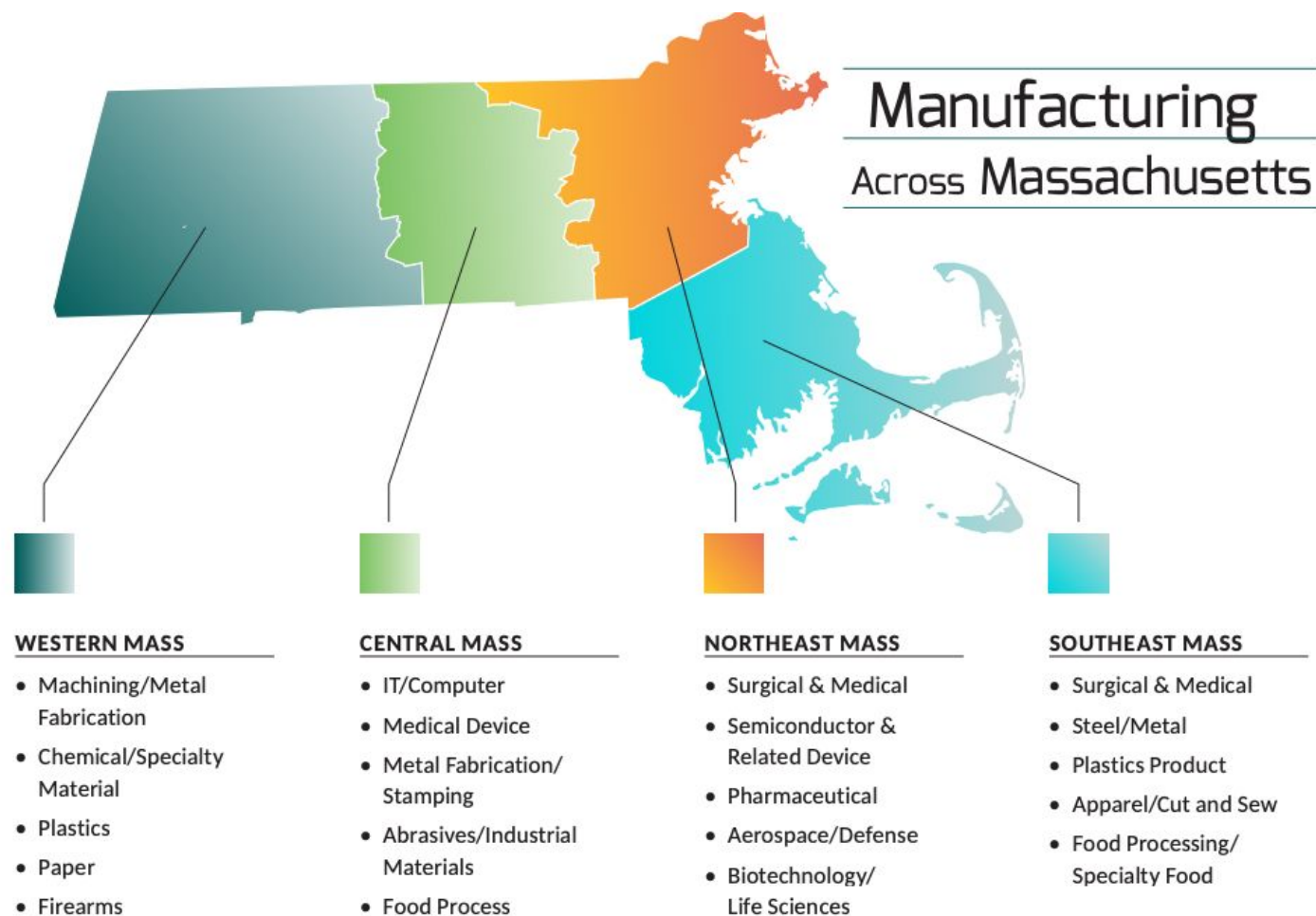
Specialty food • beverage • CPG



Plastics, Metal & Tooling

Injection molding • fabrication • machining

Every region anchors a distinct mix.



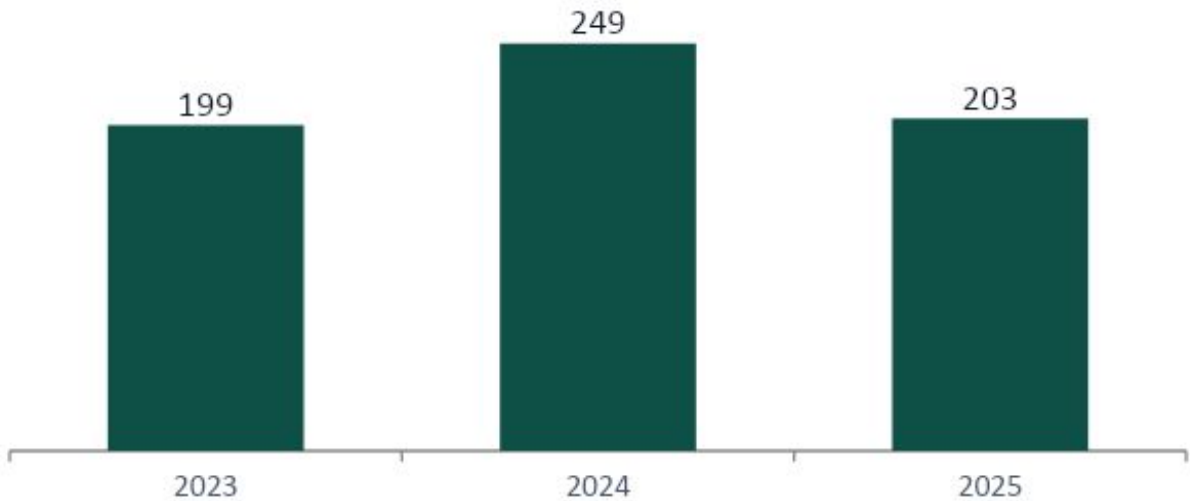
Three years of listening to Massachusetts manufacturers.

651

manufacturer responses across three years.

*All nine congressional districts represented. Same core questions.
Real trends, not just snapshots.*

Responses by year



*“The data is more than a snapshot. **It's a roadmap.**”*

— Kathie Mahoney, MassMEP President

Partnership that shows up in the numbers.

Direct impact of MassMEP client work, March 2020 – March 2025.

14,938

Jobs created & retained

\$1.8B

Increased & retained sales

\$374M

New investments

\$66M

Cost savings for manufacturers

And when you add the ripple effect across the MA economy:

42,764

total jobs created & retained

\$13B

economic output

\$6B

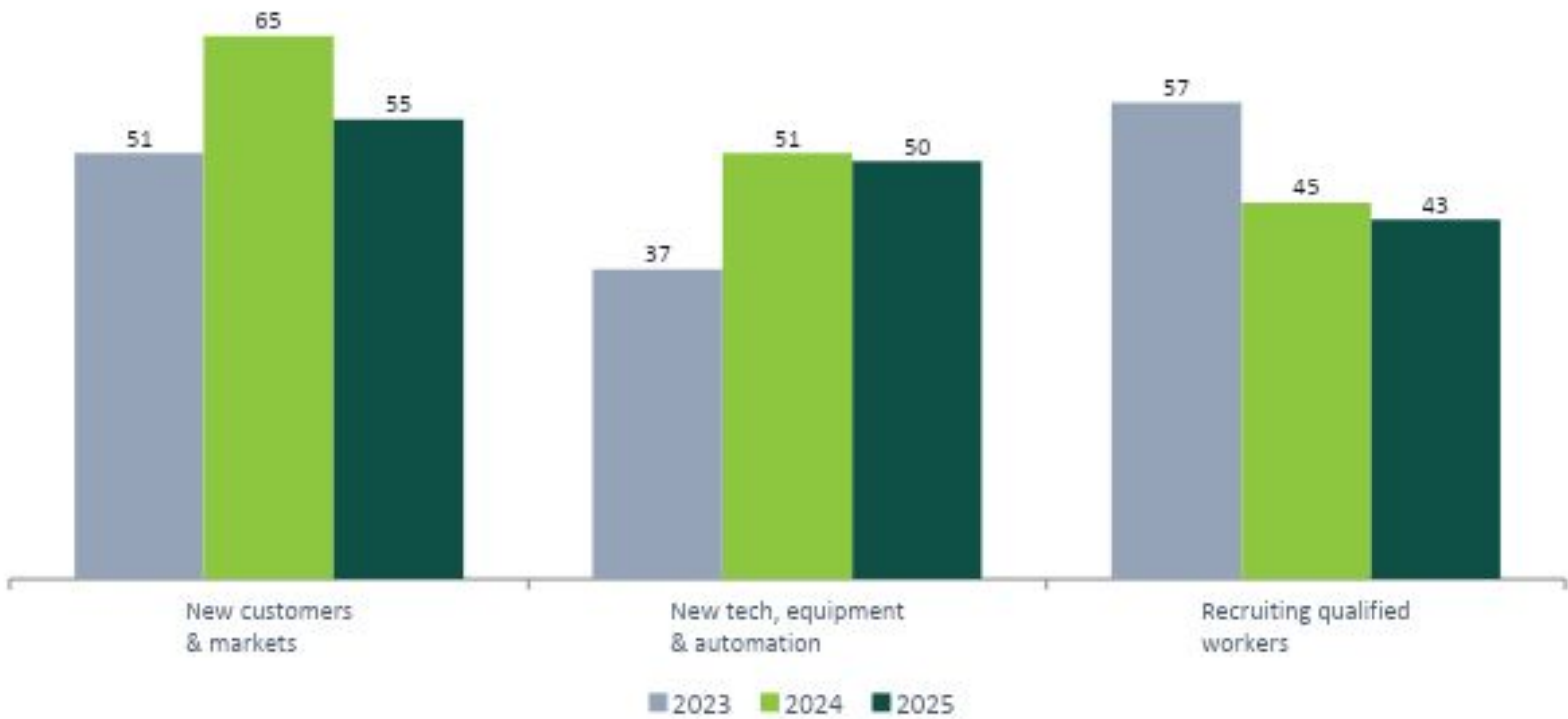
GSP (value added)

\$1B

tax revenues generated

What used to be #3 is now tied for #1.

% of respondents picking each as a top-3 priority



THE STORY

Recruiting peaked in 2023 (57%) when the labor market was tightest. **It has cooled to 43%** — still painful, but no longer the singular crisis.

Meanwhile, technology and automation have surged from 37% to 50%. Manufacturers are answering the labor question with capital, not just hiring.

AI is moving from experiment to production line.

AI tools are central to continuous improvement — and the impact is now measurable.



Predictive Maintenance

Detect failures before they happen — across machines, sensors, and lines.



Real-Time Quality Control

Vision and inference catch defects in milliseconds, not hours.



Dynamic Cost Estimation

Quote faster and more accurately — across volatile material markets.

25%

reduction in maintenance costs for AI-adopting manufacturers.

15–18%

gain in production output for AI adopters.

Train and automate. Don't just raise wages.

How manufacturers are responding to workforce challenges (% of respondents)



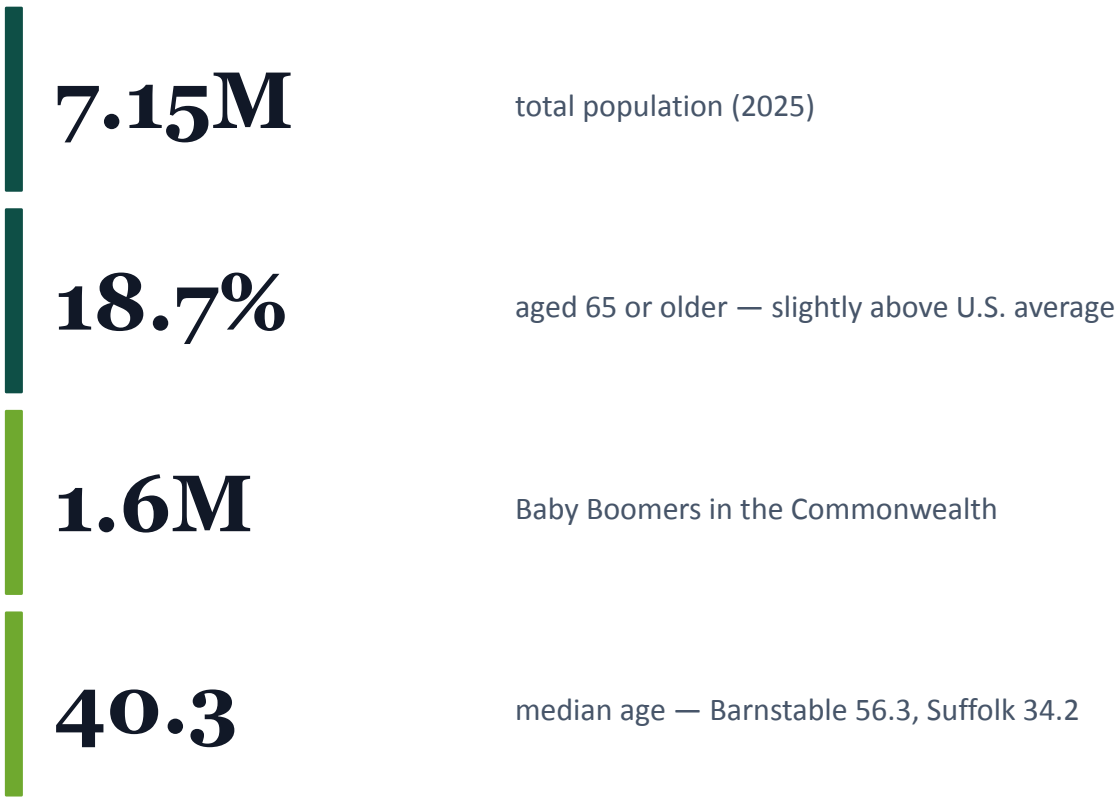
THE SHIFT

Training and automation are now the top two responses to the workforce squeeze.

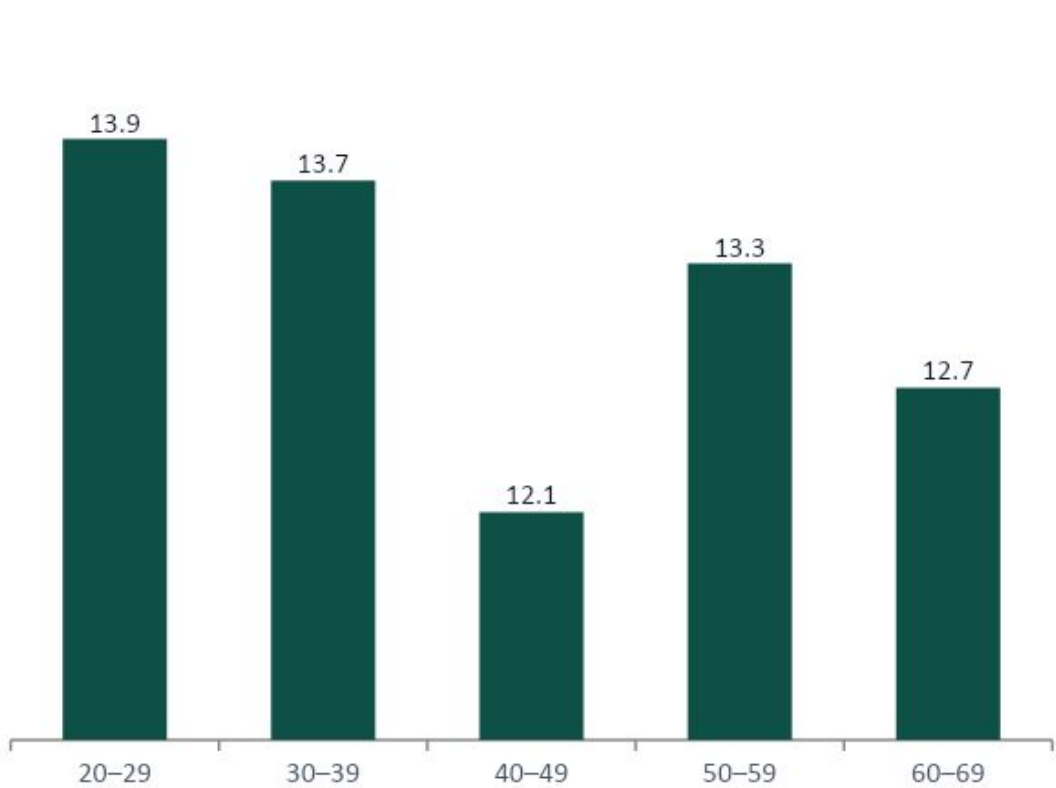
Wages, in contrast, peaked in 2023 and dropped 10 points. *Manufacturers are choosing leverage over leverage-on-payroll.*

An aging workforce is reshaping the talent pipeline.

Key demographic trends

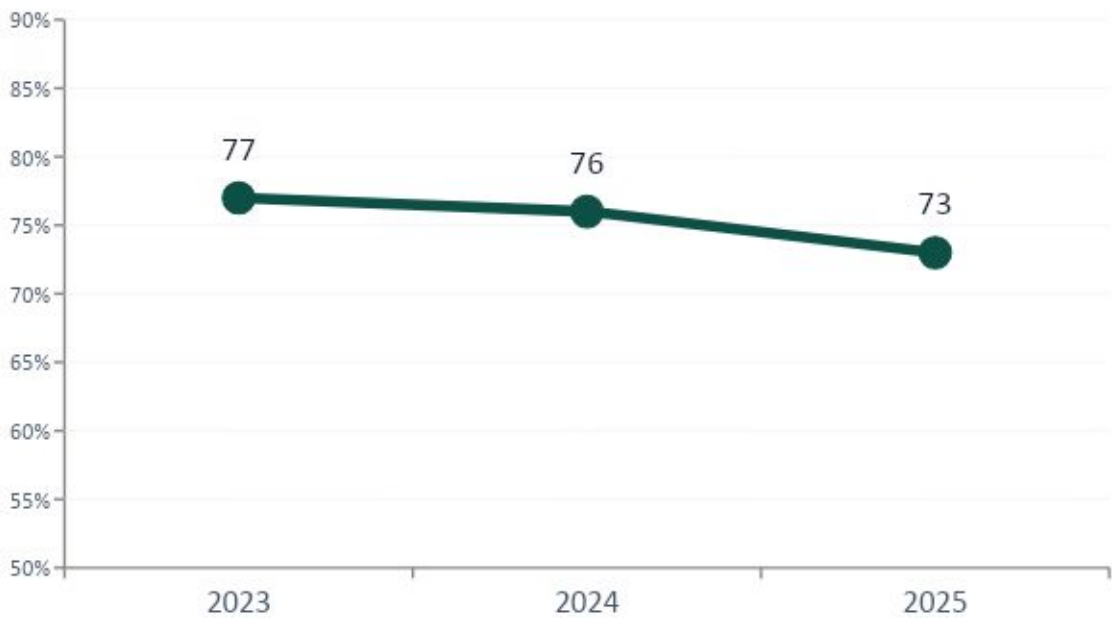


Population by age bracket



Investment intent has held for three straight years.

% of manufacturers planning capital investment



Capital is sticky. Even with tariff and policy headwinds, three out of four manufacturers say they will invest.

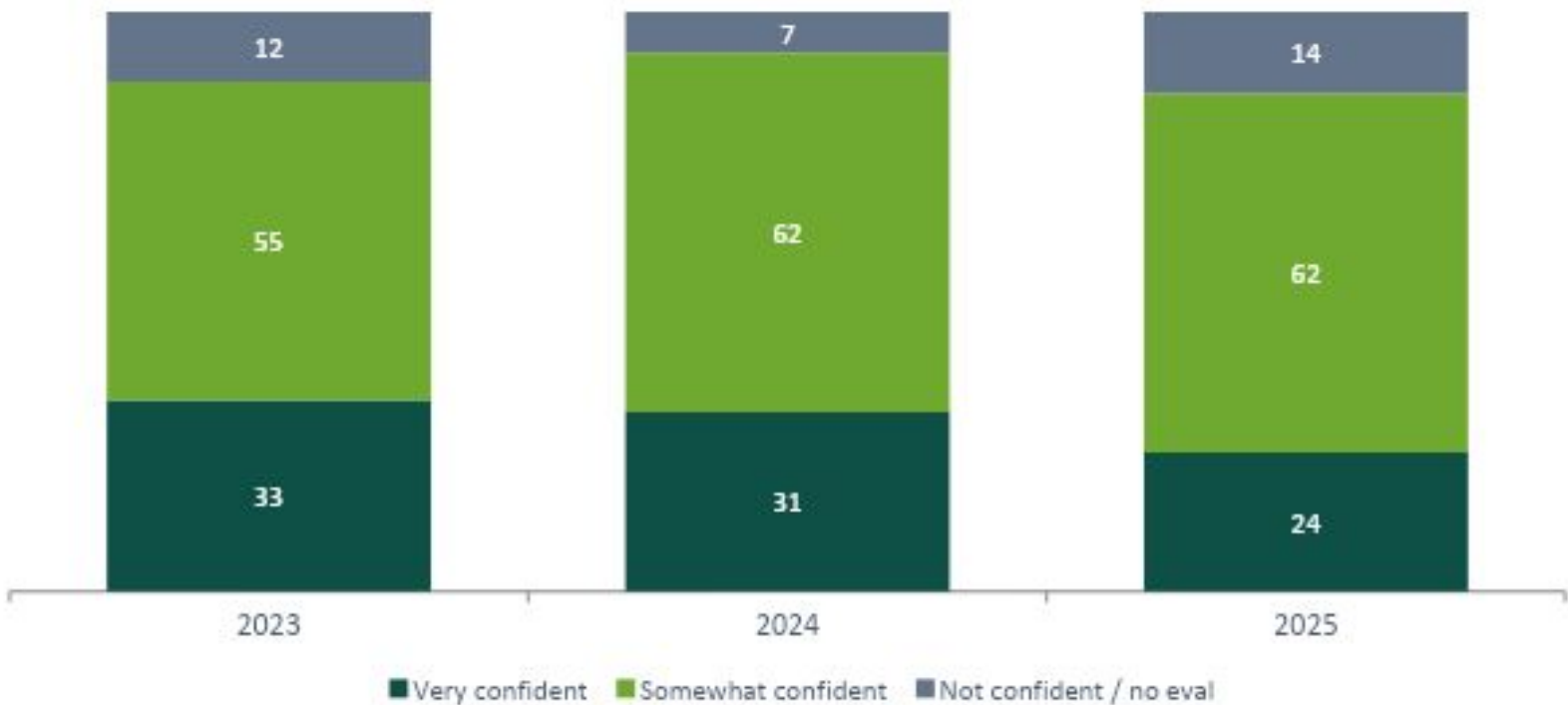
% planning to launch a new product or service



Innovation is steady. Six in ten manufacturers are bringing something new to market every year.

Manufacturers are losing confidence in their cyber defenses.

Cyber confidence — % of respondents



THE BOOKEND

88%

of MA business leaders believe AI will boost the state economy.

AI is the opportunity. Cyber is the unfinished work that has to keep pace with it.

Impact of cybersecurity on manufacturers

Cyber risk shows up in production, financials, IP, supply chain, reputation, and compliance — and it's also a place to differentiate.



Production Downtime

Attacks can stop machines, scheduling, inventory, or shipping operations.



Financial Losses

Ransom demands, recovery costs, lost sales, legal fees, insurance hikes.



Intellectual Property Theft

Designs, formulas, customer data, and proprietary processes are valuable targets.



Supply Chain Risk

A breach at one supplier can ripple to multiple companies downstream.



Reputation Damage

Customers expect reliability and data protection — security failures weaken trust.



Compliance Pressure

Defense, aerospace, healthcare, and gov't customers require NIST / CMMC standards.

BOOK END



At the same time...

**Cybersecurity can
be a competitive
advantage.**

*Manufacturers who can prove resilience win
contracts in defense, aerospace, healthcare, and
government supply chains.*

Reshoring is real — and tariffs are a brand-new top-five concern.

New growth limits — % naming as a top-3 limit on company growth

47%

of manufacturers have shifted to source more domestically (2025).

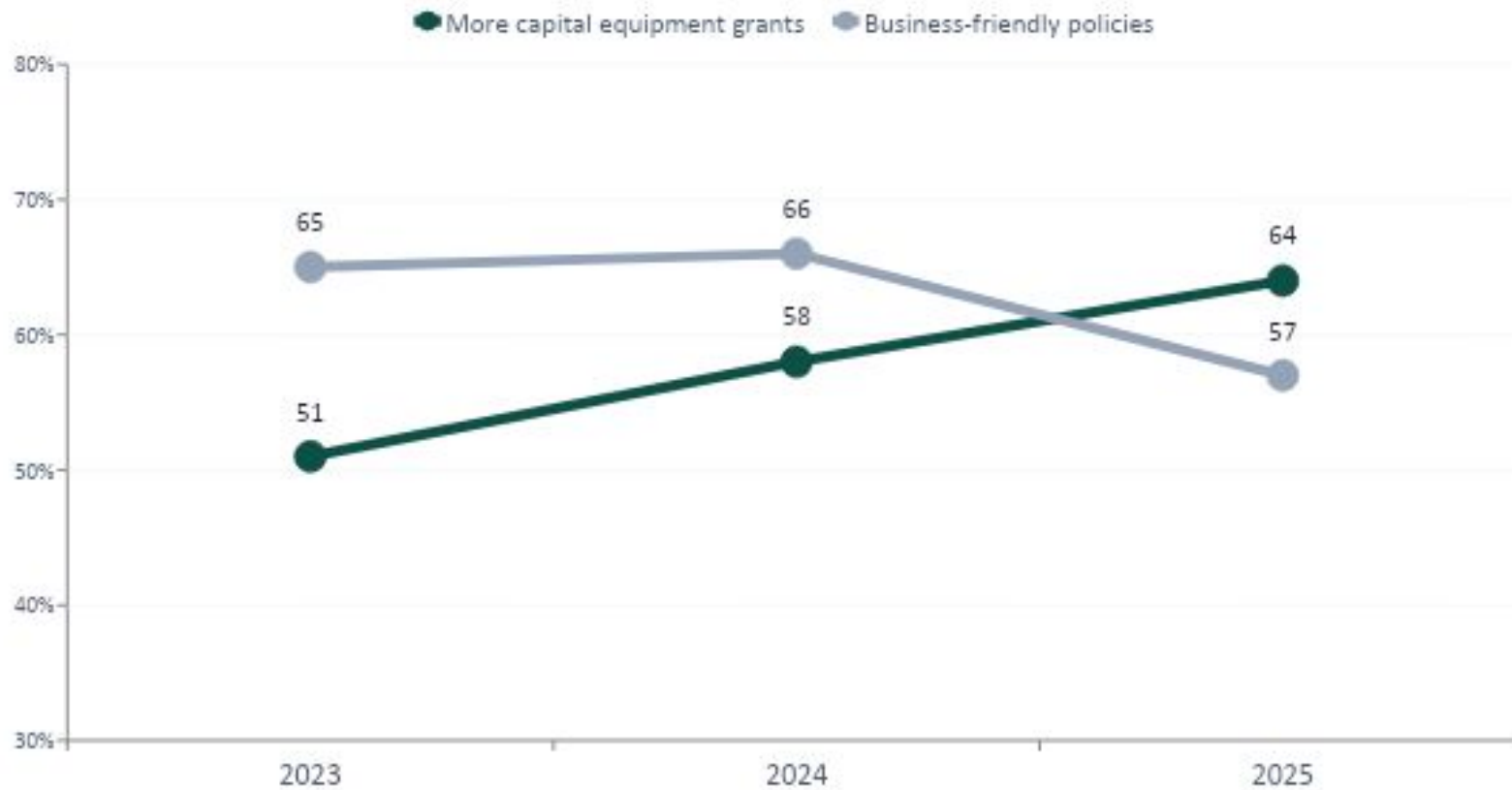
Top barriers to reshoring

- 1 Limited domestic suppliers
- 2 Higher domestic production costs
- 3 Tariffs & trade policy uncertainty



For the first time, capital equipment grants are the top ask.

Top policy priorities for MA lawmakers — % of respondents



THE FLIP

Capital equipment grants are now the #1 policy ask.

Manufacturers want to invest. They are asking the Commonwealth to be a co-investor on capital — not just a friendlier landlord.

Capital is on the table — and Massachusetts helps you reach it.

MMAP

Massachusetts Manufacturing Accelerate Program

Capital equipment grants supporting Massachusetts manufacturers' ability to upgrade, expand, and modernize.

M2I2

Massachusetts Manufacturing Innovation Initiative

State match funding for Manufacturing USA institutes and advanced-manufacturing R&D investments across the Commonwealth.

MassMEP is a partner on both programs.

We help you scope the project, prepare the application, and execute on the award.

Six trends. One Commonwealth.



Recruiting cools, but doesn't disappear

Top priority of 57% in 2023 → 43% in 2025. The labor crunch is easing, not gone.



Train and automate, don't just pay more

Training and automation now lead wages by 13–15 points as workforce strategies.



Investment intent has held

~75% plan capital investment every year. ~60% launch new products every year.



Cyber confidence is slipping

“Very confident” fell from 33% in 2023 to 24% in 2025 — even as AI adoption rises.



Tariffs & uncertainty are new pressures

Tariffs jumped from 0 to 30% as a top growth limit. Regulatory uncertainty: 14% → 38%.



Capital grants now lead the policy ask

“More capital equipment grants” overtook “business-friendly policies” for the first time.

We don't go it alone — and neither do you.

Massachusetts has a wide variety of organizations that support manufacturing. These are a few of the many partners MassMEP works with to deliver services and resources statewide.

MassDevelopment	MassTech Collaborative	MEMA (Mfrs Assn.)
MA APEX Accelerator	MassHire Workforce Boards	Greater Boston Mfg. Partnership
Worcester Polytechnic Institute	UMass Lowell	Cape Cod Community College
FORGE	MA Office of Business Development	Manufacturing USA Institutes

What this looks like inside a plant.

CASE STUDY

Cartamundi | East Longmeadow, MA

A global leader in card and game manufacturing partnered with MassMEP on Lean Six Sigma training to attack inefficiency on a high-volume line.

\$330K

annual savings from workflow optimization

\$230K

cost savings realized in 2024

200K lb

annual reduction in scrap material

3

Green Belts trained & certified

“MassMEP’s training programs equip our employees with the essential skills needed in today’s manufacturing landscape.”

— Peter Letendre, Director of Operations, Cartamundi | 2025 Jack Healy Awardee

THANK YOU

**Massachusetts manufacturing is not just
enduring.
It's evolving — with purpose.**

Congratulations to every honoree in this room tonight — and to every manufacturer keeping our Commonwealth moving forward.

Kathie Mahoney | President, MassMEP | massmep.org

Celebrating 30 Years of Manufacturing Excellence • 1995 – 2025