ADVANCECT CONNECTICUT

CONNECTICUT

Advanced Manufacturing

SECTOR SNAPSHOT



LEARN MORE ABOUT CONNECTICUT'S KEY INDUSTRIES AT **ADVANCECT.ORG**

Advanced Manufacturing Sector Snapshot

LET'S TALK ABOUT LAUNCHING YOUR BUSINESS IN CONNECTICUT



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All data current as of September 2026.

ABOUT ADVANCECT

OUR PURPOSE

AdvanceCT helps businesses choose, invest in, and grow in Connecticut. We do this by helping businesses solve challenges through the right people, resources, expertise, and relationships.

LEARN MORE AT **ADVANCECT.ORG**

WHAT WE DO

Our role is to connect businesses with the right partners, align stakeholders around common goals, and help projects move forward. Our success depends on strong partnerships across state government, regional organizations, municipalities, higher education, utilities, industry associations, and the private sector.

ADVANCECT RESEARCH TEAM



Jessica Jackson
Vice President, Research



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Ben Iannuzzi
Business Associate

Our Research team is a unique resource for Connecticut businesses focused on making smarter business decisions. Our reports, including our annual sector snapshots, *De-Risking the Business Location Decision* and *Metrics that Mislead*, provide insights that help business leaders evaluate risk, challenge conventional assumptions, and make more informed decisions.

Value Proposition



Advanced Manufacturing in Connecticut

Connecticut builds some of the most technologically advanced products in the world. Behind every one of them is a legacy of craft, a workforce built to last, and an ecosystem that turns ideas into reality.

TRUSTED FOR GENERATIONS

From the first helicopter to take flight to the submarines that defend our nation today, the world's most demanding manufacturers have called Connecticut home for generations, and they still do.

PRECISION AT THE EXTREME

Connecticut manufacturers build to tolerances finer than a human hair, turning the most demanding designs into working reality.

QUALITY IS THE CULTURE

Generations of quality and productivity have made Connecticut's workforce one companies can build and scale a business around.

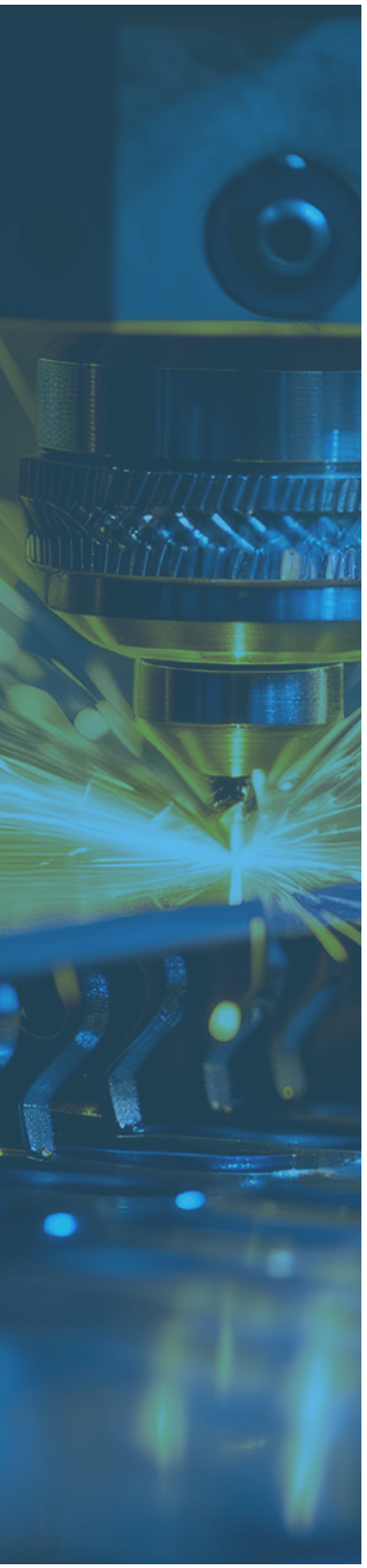
IDEAS BECOME REALITY

World-class universities and research labs partner directly with the manufacturers who turn breakthroughs into products.

Industry Overview

ADVANCED MANUFACTURING SECTOR SNAPSHOT

ADVANCE CT
CONNECTICUT



Overview

Connecticut is known for advanced technologies for extreme precision, multiple generations of skill and know-how, and a workforce dedicated to quality and productivity.

1,100
Advanced manufacturing establishments

4,000
Manufacturing establishments

74,200
Advanced manufacturing jobs
#1 MOST PER CAPITA IN THE U.S.

153,000
Manufacturing jobs

$21 Billion
Advanced manufacturing yearly gross state product
#2 HIGHEST PER CAPITA IN THE U.S.

$39 Billion
Manufacturing yearly gross state product

SOURCE: LIGHTCAST, 2025–Q3 2026 RELEASE

The Future of Technical Innovation

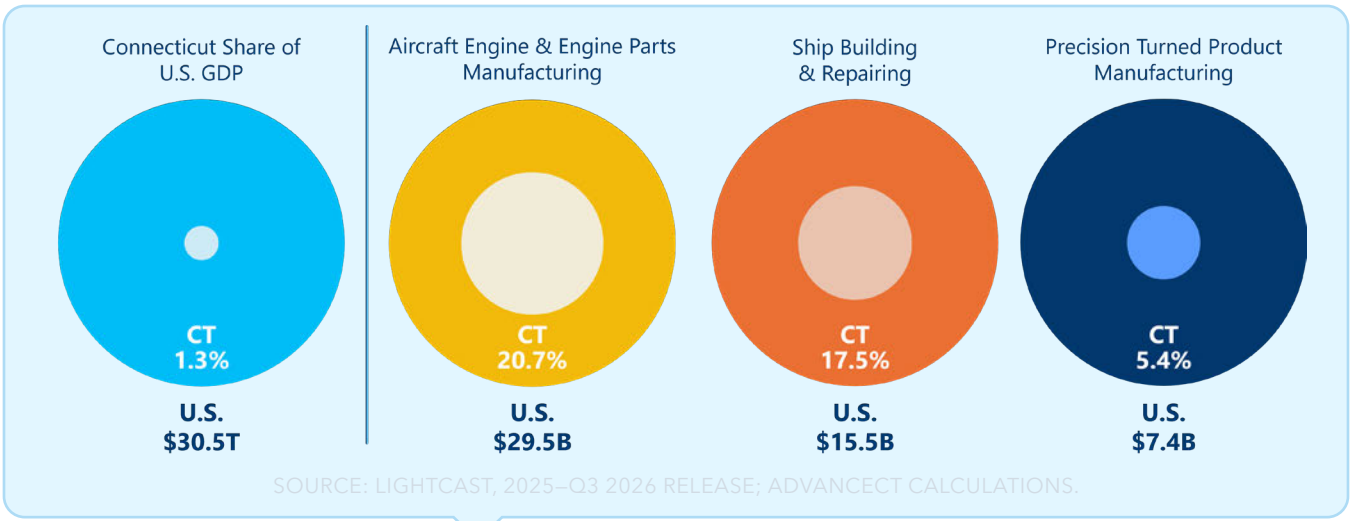


Connecticut is a manufacturing powerhouse, producing some of the most advanced technology in the world and supported by thousands of companies in the supply chain.

Company	Industry	Revenue ('25)	CT Jobs
ASML	Semiconductors	$36.8 billion[1]	3,200[12]
Pratt & Whitney	Aerospace & Defense	$32.9 billion[2]	10,800[13]
Collins Aerospace	Aerospace & Defense	$30.2 billion[3]	4,000[14]
Stanley Black & Decker	Tools & Accessories	$15.1 billion[4]	1,700[15]
Amphenol	Electronic Connectors	$23.1 billion[5]	*Not available*
OTIS Worldwide	Elevator Systems	$14.4 billion[6]	1,000[16]
Electric Boat	Shipbuilding	$12.6 billion[7]	16,100[17]
Sikorsky	Aerospace & Defense	$6.4 billion[8]	7,500[18]
TRUMPF	Machine Manufacturing	$5.0 billion[9]	500[19]
Arxis	Aerospace & Defense	$1.6 billion[10]	5,800[20]
Pursuit Aerospace	Aerospace & Defense	$678.9 million[11]	*Not available*

SOURCES: [1,3,4,5,6,9,10,11,20]PITCHBOOK, FY 2025. [2]RTX, SEC 10-K, FY 2025. [7]GENERAL DYNAMICS, SEC 10-K, FY 2025. REVENUE FOR NUCLEAR SUBMARINE PRODUCT; THE PORTION ATTRIBUTABLE TO ELECTRIC BOAT WAS NOT SPECIFIED. [8]LOCKHEED MARTIN FY 2025 FINANCIAL RESULTS, ESTIMATES BASED ON SIKORSKY SEGMENT REVENUES. [12]CT INSIDER, JUN 2025. [13,14]CT INSIDER, APR 2026. [15]CT INSIDER, JUL 2026. [16]CT INSIDER, JUL 2026.[17,18]STATE OF CONNECTICUT, ANNUAL COMPREHENSIVE FINANCIAL REPORT, 2025. [19]HARTFORD BUSINESS JOURNAL, MAY 2025.

Advanced Manufacturing National Contribution



SOURCE: LIGHTCAST, 2025–Q3 2026 RELEASE; ADVANCECT CALCULATIONS.

Connecticut represents an outsized portion of key U.S. advanced manufacturing production.

Connecticut's History of Innovation

Yale student David Bushnell invented the prototype of all **modern submarines** in 1775. Named the Turtle, the submarine's first torpedo attack upon an enemy warship was in September 1776.[1]

GENERAL DYNAMICS
Electric Boat

Electric Boat makes **the world's most advanced nuclear submarine** in Groton and earned the largest ship-building contract in Navy history of $76.6 billion in 2026.[2]

Danbury company Unimation invented the **first industrial robot**, the Unimate, in 1962. Patent-owner George Devol and the "father of robotics" Joseph Engelberger developed the robot that would be **used by large car makers across the globe**.[3,4]

CONNECTICUT CENTER FOR ADVANCED TECHNOLOGY

The Connecticut Center for Advanced Technology (CCAT) supports the next generation of **robotics** by partnering with companies to develop, test, and integrate robotic systems across industries statewide.[5]

Wilton was home to the **first optical lithography machine** invented by PerkinElmer in 1972. The **Micralign** used mirrors instead of lenses to create the Offner relay system that would drastically increase the number of working chips on a wafer.[6]

ASML

Today, Wilton is home to **ASML's** only in-house **optical fabrication facility**, which builds critical optics for the company's EUV machines that are used to mass-produce **the world's most advanced microchips**.[7]

SOURCE: [1]U.S. NAVAL INSTITUTE, ACCESSED AUG 2026. [2]CBIA, JUL 2026. [3]KAWASAKI ROBOTICS, ACCESSED AUG 2026. [4]ASSOCIATION FOR ADVANCING AUTOMATION ROBOTICS, ACCESSED AUG 2026. [5]CONNECTICUT CENTER FOR ADVANCED TECHNOLOGY, INC., ACCESSED AUG 2026. [6,7]ASML, ACCESSED AUG 2026.

Talent

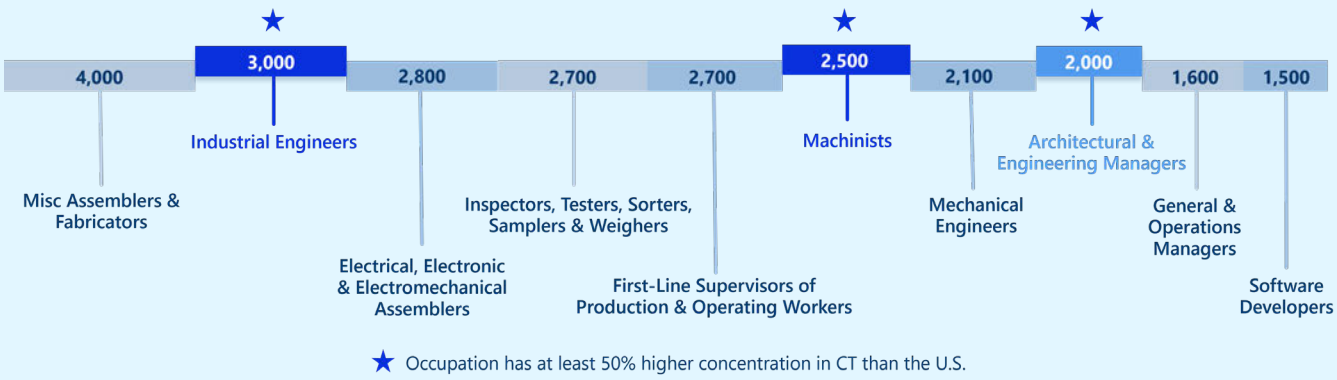
ADVANCED MANUFACTURING SECTOR SNAPSHOT

ADVANCE CT
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Connecticut's advanced manufacturing ecosystem runs on specialized talent, giving companies the skilled workforce they need to innovate and stay competitive. That talent pipeline starts with the state's top research universities, which supply the ideas and expertise that carry businesses into their next generation of growth. It's no accident that leading OEMs and supply chain companies choose Connecticut to develop their mission-critical products: the state's depth of skill keeps them ahead.

Specialized, High-Output Workforce

Top 10 Advanced Manufacturing Jobs



Connecticut's $277,000 output per advanced manufacturing worker is the #5 highest of any state.

HIGH CONCENTRATIONS OF KEY OCCUPATIONS

- Connecticut has **38% more engineers** than the national average.
- Connecticut has **1.5x** the national average for computer numerically controlled tool **operators and programmers**.
- Connecticut has **1.7x** the national average for **machinists** and **2.9x** for **tool and die makers**.

Exceptional Location for Manufacturing Talent

Connecticut is a top state for specialized manufacturing talent*:

#3 TOOL AND DIE MAKERS

#3 MARINE ENGINEERS AND NAVAL ARCHITECTS

#5 MACHINISTS

#7 MECHANICAL ENGINEERS

State rank by employment concentration.

SOURCE: LIGHTCAST, 2025–Q3 2026 RELEASE; ADVANCECT CALCULATIONS. *EXCEPT COIL WINDERS, TAPERS, AND FINISHERS. JOBS ROUNDED TO NEAREST HUNDRED.

Engineering Talent Pipeline

Graduates From Key Engineering Programs, 2021-2025

School	Mechanical Engineering	Electrical and Electronics Engineering	Industrial Engineering
UCONN UNIVERSITY OF CONNECTICUT	1,060	481	206
University of New Haven	242	178	153
UNIVERSITY OF HARTFORD	202	114	N/A
CENTRAL CONNECTICUT STATE UNIVERSITY	232	N/A	N/A
Yale	238	190	N/A
Fairfield UNIVERSITY	175	43	32

SOURCE: LIGHTCAST, 2025–Q3 2026 RELEASE.

Connecticut's robust engineering pipeline provides ample opportunity to hire new talent.

3,500+ total reported engineering graduates

21%
of Pratt & Whitney's U.S.-based engineers are UConn alumni (2,200+ people)[1]

67% of UConn engineering graduates accepted full-time jobs in Connecticut[1]

900+
University of Hartford engineering, technology and architecture alumni work in Connecticut[2]

SOURCE: [1]UCONN TODAY, SEP 2025. [2]UNIVERSITY OF HARTFORD, COLLEGE OF ENGINEERING, TECHNOLOGY, AND ARCHITECTURE ALUMNI PAGE, ACCESSED SEP 2026.

Research & Development

Deep Bench of Research and Development Talent

Companies locate their R&D facilities in Connecticut to access essential scientific and engineering skill and in-depth industry expertise.

#7
in the U.S. for **patent creation rate**[1]

#5
in the U.S. for private R&D investment per capita, **34% higher** than the national average[2]

A Top State for Engineering and Science Talent[3]

Occupation	Concentration *(compared to national average)*
Nuclear Engineers	680% more
Marine Engineers and Naval Architects	671% more
Materials Engineers	73% more
Chemical Engineers	72% more
Aerospace Engineers	53% more
Industrial Engineers	51% more
Mechanical Engineers	42% more
Electrical Engineers	35% more
Electronics Engineers, Except Computer	6% more

SOURCE: [1]U.S. NEWS & WORLD REPORT, 2026. [2]NATIONAL SCIENCE FOUNDATION, 2023–RELEASED SEP 2025; U.S. CENSUS BUREAU, 2023; ADVANCECT CALCULATIONS. [3]LIGHTCAST, 2025–Q3 2026 RELEASE; ADVANCECT CALCULATIONS.

Selected Research and Development Facilities

Revolutionary R&D continues to drive global innovation across industry sectors.

MTU Aero Engines

R&D FACILITY

Rocky Hill, Connecticut

TALENT

250+ engineers[1]

CAPABILITIES

Expertise in engine design and R&D in both commercial and military aviation, as well as third-party engineering services for aerospace and industrial gas turbine customers[2]

RTX

TECHNOLOGY RESEARCH CENTER MAIN CAMPUS

East Hartford, Connecticut

TALENT

85% of staff hold advanced degrees; over 200 patents are secured per year on average[3]

CAPABILITIES

Innovation hub focusing on complex, integrated systems; advanced materials; model-based digital thread; AI; electrification & sustainability; and disruptive technologies[4]

ARBURG

U.S. HQ

Rocky Hill, Connecticut

TALENT

Award-winning apprenticeship program[5]

CAPABILITIES

ARBURG Technology Factory equips injection molding machines to customer specifications and develops bespoke turnkey systems[6]

Henkel

MULTIPLE R&D LOCATIONS IN CONNECTICUT

Rocky Hill, Stamford, and Trumbull, Connecticut

TALENT

Henkel employs a variety of scientific talent[7]

CAPABILITIES

OEM Application Center supports industrial assembly customers with rapid design and process evaluation, plus virtual demonstrations of advanced automation technology.[8]

SOURCE: [1]MTU PRESS RELEASE, ACCESSED AUG 2026. [2]MTU AEROENGINES, ACCESSED AUG 2026. [3,4]RTX FACT SHEET, ACCESSED JUL 2026. [5,6]ARBURG, ACCESSED AUG 2026. [7]LIGHTCAST, PROFESSIONAL PROFILES SHOW LAB TECHS, SOFTWARE DEVELOPERS, ETC., ACCESSED AUG 2026. [8]HENKEL, ACCESSED SEP 2026.



Research & Talent Pipeline

ADVANCED MANUFACTURING SECTOR SNAPSHOT

ADVANCECT CONNECTICUT

Connecticut's universities and employers turn research into products and processes while developing the next generation of manufacturing talent. Home to Yale and UConn, the state is a leader in quantum, AI, and engineering research. Organizations across Connecticut have built workforce development centers and programs that prepare people for manufacturing careers. Companies that build here are surrounded by the ideas, expertise, and skilled workers needed to grow.

Universities



Yale: Science, Engineering, and Research

> Yale must lead the **future of science and engineering**. We must continue to **drive innovation** and **train future leaders** in the burgeoning quantum revolution. And we must use our expertise and convening power to help create a robust quantum tech ecosystem for New Haven and Connecticut.[1]
>
> – Provost Scott Strobel

HISTORIC INVESTMENTS IN SCIENCE AND ENGINEERING

- Upper Science Hill: one of the largest capital commitments in university history, built to consolidate labs for nearly 50 faculty in physics, applied physics, and quantum research, positioning Yale as a magnet for science and engineering talent[2]
- Over $150 million in artificial intelligence initiatives: five-year commitment (2024–2029) to expand research infrastructure and add 20 new faculty for the School of Engineering & Applied Science[3]

AWARDS AND RECOGNITION

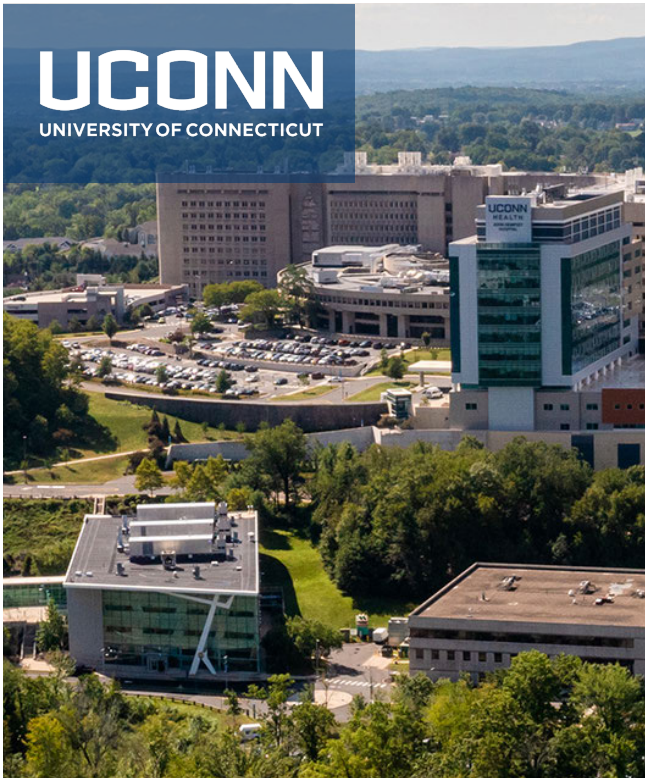
- 2025 Nobel Prize in Physics: awarded to Michel Devoret, Yale Professor Emeritus of Applied Physics, for foundational quantum computing research[4]
- Five Yale Engineering faculty won NSF CAREER Awards in 2026: one of the largest cohorts in the school's history, spanning trustworthy AI, on-chip photonics, cryptography, and self-organizing tissue engineering[5]

In FY 2026, Yale's entrepreneurial activity included:[6]

11 faculty-led spinouts
331 invention disclosures
73 new license deals
225 patents issued

SOURCES: [1]YALENEWS, OCT 2024. [2]YALE UNIVERSITY, CAPITAL PROJECTS. "UPPER SCIENCE HILL DEVELOPMENT." ACCESSED AUG 2026. [3]YALENEWS, AUG 2024. [4]YALENEWS, OCT 2025. [5]YALENEWS, JUL 2026. [6]YALE VENTURES 2026 ANNUAL REPORT, ACCESSED AUG 2026.

Universities



University of Connecticut

STEM AND RESEARCH & DEVELOPMENT

- UConn is the **largest producer** of STEM graduates in Connecticut
- UConn is a Carnegie Foundation R1 research university, a distinction held by only 4.8% of U.S. institutions of higher education[1]
- UConn's Technology Incubation Program (TIP) has helped facilitate over $1.4B[2] in funding for cutting-edge startups since 2003

SOURCE: [1]CARNEGIE CLASSIFICATION OF INSTITUTIONS OF HIGHER EDUCATION, ACCESSED AUG 2026. [2]UCONN TIP, ACCESSED AUG 2026.

Educational Partnerships for Specialized Engineering Talent

CASE STUDY

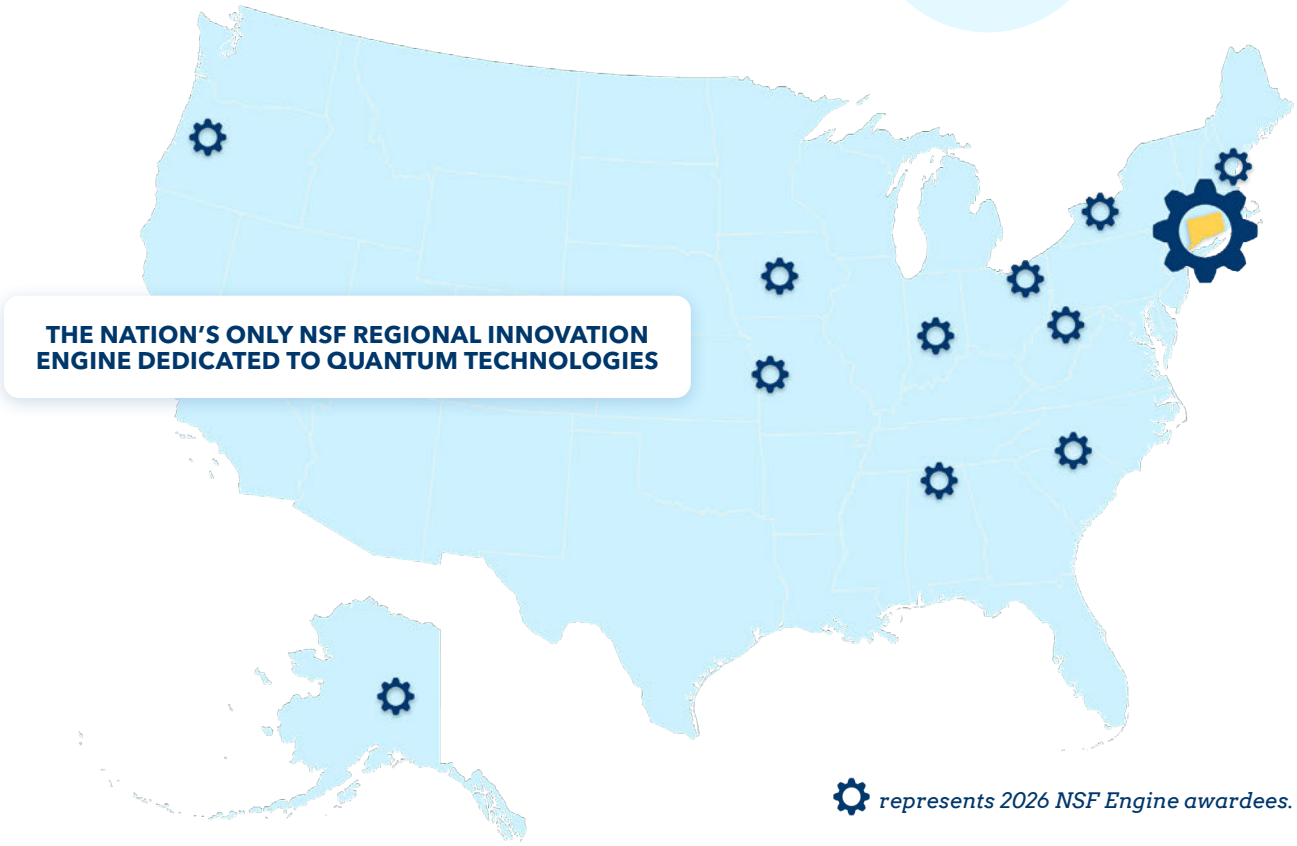
Decades of investment in UConn's College of Engineering have built a direct pipeline from classroom to career, spanning four dedicated research centers plus targeted student programs.[1]

- Pratt & Whitney Institute for Advanced Systems Engineering: certificate and Master of Engineering programs training working engineers in systems engineering[2]
- Pratt & Whitney Scholars Program: $10,000 annual scholarship for underrepresented students in mechanical, electrical, and materials engineering[3]
- Center of Excellence, Additive Manufacturing Center, and Collins Aerospace Center: additional centers advancing research in combustion, materials, and advanced processing[4]

SOURCE: [1,4]UCONN TODAY, JAN 2026. [2]UCONN CENTER FOR ADVANCED ENGINEERING EDUCATION, ACCESSED AUG 2026. [3]PRATT & WHITNEY SCHOLARSHIP, VERGNANO INSTITUTE FOR IMPACT, ACCESSED AUG 2026.

Quantum: NSF Engine Award[1]

Led by UConn and Yale, anchoring a quantum incubator in New Haven.



represents 2026 NSF Engine awardees.

> Connecticut is the nation's **leading state** for quantum technology adoption.[2]
>
> – Pamir Alpay
> *Provost and EVP for Academic Affairs at UConn*

JULY 2026 **$15M** Two-year NSF Regional Innovation Engines award

$160M Potential federal total over 10 years

$121M Pledged by the State of Connecticut

SOURCE: [1]U.S. NATIONAL SCIENCE FOUNDATION, JUL 2026; QUANTUMCT; STATE OF CONNECTICUT. FEDERAL TOTAL OF $160M IS CONTINGENT ON MEETING NSF PERFORMANCE MILESTONES. [2]UCONN TODAY, JUL 2026.

Employer-Centered Training

Low- to no-cost programs target beginner talent through semi-skilled talent and can range from short-term programs to a four-year degree. Some programs can be completed in as little as 5 weeks.

Goodwin University

CSCU CONNECTICUT STATE COLLEGES & UNIVERSITIES

MPI Eastern CT Manufacturing Pipeline Initiative

CTECS CONNECTICUT TECHNICAL EDUCATION AND CAREER SYSTEM

Workforce Alliance

NORTHWEST REGIONAL WORKFORCE INVESTMENT BOARD

ReadyCT EDUCATION – THE ENGINE OF OPPORTUNITY

Specialties include:

- Computer Numerical Control Machinist
- Industrial Service Technician
- Robotics and Automation
- Design and Engineering
- Plastics Injection Molding
- Manufacturing Technology
- Logistics
- Welding and Metal Fabrication
- Manufacturing Management

SOURCE: [1]GOODWIN UNIVERSITY, ACCESSED AUG 2026. [2]WORKFORCE ALLIANCE, ACCESSED AUG 2026. [3]EASTERN CT WORKFORCE INVESTMENT BOARD, ACCESSED AUG 2026. [4]NORTHWEST REGIONAL WORKFORCE INVESTMENT BOARD, ACCESSED AUG 2026. [5]CONNECTICUT TECHNICAL EDUCATION AND CAREER SYSTEM, ACCESSED AUG 2026. [6]CT STATE COMMUNITY COLLEGE, ACCESSED AUG 2026.

Logistics & Supply Chain

ADVANCED MANUFACTURING SECTOR SNAPSHOT

ADVANCECT CONNECTICUT

Connecticut's position on the Eastern Seaboard places it at the center of North American commerce, with easy access to major metros including New York, Boston, Montreal, and Toronto. That location, paired with the state's infrastructure, allows companies to move products to customers quickly and efficiently.

Connecticut supports some of the most advanced supply chains in the world, from semiconductors to fighter jets, whether products move by air, sea, rail, or road. Its manufacturers rarely have to look far for the suppliers they need. The right partner is often already in Connecticut.

Multi-Modal Logistics



By Water

3 deepwater ports: Bridgeport, New London, and New Haven, the 3rd largest port in New England.[1]

By Road

I-95 and I-91 connect Canada to Florida, and I-84 connects CT to Massachusetts and New York.

By Rail

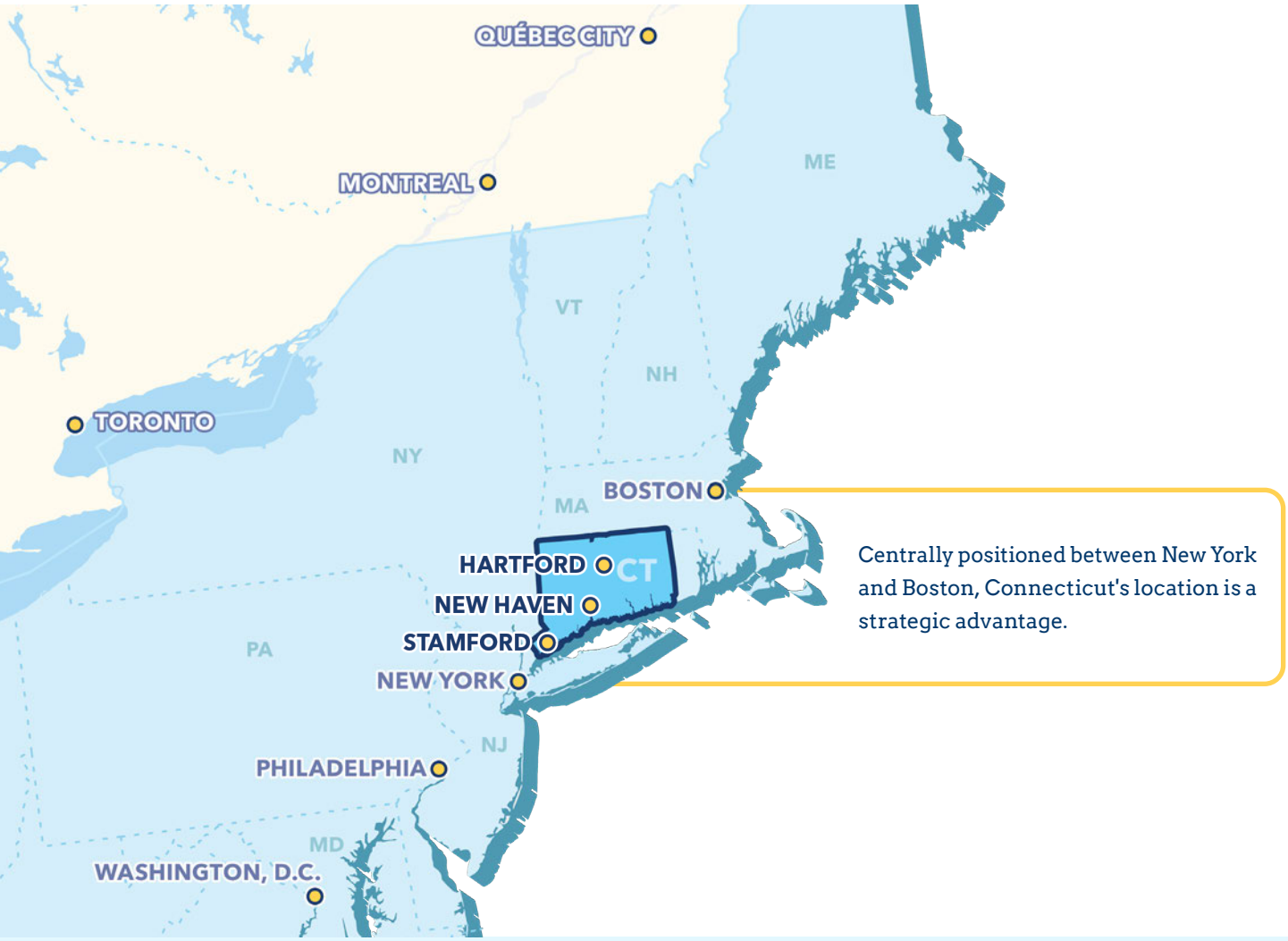
Freight is handled by multiple carriers serving interstate and intrastate transportation.

By Air

Bradley International Airport has 3.3+ million sq ft dedicated to cargo operations and 350 million pounds of cargo annually.[2]

SOURCE: [1]U.S. DEPARTMENT OF COMMERCE, 2025; ADVANCECT CALCULATIONS. IMPORTS PLUS EXPORTS BY WEIGHT. [2]CONNECTICUT AIRPORT AUTHORITY, 2025.

Unbeatable Location



Centrally positioned between New York and Boston, Connecticut's location is a strategic advantage.

Within 500 miles of Connecticut:[2]

- Over 29% of the U.S. population, 29% of U.S. business establishments, 30% of U.S. jobs, and 31% of U.S. GDP[1]
- 65% of Canada's population, 62% of Canada's businesses, and 66% of Canada's employment[2]

SOURCE: [1]U.S. BUREAU OF ECONOMIC ANALYSIS, 2024-2025; U.S. BUREAU OF LABOR STATISTICS, 2024; ADVANCECT CALCULATIONS. [2]STATISTICS CANADA, 2024-2025; ADVANCECT CALCULATIONS.

An Elite Supply Chain

Home to a dense network of OEMs, Tier 1 suppliers, and precision manufacturers, Connecticut enables seamless integration across the aerospace and advanced manufacturing value chain, accelerating innovation, production, and delivery.

ASML

> ASML is the world's largest supplier of photolithography machines for semiconductors with a ~90% market share.
>
> **MORNINGSTAR, JULY 2026**

AIRBUS

> A small state with a massive presence in the aviation industry. Every Airbus aircraft has significant U.S.-made content, and Connecticut is THE number one supplier state to Airbus.
>
> – Robin Hayes, Chairman & CEO, North America, Airbus

> It [Connecticut's aerospace and industrial complex] is a national asset, what we have here. It would take generations to replicate, if it could even be replicated.
>
> – Shane Eddy, President, Pratt & Whitney

mott

> After searching the world for companies that can meet our precision and reliability needs, we often find that the best partners are our neighbors right here in Connecticut.
>
> – Boris Levin, Former CEO, Mott Corporation

Subsectors

ADVANCED MANUFACTURING SECTOR SNAPSHOT

ADVANCECT CONNECTICUT

Subsectors Overview

Aerospace & Defense

Semiconductor Equipment Manufacturing

Making What Few Others Can

World-leading technologies made in Connecticut: submarines, jet engines, industrial lasers, and the machines that print the most advanced chips, to name a few.

Quantum Circuits, Inc

Quantum Circuits invented the first Dual-Rail Qubit with built-in error detection.[1] This dual-rail technology now supports NVIDIA's CUDA-Q programming language, helping developers combine quantum computing with AI and machine learning workloads.[2]

TRUMPF

TRUMPF produces all its sheet-metal laser-cutting machines and connected automation systems for the North American market in Farmington. Its new $40 million Smart Factory uses automated, data-driven production.[3]

ASML

More than 3,000 employees at ASML's largest U.S. site in Wilton build critical optics and components. ASML is the only company that makes the EUV machines that enable the production of the world's most advanced chips.[4]

GKN AEROSPACE

GKN Aerospace is expanding its Newington facility with a new additive manufacturing line for aircraft engine components used in Pratt & Whitney's GTF engines. The project brings Swedish-developed technology to Connecticut and strengthens the state's aerospace supply chain.[5]

RTX

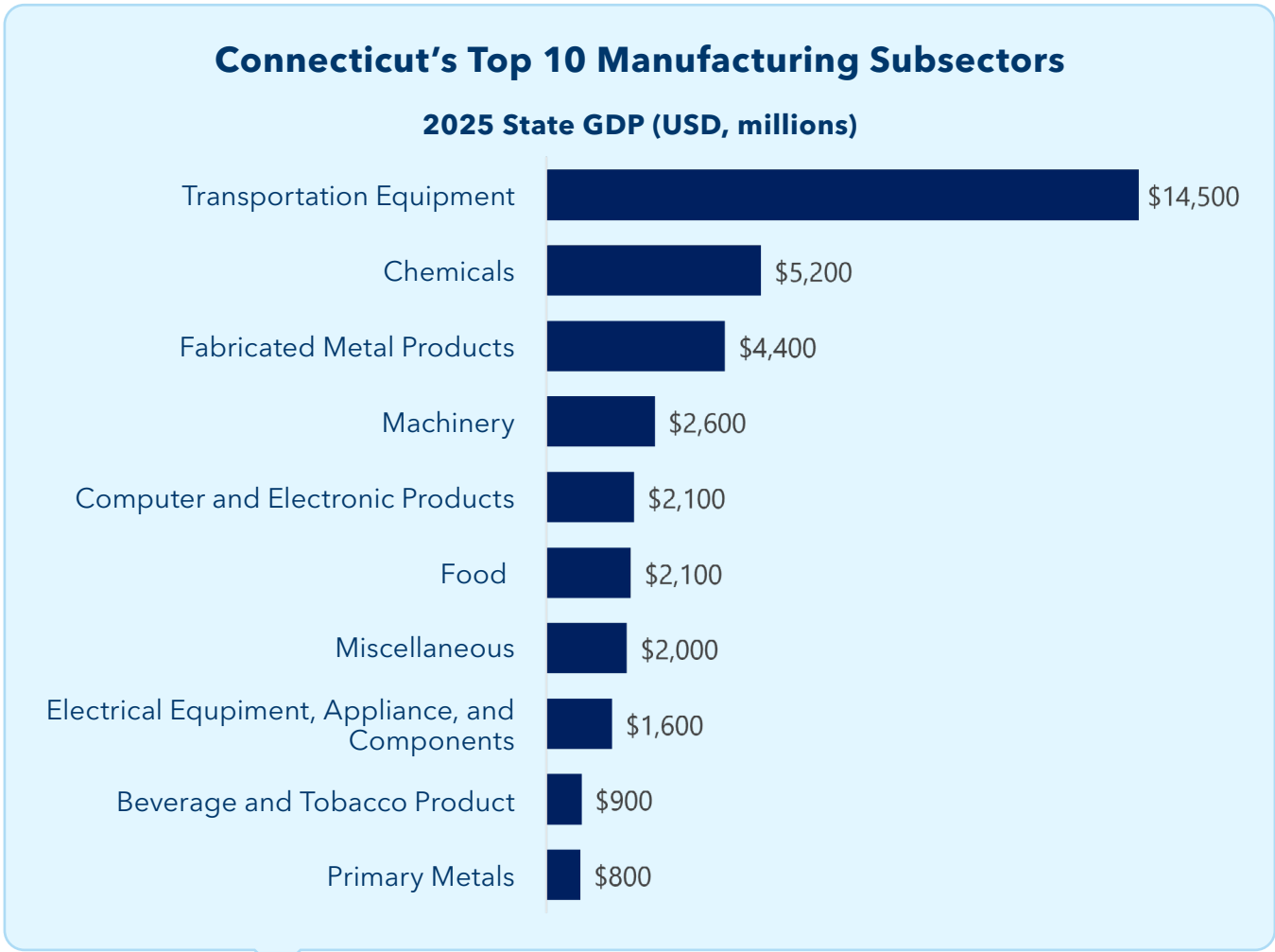
Pratt & Whitney's Connecticut facilities play critical roles in producing the F135, the only engine powering all three variants of the F-35. More than 1,500 F135 engines have been delivered worldwide.[6]

GENERAL DYNAMICS Electric Boat

Electric Boat makes the world's most advanced nuclear submarine in Groton and earned the largest shipbuilding contract in Navy history of $76.6 billion in 2026.[7]

SOURCE: [1]QUANTUM CIRCUITS, ACCESSED AUG 2026. [2]QUANTUM CIRCUITS BLOG, OCT 2025. [3]TRUMPF PRESS RELEASE, MAY 2025. [4]ASML, ACCESSED AUG 2026. [5]GKN AEROSPACE PRESS RELEASE, SEP 2025. [6]RTX PRESS RELEASE, JUL 2026. [7]CBIA, JUL 2026.

Subsector Leaders



Manufacturing generates **10% of Connecticut's State GDP** with total output **over $39 billion**.

SOURCE: LIGHTCAST, 2025–Q3 2026 RELEASE; ADVANCECT CALCULATIONS.

Subsectors

ADVANCED MANUFACTURING SECTOR SNAPSHOT

ADVANCECT CONNECTICUT

Subsectors Overview

Aerospace & Defense

Semiconductor Equipment Manufacturing

Aerospace & Defense Innovation

Connecticut's aerospace and defense industry is built on more than a century of engineering expertise, collaboration, and problem-solving. From Sikorsky helicopters to Pratt & Whitney engines, the state remains a center of advanced aerospace manufacturing and innovation.

#2 state for defense contract spending per capita – over **$19B** total in 2024[1]

32% of Connecticut exports are **aerospace products and parts**[2]

SOURCE: [1]U.S. DEPARTMENT OF WAR, FY 2024–NOV 2025 RELEASE; U.S. CENSUS BUREAU, PEP, 2024; ADVANCECT CALCULATIONS. [2]U.S. DEPARTMENT OF COMMERCE, INTERNATIONAL TRADE ADMINISTRATION, 2025.

#1 state
for aircraft engine and engine parts manufacturing state GDP

#1 state
for aircraft engine and engine parts manufacturing employment concentration

15,100 jobs

14.7X JOBS COMPARED TO THE NATIONAL AVERAGE

$6.1 Billion State GDP

21% OF ALL U.S. AIRCRAFT ENGINE AND ENGINE PARTS ARE PRODUCED IN CT (BY GDP)

SOURCE: LIGHTCAST, 2025–Q3 2026 RELEASE; ADVANCECT CALCULATIONS

Leading the Way in Aircraft Engine Manufacturing

#1
in the U.S. for concentration of Aerospace & Defense Manufacturing employment[1]

SOURCE: [1]LIGHTCAST, 2025–Q3 2026 RELEASE. BASED ON AIRCRAFT; GUIDED MISSILES AND SPACECRAFT; SHIPBUILDING; ARMORED VEHICLES; SMALL ARMS AND AMMUNITION; COMMUNICATIONS EQUIPMENT; DETECTION, NAVIGATION, AND GUIDANCE INSTRUMENTS; AND SURGICAL APPLIANCES MANUFACTURING.

240
aerospace and defense manufacturing establishments in Connecticut[2]

47,800
aerospace and defense manufacturing jobs in Connecticut[3]

SOURCE: [2,3]LIGHTCAST, 2025–Q3 2026 RELEASE. BASED ON AIRCRAFT; GUIDED MISSILES AND SPACECRAFT; SHIPBUILDING; ARMORED VEHICLES; SMALL ARMS AND AMMUNITION; COMMUNICATIONS EQUIPMENT; DETECTION, NAVIGATION, AND GUIDANCE INSTRUMENTS; AND SURGICAL APPLIANCES MANUFACTURING.

HOME TO STRONG AEROSPACE & DEFENSE METROS

#1 Highest total jobs in aircraft engine and engine parts[4]
HARTFORD, CT MSA

#1 Highest GRP in aircraft engine and engine parts[5]
HARTFORD, CT MSA

#1 Highest employment concentration in shipbuilding & repair[6]
NORWICH, CT MSA

#2 Highest productivity in shipbuilding & repair[7]
NORWICH, CT MSA

#2 Highest total jobs in shipbuilding & repair[8]
NORWICH, CT MSA



SOURCES: [4,5,6,8]LIGHTCAST, 2025–Q3 2026 RELEASE; ADVANCECT CALCULATIONS. RANKINGS BY MSA. [7]LIGHTCAST, 2025–Q3 2026 RELEASE; ADVANCECT CALCULATIONS. RANKINGS BY MSA, AMONG METROS WITH AT LEAST 1,000 INDUSTRY JOBS.

Defense Tech

Connecticut's defense manufacturing capabilities span a diverse range of advanced technologies—from autonomous undersea systems and sensors to propulsion, additive manufacturing, and materials science. Together, these capabilities support complex defense platforms across air, sea, and other mission-critical applications.

Undersea Autonomous Systems

Uncrewed underwater vehicles and sensing

Propulsion

Engines and turbine components for aircraft

Additive Manufacturing

3D-printed metal parts for flight programs

Materials Science

Composites, adhesives and bonded structures

Sensors

Detection, targeting and awareness hardware

Subsectors

ADVANCED MANUFACTURING SECTOR SNAPSHOT

ADVANCECT CONNECTICUT

Subsectors Overview

Aerospace & Defense

Semiconductor Equipment Manufacturing

Powering Semiconductor Innovation

From the industry's earliest days through the present, Connecticut has played a critical role in the global microchip revolution.

PerkinElmer invented the first optical lithography machine in Connecticut, paving the way for ASML's domination of the EUV market.

ASML's Wilton campus combines its largest U.S. R&D and manufacturing operation with its only in-house optical fabrication, producing the precision optics and sensors its lithography systems depend on.

SOURCE: ASML, ACCESSED SEP 2026.

Connecticut ranks top five nationally in semiconductor machinery.

	Connecticut has at least **1,800** semiconductor machinery jobs, **up 67%** since 2021	Connecticut produces **$259,100** in GDP **per job** in this industry	Connecticut has **5.6x** the national concentration of these jobs
STATE RANK	**#5** JOBS COUNT	**#3** PRODUCTIVITY	**#3** CONCENTRATION

SOURCE: LIGHTCAST, 2025 – Q3 2026 RELEASE; ADVANCECT CALCULATIONS. RANKINGS BY STATE, AMONG STATES WITH AT LEAST 500 INDUSTRY JOBS.

Business Costs & Productivity

ADVANCED MANUFACTURING SECTOR SNAPSHOT

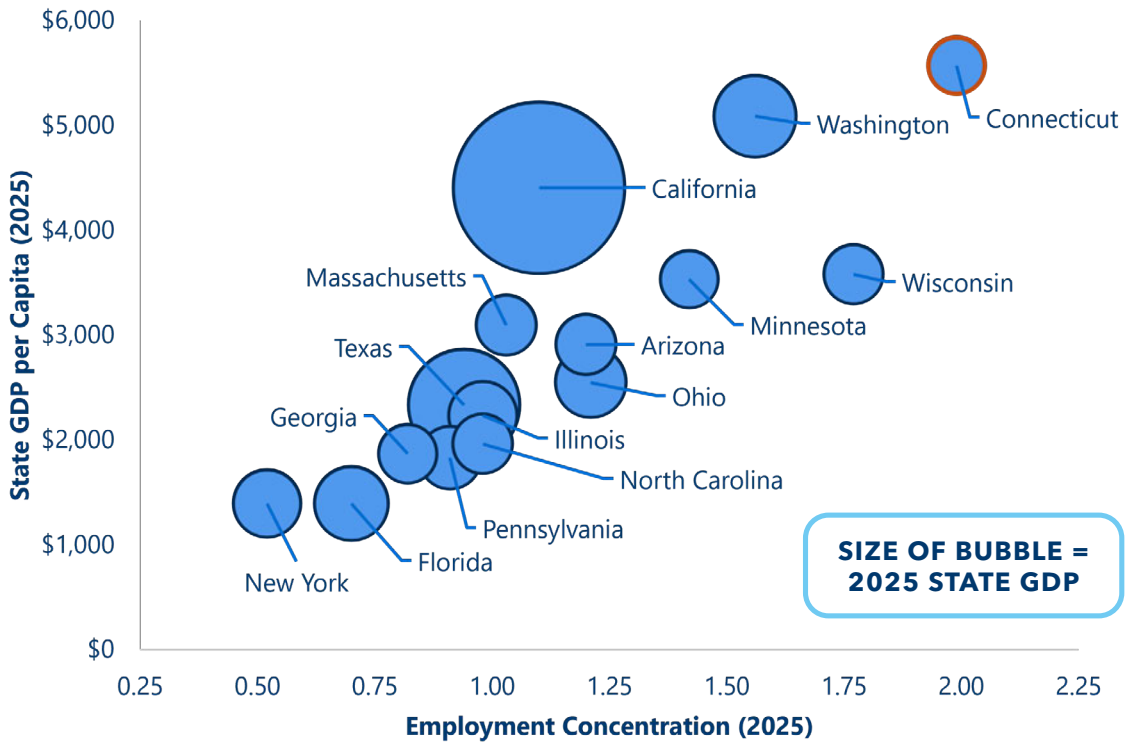
ADVANCECT CONNECTICUT

Connecticut manufactures some of the most technologically advanced products in the world, backed by decades of precision engineering expertise that few other states can match. Businesses gain access to that expertise at costs that remain competitive with other major manufacturing hubs, without sacrificing the quality Connecticut is known for.

Connecticut's workforce combines deep technical skill with strong productivity, giving companies more output for every dollar they invest in the state. The state reinforces that advantage through continued investment in education, business-friendly policy, and the infrastructure companies need to keep growing.

High Productivity, Greater Value

Advanced Manufacturing Leaders Comparison



Compared to other manufacturing hubs, Connecticut's advanced manufacturing sector is:

Most geographically concentrated

Most productive workforce

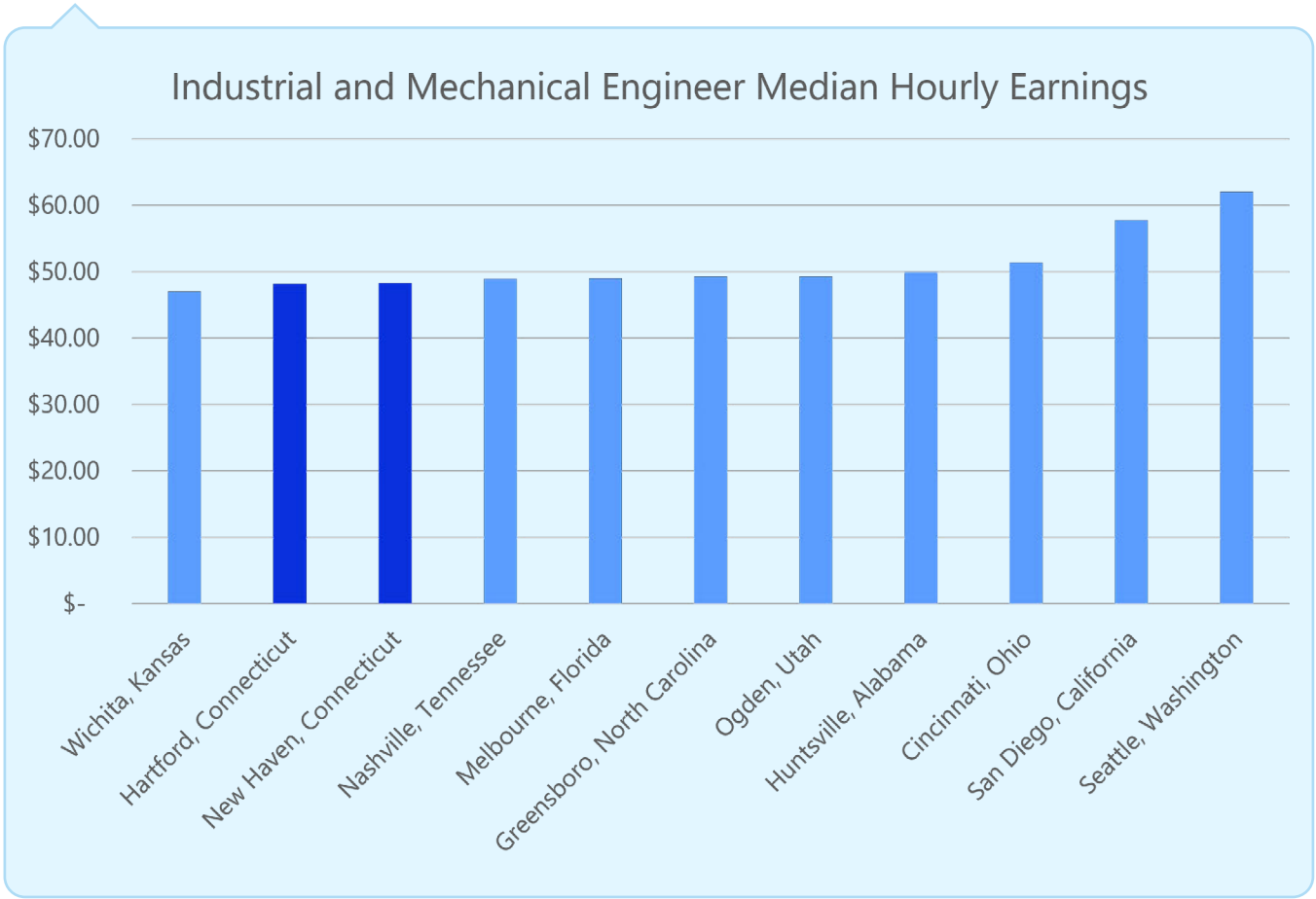
On par in size even with larger states

Known for precision high value manufacturing

SOURCE: LIGHTCAST, 2025–Q3 2026 RELEASE, ADVANCECT CALCULATIONS.

Nationally Competitive Talent Costs

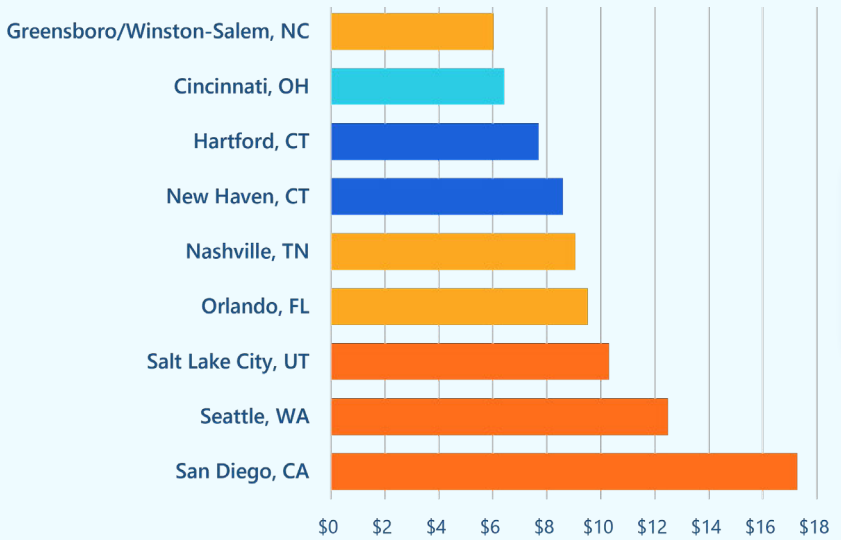
Even while Connecticut boasts an exceptionally skilled workforce, wages are on par with other geographies.



SOURCE: LIGHTCAST, 2025–Q3 2026 RELEASE. CITIES REPRESENTED BY MSA DATA.

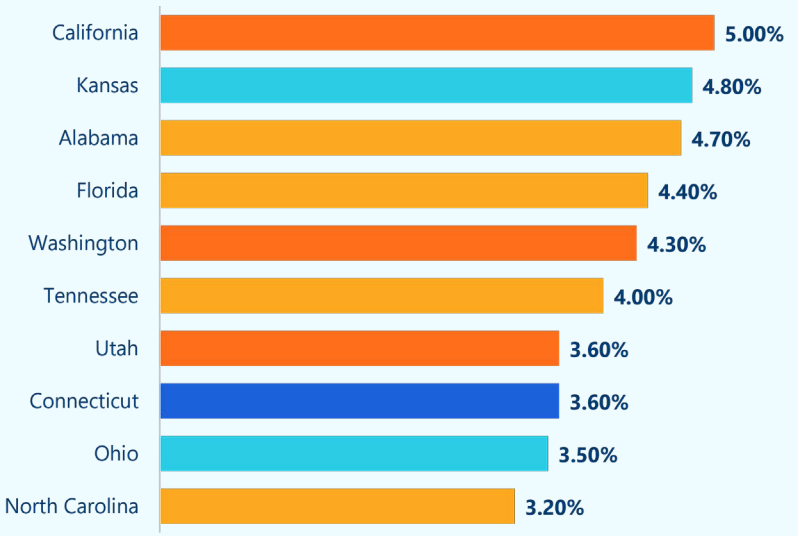
Property Rent & Tax Rates

Industrial Property Asking Rents[1]



Not only is Connecticut an advanced manufacturing industry leader, but it also has some of the **lowest industrial property rents** across the country.

Total Effective Business Tax Rates[2]



Connecticut's competitive tax rates are **lower than "low-cost" states**.

SOURCE: [1]CUSHMAN & WAKEFIELD, INDUSTRIAL MARKETBEAT, Q2 2026. [2]ERNST & YOUNG, FY 2024 – JAN 2026 RELEASE. TOTAL EFFECTIVE BUSINESS TAX RATE IS THE TOTAL TAXES PAID BY BUSINESSES IN A STATE DIVIDED BY THE TOTAL PRIVATE GROSS STATE PRODUCT (A MEASURE OF TOTAL TAXABLE BUSINESS ACTIVITY).

Investment & Demand Signals

ADVANCED MANUFACTURING SECTOR SNAPSHOT

ADVANCECT CONNECTICUT

Connecticut is drawing the capital and contracts that turn a strong manufacturing base into growth. Investors and global companies are increasing their commitment to the state's advanced manufacturing sector, backing growing companies and expanding their operations here. Record defense backlogs are driving hiring at the state's largest manufacturers. That demand is passing down to suppliers and lifting the economy across the state.

Capital is Flowing into Connecticut

Deal activity across Connecticut's advanced manufacturing sector shows sustained momentum and growing deal sizes.

380
Companies

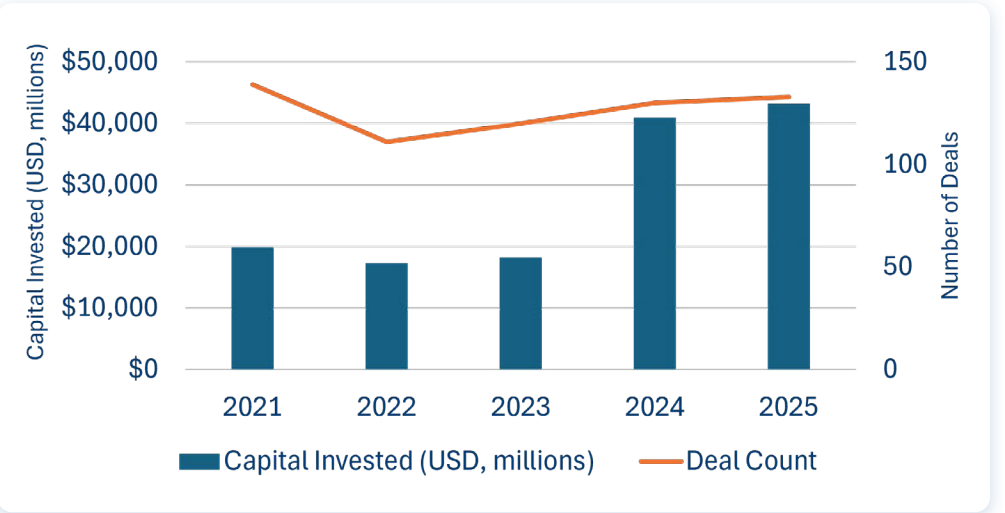
706
Deals since 2021

585
Investors

209
Exits

SOURCE: PITCHBOOK, 2026. TOTALS COVER JAN 2021 TO AUG 2026.

Bigger Deals, Steady Volume*



Highest Number of Deals by Industry

(2021-2025)*

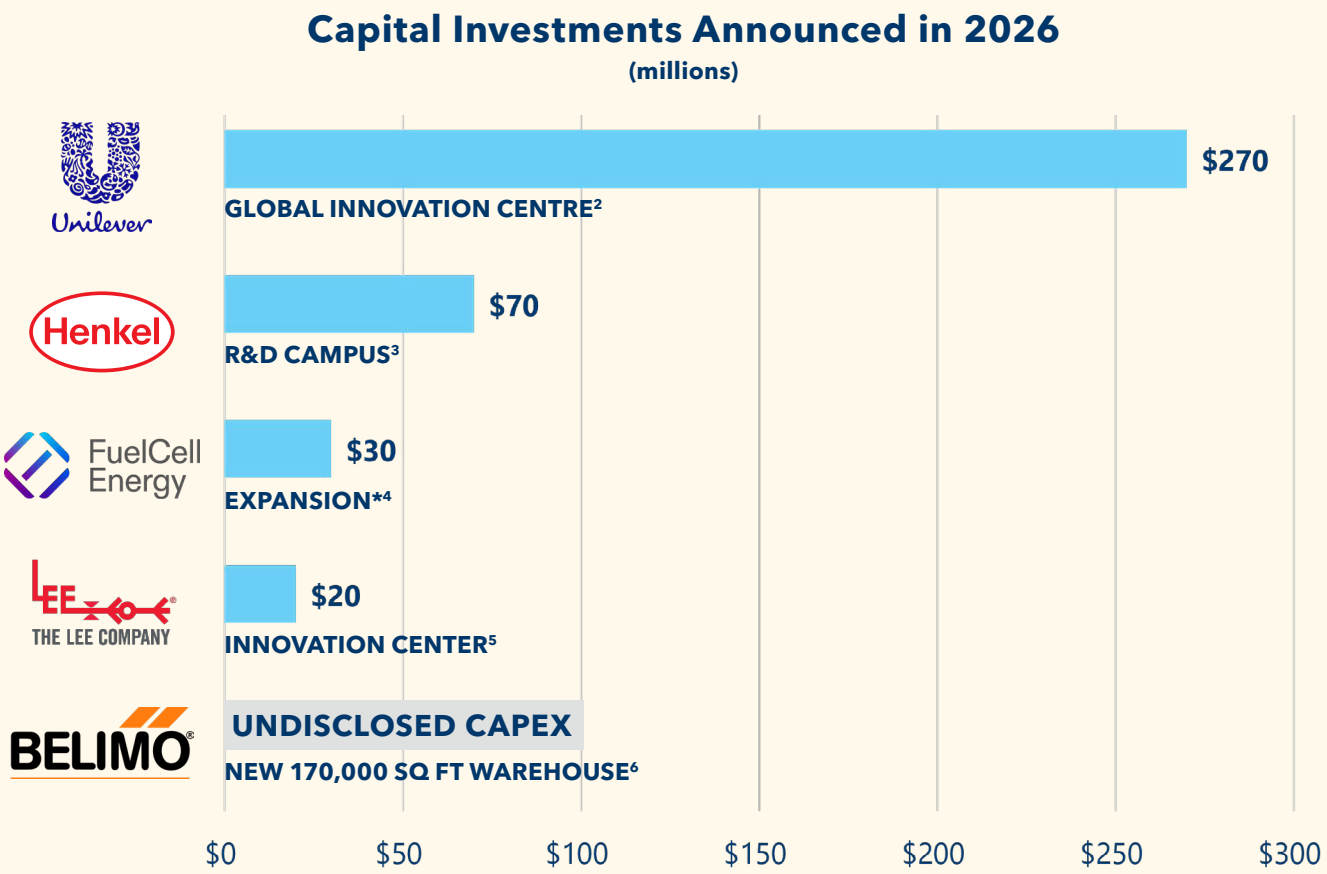
Industrial Supplies and Parts	**64 deals**
Aerospace & Defense	**60 deals**
Other Commercial Products	**29 deals**
Machinery (B2B)	**28 deals**

SOURCE: PITCHBOOK, 2026. CHART AND TABLE COVER FY 2021 TO FY 2025.

Major Capital Investment Landing in Connecticut

From medical devices to clean energy to innovation labs, Connecticut companies are committing capital to the state, building facilities, expanding capacity, and deepening their Connecticut footprint.

Unilever's $270 million Global Innovation Centre in New Haven will replace its Trumbull R&D site, which has operated since 1972, extending more than five decades of the company's presence in Connecticut.[1]



SOURCE: [1,2]UNILEVER, PRESS RELEASE, MAY 2026. [3]HENKEL, PRESS RELEASE, MAR 2026. [4]FUELCELL ENERGY, PRESS RELEASE, MAR 2026. *INVESTMENT UP TO $30 MILLION. [5]CT INSIDER, MAR 2026. [6]BELIMO U.S., INC. PRESS RELEASE, JAN 2026.

At the Center of a Defense Build-Up

PRIME DEMAND SURGE → PRODUCTION SCALING → SUPPLY CHAIN EXPANSION → STATEWIDE ECONOMIC IMPACT

Prime contractors hold billions in backlogs and are hiring in Connecticut — that demand is growing Connecticut's supplier base.

Primes Experience Record Backlogs, Active Connecticut Hiring

RTX

$289B

Backlog record hit with a new $1.3B F135 contract split mostly across four Connecticut sites[1]

SIKORSKY A LOCKHEED MARTIN COMPANY

$39.7B

Rotary and Mission Systems segment backlog held steady[2] as Stratford won a new $49.9M Army contract for Black Hawk engine upgrades[3]

GENERAL DYNAMICS Electric Boat

~$23B

Groton's estimated share of $76.6B Navy award announced July 2026 is 30%[4], with hiring already past the halfway mark to 8,000 new workers[5]

Dollar amounts represent backlog and contract awards experienced.

Prime Demand is Driving Supply Chain Expansion

REVENUE

$2.3B

RBC BEARINGS

Aerospace and defense revenue jumped 36.9% (defense +64.6%), with expansion confirmed at RBC's Oxford, Connecticut facility[6]

CONTRACT

$5M

RAMAR HALL Inc.

Expanding its Middlefield facility by 15,000 sq. ft. to meet growing aerospace supply-chain demand and increase production capacity[7]

WORKFORCE[8]

5,800

ARXIS KAMAN

Listed on Nasdaq in April 2026[9], Kaman's Bloomfield-based parent announced acquisitions of two defense and aerospace component makers in June 2026[10]

SOURCE: [1]RTX, Q2 2026 EARNINGS RELEASE, JUL 2026. [2]LOCKHEED MARTIN 10-Q, 2026. [3,4]U.S. DEPARTMENT OF WAR, 2026. [5]CT INSIDER ON MSN, JUL 2026. [6]RBC BEARINGS, Q1 2027 EARNINGS RELEASE, JUL 2026. [7]HARTFORD BUSINESS JOURNAL, SEP 2026. [8]PITCHBOOK, FY 2025. [9]ARXIS 8-K, APR 2026. [10]ARXIS PRESS RELEASE, JUN 2026.

State Support

ADVANCED MANUFACTURING SECTOR SNAPSHOT

ADVANCECT CONNECTICUT

Manufacturing sits at the center of Connecticut's economic strategy, and the state backs that priority with real investment rather than rhetoric. Financial incentives, workforce programs, export support, and a range of other services all work together to strengthen the state's supply chains and nurture a manufacturing ecosystem built to last.

That commitment doesn't stop at today's manufacturers. Connecticut is investing just as heavily in the education system and career pathways that will produce the workforce this industry needs for the next generation.

Investment & Support

EMBEDDED MANUFACTURING LEADERSHIP[1]

- The only state with a Chief Manufacturing Officer
- Officer chairs the Manufacturing Innovation Fund (MIF) board
- Ensures aligned policy, incentive design, and industry voice in government strategy
- Drives execution on workforce, capital access, and supply chain goals

SCALABLE WORKFORCE PIPELINE[2]

- 10,200 students engaged and 800 companies assisted through MIF programs in FY 25
- Every MIF dollar spent leveraged $3.4 in private investment
- $130M in total MIF funding authorized since the program's 2014 launch

STRATEGIC STATE INVESTMENT[3,4]

- $25M Supply Chain Initiative, administered by Department of Economic and Community Development
- Grants for supply chain companies expanding production capacity
- CT SMARTE helps small and medium-sized manufacturers gain efficiency through advanced technologies

INDUSTRY CONNECTIVITY & SUPPLIER NETWORKS[5]

- CONNEX Connecticut assisted 160 companies and held 130 events in FY 25
- Free digital platform connecting U.S. manufacturers and suppliers
- Accelerates procurement, sourcing, and in-state supply chain resiliency

Statewide Support for Manufacturing

Organizations across the state work together to promote manufacturing in Connecticut.

ADVANCE CT CONNECTICUT	CONNECTICUT CENTER FOR ADVANCED TECHNOLOGY	CONNECTICUT	cbia
BUSINESS ATTRACTION, EXPANSION & RETENTION	**TECHNOLOGICAL ADVANCEMENT**	**STATE SUPPORT**	**BUSINESS ADVOCACY**
connecticut innovations	MANUFACTURE	CONNSTEP a CBIA affiliate	UCONN UNIVERSITY OF CONNECTICUT Yale
VENTURE CAPITAL	**COLLABORATION OF CT MANUFACTURERS**	**BUSINESS GROWTH CONSULTING**	**WORLD-RENOWNED TALENT AND R&D**

SOURCE: [1]CONNECTICUT OFFICE OF MANUFACTURING, MANUFACTURING STRATEGIC PLAN VOL. 2, 2023–ACCESSED JUL 2026. [2,5]MANUFACTURING INNOVATION FUND ANNUAL REPORT, FY 2025. [3]CBIA, PRESS RELEASE, JAN 2025. [4]CONNECTICUT OFFICE STATE WEBSITE, CT SMARTE–ACCESSED JUL 2026.

QUESTIONS ABOUT EXPANDING YOUR BUSINESS IN CONNECTICUT? CONTACT:



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