



STATE OF  
MANUFACTURING  
**RHODE ISLAND**

# The 2025 State of Manufacturing Report tells the story of manufacturing in Rhode Island.



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### POLARIS

Christian Cowan, Executive Director

Matt Watson, Polaris MEP Center Director

Lindsey Brickle, Director of Workforce and Community Partnerships

Sarah Reggio, Director of Operations and Marketing

### CONSULTANTS

Cross Sector Consultants, LLP

Points Consulting, LLC

### PHOTOGRAPHY

Courtesy of Bel Air Finishing Supply Corporation, Community College of Rhode Island (CCRI), Flux Marine, Jaja Robotics, New England Institute of Technology (NEIT), Night Vision Technology Solutions, Inc. (NVTs), NIST MEP, and Regent Craft Inc.



# ACKNOWLEDGE SUCCESS

## RECOMMENDATIONS FROM 2022 RI STATE OF MANUFACTURING REPORT

1. Align with RI Innovates 2.0 Economic Development strategy
2. Connect social responsibility efforts such as affordable housing and public transportation to economic opportunities available in the manufacturing sector
3. Activate manufacturing leaders and align policy and resources to support statewide economic development strategy
4. Increase access to capital and expand technology acceleration programs
5. Increase partnerships and funding for automation modernization
6. Connect companies to education and training programs
7. Grow K-12 awareness and career pathways with industry 4.0 skills



THE SUMMER 2025 UPDATE OF *CHARTING A COURSE FOR THE FUTURE OF THE OCEAN STATE* HIGHLIGHTS ACHIEVEMENTS RELATED TO THE IMPLEMENTATION OF THE 2030 PLAN AND SHOWS APPLICATION OF THE 2022 RECOMMENDATIONS.

### **LAUNCHING THE BLUE YOUTH INNOVATION GRANT PROGRAM**

in collaboration with Rhode Island Commerce, the Department of Labor and Training, and the Community College of Rhode Island to increase student interest and skills in careers that support industries critical to the success of the Ocean Tech Hub. (success from recommendation #7)

### **SECURING A \$4.2 MILLION COMPETITIVE REGISTERED APPRENTICESHIP GRANT**

from the U.S. Department of Labor to expand work-based learning opportunities over a three-year period (July 2025–June 2028). (success from recommendation #6).

### **AWARDING OVER \$360,000 NETWORKING MATCHING GRANTS**

to five intermediary organizations that support small businesses in key industries such as food and agriculture, technology, energy, defense, manufacturing, and ocean economy. (success from recommendation #1 and #3)

### **AWARDING \$9.7 MILLION THROUGH THE INNOVATION CAMPUS GRANT PROGRAM**

in June 2025 to advance ocean technology commercialization and job creation in Rhode Island. (success from recommendation #1, #3, and #6)

### **LAUNCHING THE MANUFACTURING EQUIPMENT GRANT PROGRAM**

which will reimburse up to 50 percent of a cash purchase or 50 percent of a downpayment for a financed purchase, with a cap of \$25,000. (success from recommendation #1, #3, and #6)

### **INVESTED IN TECHNOLOGY CENTERS OF EXCELLENCE**

including Cloud Hosting, Low Code Applications, Data and AI, and Zero Trust Cybersecurity Architecture, to transform state operations and drive efficiency through technology. (success from recommendation #1 and #4)

Numerous other accomplishments relate to education, infrastructure and energy, and healthcare – all of which impact the manufacturing sector. Bold moves have served as a catalyst for economic transformation and set the stage for Rhode Island manufacturing to become a bigger driver of GDP and equitable economic opportunities.



## REPORT METHODOLOGY

Polaris MEP assembled a team of subject matter experts from Points Consulting, LLC and Cross Sector Consulting, LLP to assist in producing the 2025 State of Manufacturing Report. This same team supported the analytic process that resulted in the publication of the 2022 State of Manufacturing Report.

The 2025 State of Manufacturing Report tells the story of manufacturing in Rhode Island through a combination of sources include:

- ▶ 2025 INDUSTRY TRENDS REPORT
- ▶ 2025 VOICE OF MANUFACTURING SURVEY (VOMS)
- ▶ REVIEWS OF STATEWIDE AND REGIONAL PLANS RELEVANT TO MANUFACTURING AND ECONOMIC DEVELOPMENT
- ▶ INSIGHTS SHARED BY MANUFACTURING RESOURCE PARTNERS
- ▶ INSIGHTS SHARED BY ELECTED OFFICIALS AND COMMUNITY LEADERS



“NUMEROUS OTHER ACCOMPLISHMENTS RELATE TO EDUCATION, INFRASTRUCTURE AND ENERGY, AND HEALTHCARE – ALL OF WHICH IMPACT THE MANUFACTURING SECTOR”

# 2025 INDUSTRY TRENDS REPORT

The 2025 Rhode Island Manufacturing Industry Trends builds on its 2022 namesake report and provides information to help Rhode Island’s manufacturing resource partners and thought leaders strengthen the state’s manufacturing industry. The analysis examines industry trends in areas such as (a) overall employment, wages, and productivity, (b) economic significance, (c) industry specialization, (d) geographic distribution, (e) energy consumption in manufacturing, and (f) growth and competitive drivers in manufacturing and technology clusters as well as explores supply chain connectivity, workforce trends, and skills & credential trends. Many of the metrics mirror those found in the previous report. The 2025 version includes new data such as energy consumption and comparisons of industry clusters and market landscape to present a more complete picture of manufacturing in Rhode Island.



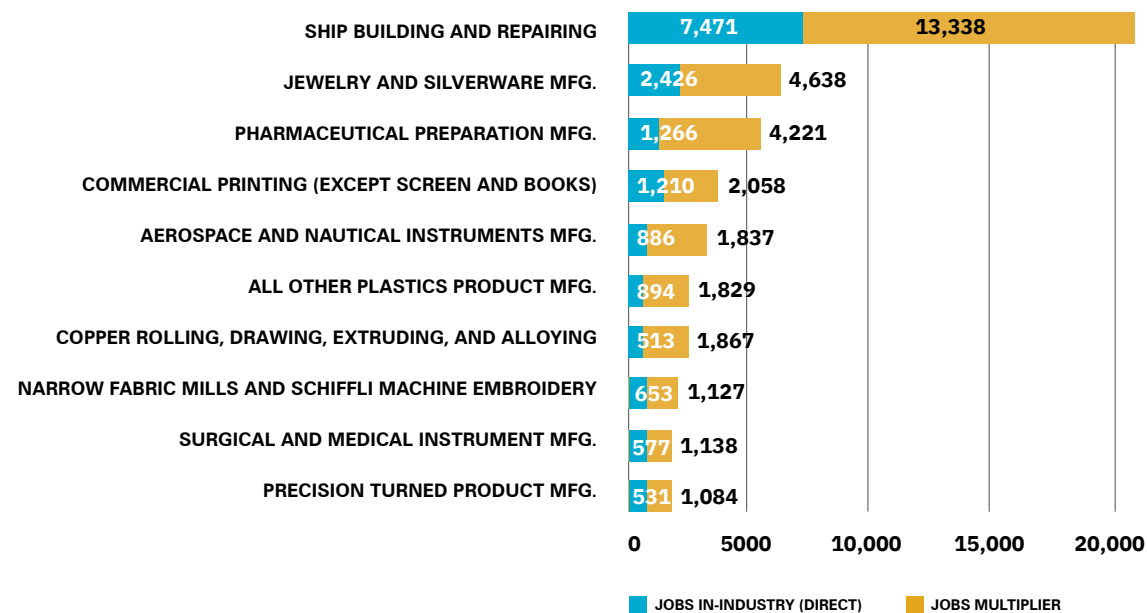
## Distribution of Manufacturing by Employment Industry Group

- ▶ TRANSPORTATION EQUIPMENT **19.8%**
- ▶ FABRICATED METAL PRODUCTS **10.5%**
- ▶ MISCELLANEOUS **9.9%**
- ▶ FOOD **9.8%**
- ▶ COMPUTER & ELECTRONIC PRODUCTS **8.6%**
- ▶ CHEMICALS **6.3%**
- ▶ PLASTICS & RUBBER PRODUCTS **5.8%**
- ▶ MACHINERY **4.8%**
- ▶ PRINTING & RELATED SUPPORT ACTIVITIES **3.8%**
- ▶ TEXTILE MILLS **3.6%**
- ▶ ALL OTHER MANUFACTURING **17.1%**



THE SUMMARY DOCUMENT INCLUDES HIGHLIGHTS OF RESULTS WHERE SHIFTS OCCURRED IN THE PERSPECTIVES OF MANUFACTURING LEADERS SINCE 2022

## Jobs Multiplier Effect of Selected Industries



## 2025 VOICE OF MANUFACTURING SURVEY

Polaris MEP’s 2022 Voice of Manufacturing Survey (VOMS) was the first to focus exclusively on the challenges facing our state’s manufacturers. Results of the survey captured data points identifying what assistance manufacturers need to find greater success; what legislators and policy makers should know; current trends and other information vital to the sector. The 2025 VOMS posed similar questions about economic outlook, sales, workforce, automation, and robotics, among other critical business issues that affect market competitiveness. 198 manufacturing industry leaders responded to the survey between June and September 2025 and represented roughly 125 distinct manufacturers. The summary document includes highlights of results where shifts occurred in the perspectives of manufacturing leaders since 2022 and current data trends.





# VOICE OF MANUFACTURING SURVEY THEMES

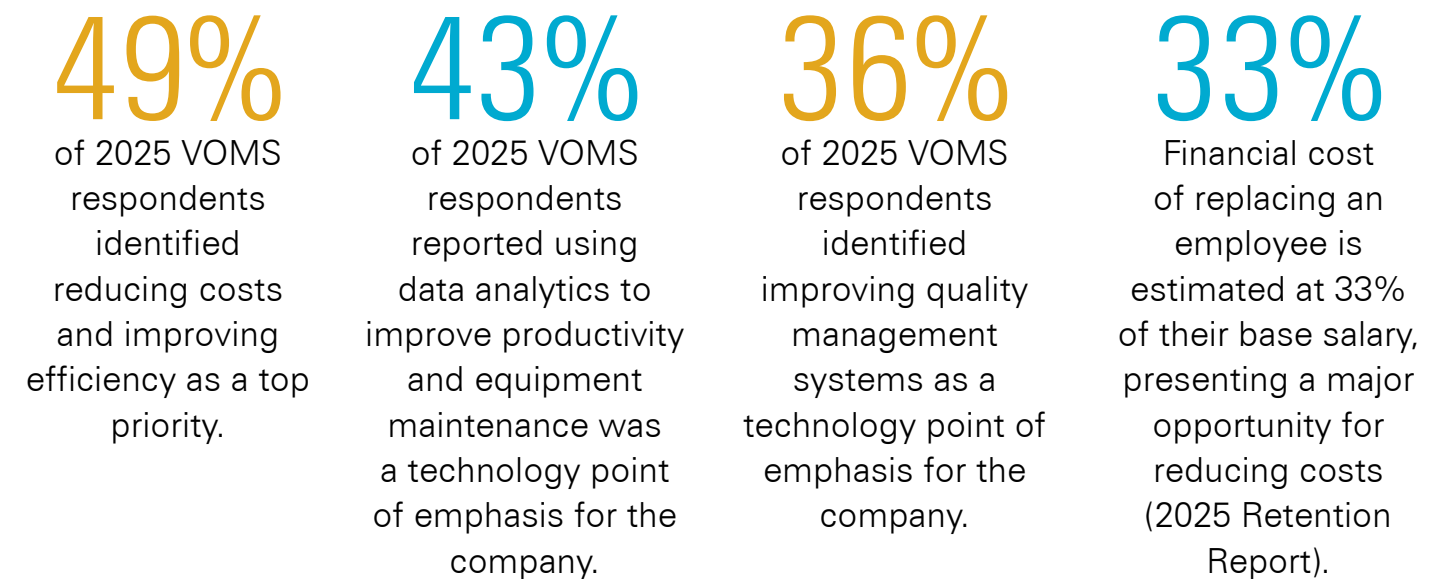
This section of the 2025 report contains additional discussion around four themes that emerged from the Industry Trends Report, the results of the VOMS, and the perspectives of industry partners and stakeholders.

1. **REDUCE COSTS.** Lowering energy usage, limiting waste (time and materials), localizing supply chains, and using alternative materials all provide costs savings.
2. **STRENGTHEN TALENT PIPELINES.** Manufacturing workers earn the highest average annual wages of any industry. Worker shortages and skills gaps are still a primary concern of manufacturers, despite over 75% of turnover being preventable departures (2025 retention report).
3. **INCREASE TECHNOLOGY ADOPTION.** Smart manufacturing requires technology roadmaps, cybersecurity, equipment purchases, and training.
4. **EXPAND INTO NEW MARKETS.** New products, new contracts, new markets, production reliability, and competitive pricing affect market share.

Recommendations directly related to providing manufacturing industry specific growth opportunities are provided near the end of this report. Recommendations such as increasing affordable housing, increasing access to childcare, increasing energy resilience, focusing on career development and flexibility, and reducing business costs affect industry sectors beyond manufacturing and are reflected in other statewide plans.

## REDUCE COSTS

Reducing costs involve lowering energy usage, limiting waste (time and materials), localizing supply chains, and even using alternative materials.



Rhode Island is “all in” with respect to implementing an energy resilience agenda. Understanding how much energy manufacturing clusters consume each year provides valuable insight into what the clean energy sector must be able to supply. Reducing energy costs through operational excellence, use of new materials, lowering energy use, or locally sourcing translates to a more competitive product and the possibility to enter new or expand existing markets. Increasing productivity reduces per production unit costs. This can involve a variety of solutions ranging from adjusting plant layout, Lean projects, automation, and value-engineering redesign.

### Several initiatives are underway to support cost reduction strategies. Examples include:

- **Polaris MEP** offers a suite of services focusing exclusively on Lean and continuous quality improvement that effectively increases productivity and reduces wastes.
- **Polaris MEP** provides services that assist with localizing supply chains; identifying opportunities to reduce energy usage; and implementing sustainable practices that lower costs while improving competitiveness.
- **RI Commerce** operates the Manufacturing Equipment Grant Program that provides reimbursement grants of up to \$25,000 to help eligible Rhode Island manufacturers defray the cost of purchasing new or used manufacturing equipment/machinery to modernize, improve or expand manufacturing processes.
- **Qualifying Rhode Island manufacturers** can take advantage of the Manufacturing Tax Credit equal to a percentage of the wages paid to employees in eligible manufacturing positions.
- **Businesses investing in renewal energy** projects such as solar or wind power systems may be eligible for tax credits and incentives to offset the costs of installation and equipment purchases.

The above programs produce significant, measurable impacts, a clear return on investment, and provide sufficient evidence for their continuation and expansion.

## CASE STUDY

# BEL AIR FINISHING SUPPLY CORPORATION

## BEL AIR FINISHING SUPPLY CORPORATION

North Kingstown, Rhode Island  
[www.belairfinishing.com](http://www.belairfinishing.com)

Mass finishing is a batch-processing method that uses abrasive media to polish, deburr, refine, clean, or dry parts to achieve superior surface quality. The benefits of mass finishing include the elimination of inconsistent hand polishing and deburring, reduction of costs on scrap parts and labor, decrease in parts travel and takt time, and assembly-ready parts.

According to Steven Alviti, Vice President of Bel Air Finishing Supply Corporation, located in North Kingstown, RI, "Nearly all manufactured parts require some amount of surface improvement prior to final assembly. Mass finishing is a transformative process that creates significant production value."

From basic to the most complex surface finishing applications, Bel Air provides solutions by integrating Robotics, Metrology, Automated Vision Systems, Material Handling, Wastewater Treatment and Dust Collection Systems. Alviti describes the

"Nearly all manufactured parts require some amount of surface improvement prior to final assembly. Mass finishing is a transformative process that creates significant production value."



process in simple terms, "First, a client sends us a part. Second, we develop and document the ideal finishing process. Third, we manufacture the equipment and supply the media and compounds optimized for performance and cost."

Behind the scenes, the Bel Air Process Technology Center plays a critical role in each client engagement. Engineers and expert technicians work with clients to identify innovative technology to achieve the ultimate finishing process for the specific application. The Bel Air's Metrology Department demonstrates how to qualify the surface finish with shop floor metrology equipment – eliminating the need to move the product to a separate inspection line.

Bel Air supports manufacturing processes across a wide range of clients (and industries) such as GE Aviation (aerospace), Medtronic (medical devices), Saint-Gobain Corporation (construction, industrial), Goodrich (automotive), and Sig Sauer (firearms) who rely on mass finishing to meet performance and aesthetic standards. Its primary clients are smaller manufacturers that supply original equipment manufacturers and prime contractors.

This third generation Rhode Island company helps other manufacturers succeed by offering workshops and seminars on improving their mass finishing process. More so, Bel Air intends to double down on its efforts to engage the local workforce and play a larger role in multiple priority industry sectors in the state through its on-site training programs including internship opportunities, expand its visibility within manufacturing-related networks such as RIMA and SENEDIA, and collaborate with Polaris MEP to assess how automation and AI affects the company.

BEHIND THE SCENES, THE BEL AIR PROCESS TECHNOLOGY CENTER PLAYS A CRITICAL ROLE IN EACH CLIENT ENGAGEMENT.

# STRENGTHEN TALENT PIPELINES

50,700 individuals work in manufacturing jobs and are employed primarily by companies with less than 50 employees. Manufacturing workers earned annual average wages of \$89,270 or \$10,000 higher than all other industries. One third of the manufacturing workforce is aged 55 or older.

- The number of job postings requiring a bachelor’s degree increased 356.7% over the past 14 years, while postings with no education requirement listed rose 192.9%. This trend likely reflects demand for workers who can support automation. At the same time, many lower-skill jobs without formal education requirements remain unfilled, and many skills-based programs (instead of academic focused) are focusing on upskilling and training for Industry 4.0 without necessarily completing a 4-year or even 2-year degree program.
- Software Developers & Production Workers saw the largest job growth since 2010, mirroring the demand for occupations requiring higher levels of education or no specific education requirements. An analysis of current job posting data shows Machine Operators and Maintenance Technicians as the most in demand occupations.
- One third of the manufacturing workforce is over the age of 55.
- Over the past 20 years, the share of Hispanic workers rose 5.7%, while the share of White workers in manufacturing declined 9.0%. Asian and Black or African American workers each increased about 1.0%.

## Manufacturing leaders participating in the 2025 VOMS identified availability of skilled labor as the top limiting factor affecting company growth.

THE BIGGEST OBSTACLE FOR FINDING QUALIFIED WORKERS IS RELATED TO LACK OF TECHNICAL SKILLS OR EXPERTISE.

**1 IN 2**

respondents indicated they would “hold steady” (not hire) on current level of production and operation workers.

**4 OUT OF 5**

respondents provide on-site technical training opportunities.

**1 OUT OF 5**

involved in Registered Apprenticeship Programs.

**ONE THIRD**

participate in manufacturing sector training initiatives.

All of which represent increases since 2022.

50,700 individuals work in manufacturing jobs and are employed primarily by companies with less than 50 employees.



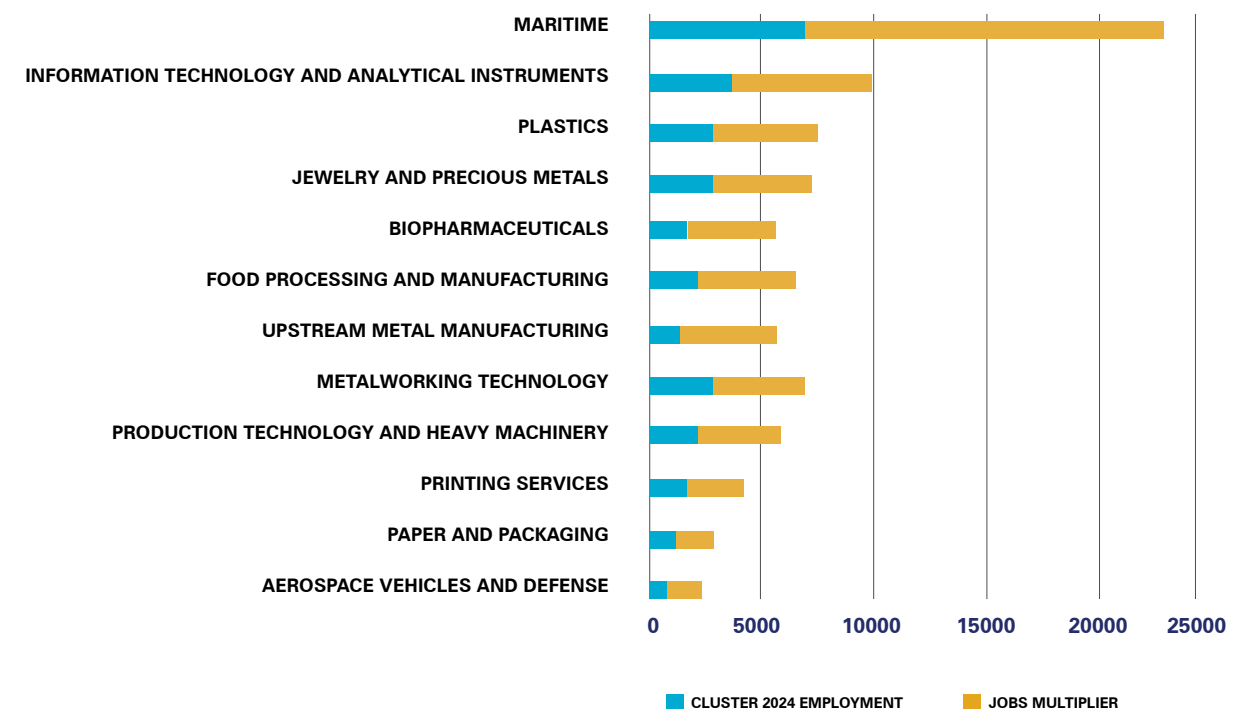
“The current and future success of Senesco Marine relies on the talents of world-class shipbuilders in occupations such as fitters, welders, mechanics, and inhouse, engineers...”

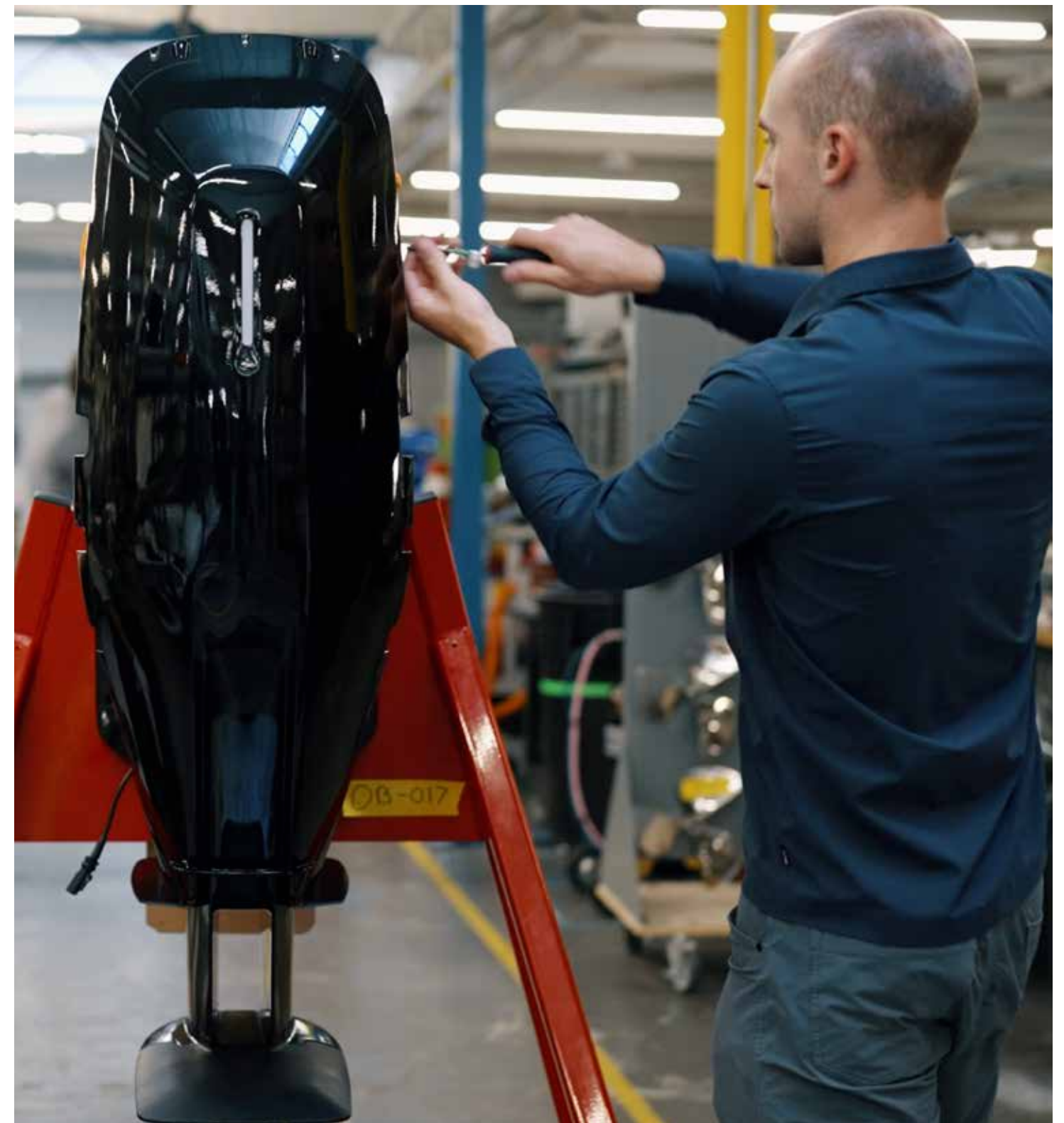
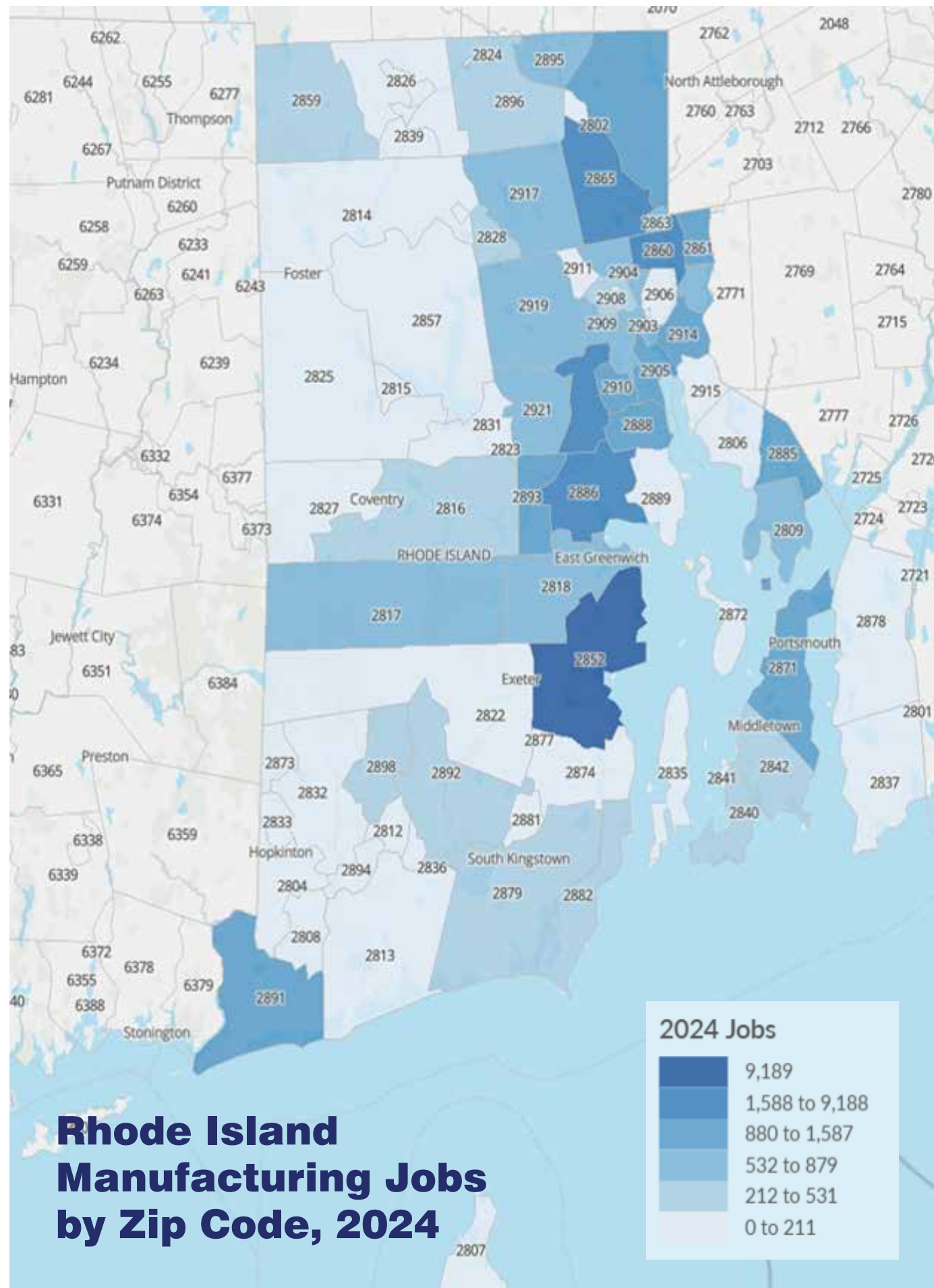
- Ted Williams, President of Senesco Marine

Manufacturers are increasingly looking for workers who can use digital tools and understand programming languages. Workers who aren’t comfortable with these tools may be at risk of falling behind as more tasks move toward tech-enabled roles. A shift toward digital processes might attract younger, tech-savvy workers who see opportunities to apply new technology in physical production.

RI 2030, The Future of the Ocean State lays out an ambitious agenda to strengthen K-12 education to meet future employment needs and provide businesses with well-trained employees. Strategies include modernizing educational facilities, changing high school graduation requirements to include career readiness, and expanding work-based learning. Workforce programs must prepare individuals to work, helping to address systemic barriers to sustained training and high growth career pathways.

## Manufacturing Cluster Employment Rhode Island





Workforce programs must prepare individuals to work, helping to address systemic barriers to sustained training and high growth career pathways.



Efforts are underway to re-imagine manufacturing-related talent development pipelines.

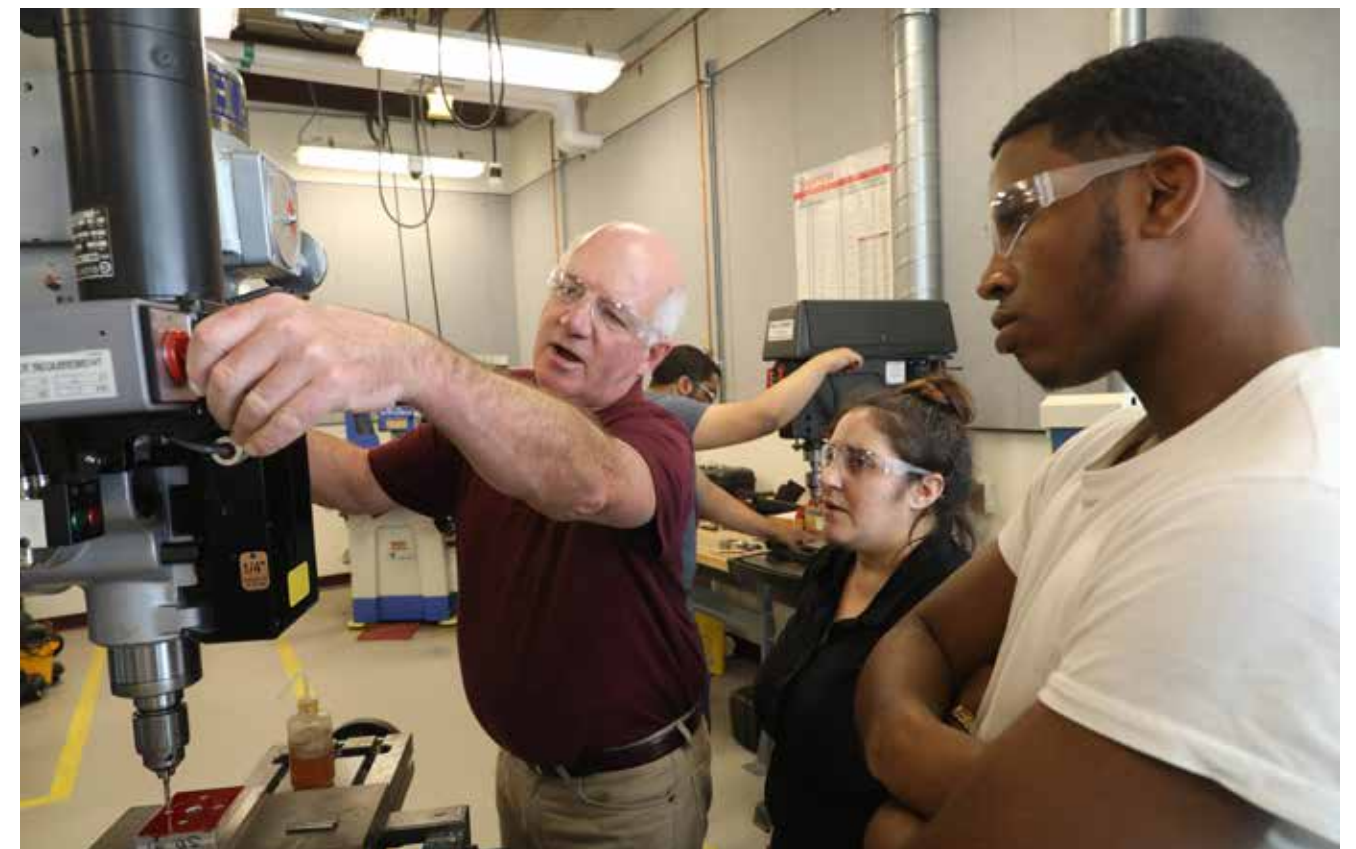
Moreover, RI 2030 includes strategies to increase alignment and coordination between state agencies and stakeholders to expand pathways to careers in clean energy, sustainability, renewables. Rhode Island must expand equitable access to the skilled workforce and, further, increase programming in the trades. Efforts are underway to re-imagine manufacturing-related talent development pipelines. For example:

- **REAL JOBS RI**, a business-led workforce development initiative, involves a network of employers, training providers, and community organizations that address placing new employees into immediate job openings, upskilling current employees to advance skills or remain competitive, helping business owners and entrepreneurs advance their ventures, and creating talent pipelines. RI Reconnect supports Real Jobs learners and trainees to help reduce barriers to training and employment.
- **PREPARERI** is run by an inter-agency task force consisting of staff from the Department of Education, the Office of the Postsecondary Commissioner, and the Governor's Workforce Board. The initiative consists of a variety of individual programs with the goal of preparing students for in-demand jobs.
- **APPRENTICESHIP RI** continues to expand non-trade apprenticeship programs. Currently, 282 non-trade apprentices are active with the largest number of apprentices in occupations such as Maritime Steel Shipfitter and Welder, and Maritime Electronics Technician.
- **POLARIS MEP** and its partners work with industry to identify workforce needs; create training programs; and upskill individuals.
- **COMMUNITY COLLEGE OF RHODE ISLAND (CCRI)** offers Fast Track to CNC Manufacturing boot camps, certificates, and associate degrees in Advanced Manufacturing & Design, plus apprenticeship preparation aligned with industry needs.

- **JARC RI** provides advanced manufacturing training in CNC machining, welding, and will be introducing automation training, along with customized incumbent worker training to help employers upskill their teams.
- **NEW ENGLAND INSTITUTE OF TECHNOLOGY (NEIT)** home to the Shipbuilding and Advanced Manufacturing Institute (SAMI), NEIT delivers accelerated degree programs and hands-on technical training in collaboration with major employers like Electric Boat.
- **IYRS SCHOOL OF TECHNOLOGY & TRADES** specializes in hands-on programs for Composites Technology, Digital Modeling & Fabrication, and Marine Systems, supporting high-skill careers in marine, aerospace, and advanced manufacturing.
- **STEEL YARD** offers welding workforce training and paid apprenticeships in industrial arts and fabrication, creating pathways to skilled trades careers.
- **WE MAKE RI** provides free, state-funded training for unemployed or underemployed residents in general manufacturing, materials handling, and industrial sewing, with job placement support.

Education and training partners are moving quickly to adapt to manufacturers' demand, but challenges remain. Industry needs are evolving, students and job seekers vary in their willingness to commit to longer-term programs, and lifestyle shifts—such as remote work preferences—continue to influence career choices.

Despite these uncertainties, the outlook is encouraging (see featured spotlight). New collaborations, accelerated training models, and innovative programs are emerging to align skills with advanced manufacturing requirements, signaling strong potential for success. Increased technical training for non-degree programs promises higher earning potential and career growth pathways in manufacturing.



CASE STUDY

# NIGHT VISION TECHNOLOGY SOLUTIONS, INC.

## NIGHT VISION TECHNOLOGY SOLUTIONS, INC.

North Kingstown, Rhode Island  
[www.nvtsglobal.com](http://www.nvtsglobal.com)

NVTS (Night Vision Technology Solutions) designs and manufactures innovative and cost-effective night vision camera systems for military and commercial applications that help keep the nation safe. NVTS camera systems support U.S. Armed Forces, homeland security, shipboard and port security applications. NVTS has earned recognitions such as the New England Exporter of the Year and the Providence Business Journal's Technology Innovation Award.

The company, headquartered in North Kingstown, is a certified United States Service-Disabled Veteran-Owned Small Business. Joe Janson, a U.S. Coast Guard veteran with a distinguished record of service started NVTS in response to supporting a critical U.S. Navy requirement. Since then, NVTS has been on an

The company benefits from the high concentration of vendors in Rhode Island and the New England region that support the Defense Industrial Base, including live testing on boats.



upward trajectory, continuously expanding its product offerings to cater to various defense applications.

Electro-Optical / Infrared (EO/IR) camera systems are essential for reliable performance in extreme conditions to support military and defense applications including autonomous surface and ground vehicles. According to Greg Klein, NVTS Engineering Production Manager, "NVTS occupies a unique and exciting niche in next generation technology that will continue to grow."

The company benefits from the high concentration of vendors in Rhode Island and the New England region that support the Defense Industrial Base, including live testing on boats.

Technology acceleration and customized solutions specific to client needs means that the NVTS team must stay current as advancements occur in sensor fusion and integration with AI-driven analytics. Klein shares that "NVTS must employ a workforce that wears multiple hats – supporting production and helping the company grow."

NVTS's relentless pursuit of developing innovative products reflects Janson's commitment to collaboration. Janson states, "Don't fall in love with your own ideas. Listen to the customer." NVTS stays connected to manufacturing networks and resources. For example, CEO Janson serves as a board member for the U.S. Commerce Department's Rhode Island District Export Council, and NVTS partners with groups such as SENEDIA and Polaris MEP.

NVTS has consistently proven itself as an industry leader in advanced defense technologies, and a valuable contributor to the manufacturing economy.





## INCREASE TECHNOLOGY ADOPTION

Manufacturing leaders participating in the 2025 VOMS placed a premium on modernization and technology acceleration.

**50%**

of respondents identified new technology, equipment or automation as a top priority.

**35%**

reported already scaling or sustaining an automation agenda to address workforce challenges.

**54%**

The top technology topics of focus for the company included automation of production processes (54%), use of data analytics to improve productivity and equipment maintenance (43%), address and improve quality management systems such as ISO (36%), and increasing cybersecurity (35%).

**28%**

reported being very confident the company was secure from hacking, data breaches, or other technological threats. Cybersecurity represents a necessary but not sufficient condition for automation and use of AI.



## CASE STUDY

# FLUX MARINE



Alex Plante: Flux Marine Integration Technician and IYRS alumnus

## FLUX MARINE

Bristol, Rhode Island  
[www.fluxmarine.com](http://www.fluxmarine.com)

Flux Marine, located in Bristol, RI, designs and manufactures integrated electric powertrain systems that enable boat builders to electrify their vessels. The company's propulsion platforms deliver fast acceleration, quiet operation, high efficiency, and reduced maintenance compared to conventional combustion systems.

"Our product applies clean electric technology to demanding marine use cases," says Jonathan Lord, Co-Founder and Chief Technology Officer. Flux Marine's high-performance battery packs, battery management systems, and power electronics are purpose-built for saltwater exposure, vibration, and sustained commercial duty cycles. Integrated software provides operators with real-time system data to support safe operation, while a connected mobile interface enables remote monitoring and diagnostics. Flux powertrains are deployed across commercial vessels—including aquaculture and near-shore workboats—designed for rugged, high-utilization environments.

"Flux Marine exemplifies the next generation of companies advancing Rhode Island's Blue Economy Strategy and supporting the transition to modern, electric maritime systems."

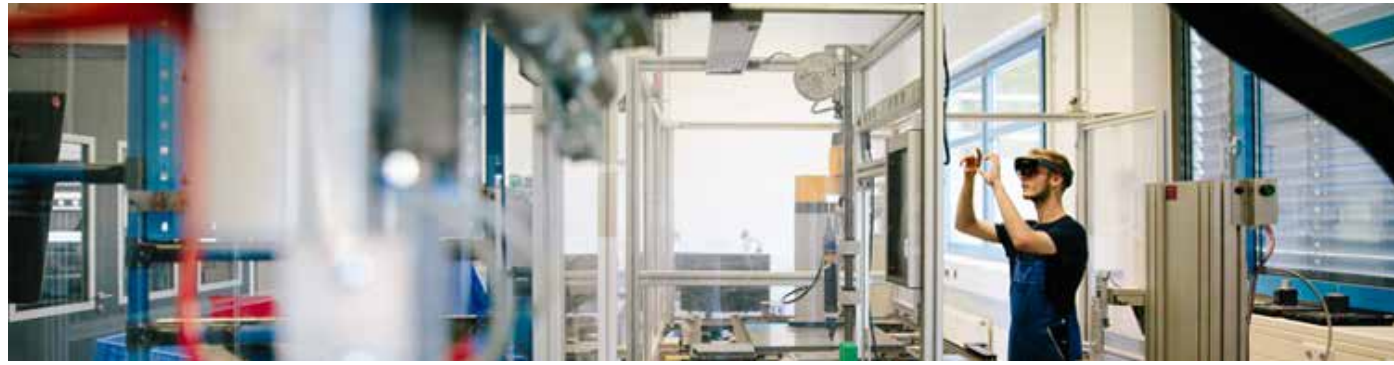


The adoption of electric propulsion in the maritime industry represents a structural shift that extends beyond replacing internal combustion engines. It requires coordinated advances in battery energy density, charging capability, power management, and vessel integration. "The long-term outlook for electric propulsion is strong," says Lord, "but progress comes with real engineering and operational challenges." Some of these challenges lie outside Flux Marine's direct control, including the pace of shoreside charging infrastructure deployment and the evolution of energy resilience policies and incentives.

The State's investment in its Blue Economy Strategy has created more favorable conditions for electrification within the maritime sector. Flux Marine's focus on advanced electric powertrains and commercial marine applications supports both workforce development and long-term industry growth in Rhode Island. The company works with partners such as Polaris MEP to strengthen its manufacturing processes, leverages internships and training programs to develop talent, and actively pursues capital, grants, tax incentives, and new markets, including defense and government applications.

Flux Marine exemplifies the next generation of companies advancing Rhode Island's Blue Economy Strategy and supporting the transition to modern, electric maritime systems.





Rhode Island is an emerging leader in manufacturing innovation, with companies like General Dynamics Electric Boat and Raytheon. The state's burgeoning maker movement is reshaping design and product development when manufacturing goods. Design is in Rhode Island's DNA: Institutions like Brown University, Rhode Island School of Design, University of Rhode Island and Rhode Island College have helped shape the state's reputation as a leading producer of top industrial and graphic design professionals.

Numerous efforts are underway to support technology acceleration, the adoption of smart manufacturing, and even the use of Artificial Intelligence.

- ▶ **Polaris MEP and Polaris Tech Bridge's** scouting efforts connect manufacturers with the right technologies, and suppliers to solve critical challenges.
- ▶ **Rhode Island Commerce** and other state leaders continue to expand its broadband infrastructure.
- ▶ **SENEDIA and the Ocean Tech Hub** are driving Rhode Island's leadership in technology adoption and modernization through partnerships with defense and ocean technology sectors to accelerate integration of smart manufacturing practices, support workforce upskilling, and foster collaboration between industry, academia, and government.
- ▶ **Polaris MEP** continues to create programs that strengthens Rhode Island's manufacturing ecosystem by helping companies modernize through smart manufacturing, automation, and cyber resiliency.
- ▶ **RIHub** serves as Rhode Island's central innovation hub, connecting startups and manufacturers with resources to adopt advanced technologies.
- ▶ **RISE-UP** catalyzes innovation in the Blue Economy and advanced manufacturing focused on developing dual-use technologies for defense and commercial markets, fostering entrepreneurship, and building a skilled workforce in partnership with Alaska and Hawaii.
- ▶ See also Strengthening the Talent Pipeline.

Supporting technology adoption will require a higher level of collaboration among and between manufacturing ecosystem resource partners and additional resources to kickstart and expand awareness and integration.

## EXPAND INTO NEW MARKETS

Rhode Island manufacturers are increasingly focused on growth through diversification and market expansion, even as economic uncertainty persists. Compared to 2022, the 2025 Voice of Manufacturing Survey (VOMS) reveals a more cautious outlook:

**49%**

of respondents believe national economy would remain static or contract moderately or strongly (compared to 35% in 2022).

**64%**

expect the state economy would remain static or contract moderately or strongly (compared to 57% in 2022).

**13%**

forecast declining topline sales in 2025 (compared to 4% in 2022) and 13% anticipated posting a loss in 2025 (compared to 3.5% in 2022).

**64%**

of respondents planned to introduce a new product in 2025 (compared to 71% in 2022).

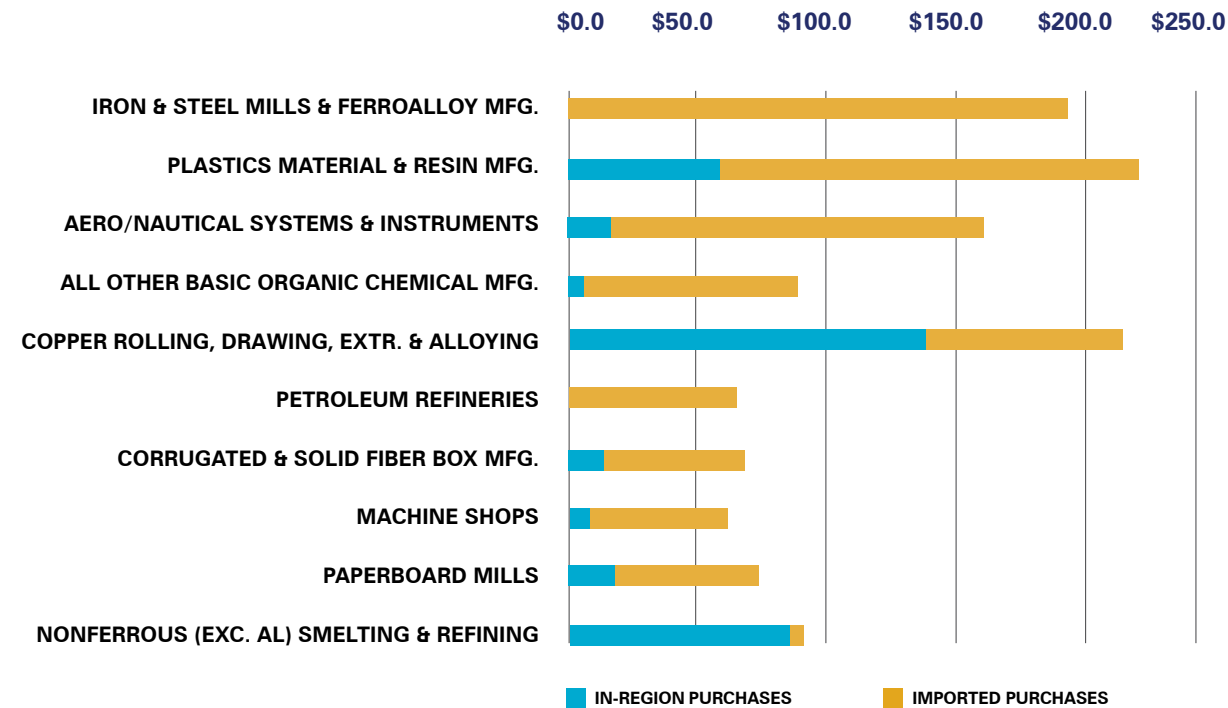
**47%**

of 2025 VOMS respondents identified finding or accessing new customers and markets as a top priority and nearly two in five indicated that it was the biggest driver for the company's future growth.



**RHODE ISLAND IS AN EMERGING LEADER IN MANUFACTURING INNOVATION**

# Largest manufacturing-Based Supply Chain Purchases from Outside of Rhode Island



Manufacturing requires raw and processed inputs to produce final products. This reliance means manufacturing impacts associated industries both upstream and downstream in the supply chain, including other manufacturers. In 2024, Rhode Island manufacturers purchased \$3.2 billion of goods from other manufacturers. Only \$837.8 million of those purchases (26.0%) came from in-state companies. Large “gaps” could be addressed either by recruiting businesses from out of state, or by helping existing firms expand their product lines to meet demand. Both options should be evaluated through the lens of efficiency.



## Federal level spending also presents opportunities for market expansion.

Rhode Island stands out as one of a few states with a uniquely high share tied to Department of Defense (DoD) contracts. Between FY19 and FY24, DoD was responsible for 88.6% of all manufacturing product-related federal purchases in Rhode Island. DoD spending has increased over the past several fiscal years and has risen an average of 29% year-over-year during the past two fiscal years.



In FY24 alone, Rhode Island companies were awarded more than \$1.6 billion in DoD contracts. Additionally, several other agencies including Department of Commerce (DOC), General Service Administration (GSA), and Environmental Protection Agency (EPA) commissioned over \$3 million to Rhode Island business in FY24. All federal orders were executed in FY24 by over 600 prime contractors in Rhode Island. Most of these businesses were small, with a median contract obligation of \$60K.

Increasing the knowledge and capacity of manufacturing supply chains will translate to more market opportunities for Rhode Island manufactures, especially given the dual-use (commercial and defense) product applications.

Numerous efforts are underway to assist manufacturing with expanding markets.

- **Polaris MEP** helps Rhode Island manufacturers identify supply chain gaps and connect with qualified suppliers. Through scouting and matchmaking, companies can localize sourcing, reduce costs, and strengthen resilience—unlocking new market opportunities both upstream and downstream.
- **RI Commerce** supports manufacturers by fostering supplier networks and offering programs that encourage in-state sourcing. These initiatives aim to close procurement gaps, expand local capacity, and position Rhode Island firms for growth in high-demand sectors.

“The company benefits from the high concentration of partners in Rhode Island and the New England region that support the Defense Industrial Base, including live tests on boats.”

- Greg Klein, NVTR Engineering Production Manager



- **Polaris Tech Bridge's** defense technology demonstration programs showcase innovations with dual-use potential—commercial and defense – giving Rhode Island manufacturers visibility, validation and opportunities to secure contracts, driving diversification and revenue growth.
- **Polaris MEP's** targeted networking events connect manufacturers with buyers, suppliers, and strategic partners in an effort to foster collaboration, open doors to new contracts, and strengthen relationships across the manufacturing ecosystem.
- **The Ocean Tech Hub** positions Rhode Island as a leader in the Blue Economy, supporting innovation in marine technology and advanced manufacturing creating pathways for manufacturers to access defense and commercial markets tied to ocean-base industries.
- **SENEDIA** connects manufacturers to defense supply chains and technology opportunities through training, networking and procurement support.

THE RECOMMENDATIONS WILL HELP ELEVATE  
MANUFACTURING ECOSYSTEM PARTNERS

## RECOMMENDATIONS

Four manufacturing industry specific recommendations emerge from the State of Manufacturing Rhode Island Report, 2025 (see below). The recommendations will help elevate manufacturing ecosystem partners to deliver outcomes more efficiently and effectively.

### Support and expand sustainability efforts

- Create, in partnership with industry, additional programs and services focused on reducing waste, energy and other cost driving factors.

### Innovate Talent Pipeline

- Expand proven programs to maintain workforce competitiveness and activate ecosystem partnerships for more supportive wrap around services. Work with employers to hire out of non-traditional workforce programs to broaden workforce pipelines.
- Implement Registered Apprenticeship Programs, leveraging RI resources to reduce implementation time, helping to improve retention and keep talent local.

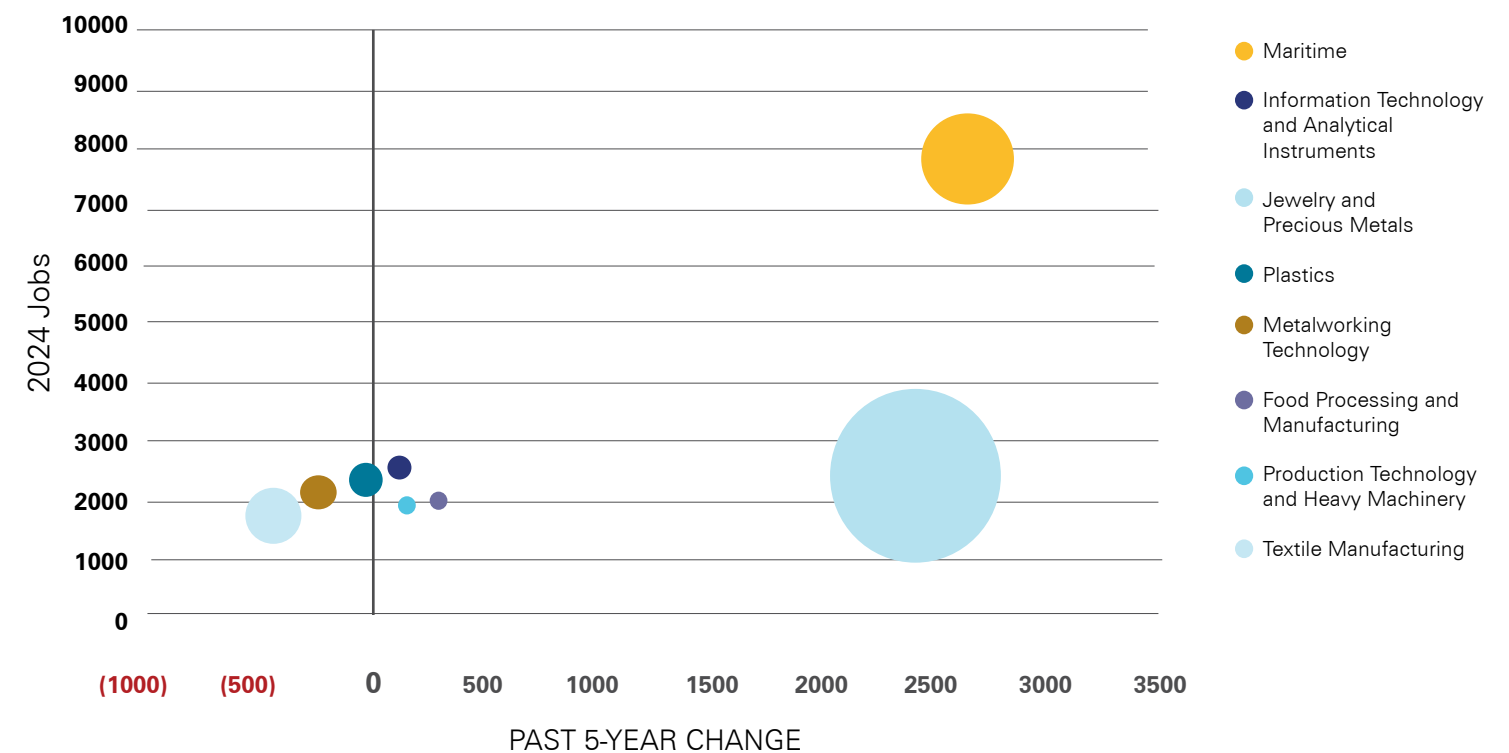
### Accelerate Modernization and Technology Adoption

- Expand proven programs such as Innovation Vouchers, equipment grants and SBIR matching grants to support manufacturing modernization and AI. Establish advanced manufacturing facility for career exploration, adult training and technology demonstration pilots accessible to the entire state.

### Continue to strengthen ecosystem integration

- Develop an integrated manufacturing plan and supply chain collaborative to improve collaboration, close sourcing gaps, and enhance resilience.

## Top 8 Manufacturing Clusters





Polaris exists to strengthen the economy of Rhode Island by empowering businesses and individuals to reach their full potential. To achieve this, Polaris has two complementary entities within it:

**Polaris MEP** is dedicated to helping small and medium-sized manufacturing and emerging technology businesses achieve lasting growth, while creating access to high-growth career pathways for underserved individuals. As a trusted advisor, Polaris MEP delivers hands-on technical assistance and practical guidance to address challenges in sales, innovation, operational efficiency, and workforce development.

**Polaris Tech Bridge** connects innovators with makerspaces, strategic partners, and pathways to government contracts, equipping national defense, dual-use, and ocean technology ventures with the resources to turn ideas into viable products.



315 Iron Horse Way  
Providence, RI 02908  
401-270-8896

[www.polarismep.org](http://www.polarismep.org)