VIEWS OF RANKING MEMBER

I am pleased to share the Joint Economic Committee (JEC) Democratic response to the 2026 Economic Report of the President. The JEC is required by law to submit findings and recommendations in response to the Economic Report of the President (the Report), which is prepared and released each year by the Council of Economic Advisers (CEA). This year's Economic Report was published by the Trump administration in April 2026.

Costs are far too high, and hinder Americans' ability to build a better life for themselves and their children. Yet while President Trump campaigned on a promise to lower costs and usher in a "golden age" for the United States economy, the reality is that his actions have raised everyday costs and made it even harder for families to get by. During the first year of the President's second term, he has: imposed reckless tariffs that continue to drive up prices; created widespread economic uncertainty that has significantly hampered businesses' ability to plan for the future; and signed into law legislation that gave huge tax breaks to corporate special interests and billionaires paid for by exploding the deficit and slashing health coverage and access. The remainder of this introductory letter discusses each of these three areas, which are covered in more detail in the chapters that follow.

Trump's tariffs have raised costs for families, who continue to struggle with the cost of necessities

During his first year back in office, President Trump chose to make inflation worse and single-handedly increase costs for families by deciding to impose reckless tariffs. Experts have found that Trump's tariffs directly increased inflation in 2025, and recent studies have found that price growth would have been on average

30% lower without Trump's tariffs.[1,2] Despite the President's claims that the cost of tariffs would be paid by foreign countries, a Joint Economic Committee – Minority analysis from early 2026 found that the average family paid more than $1,700 in tariff costs between February 2025 and January of 2026.[3] Non-partisan experts have issued similar findings as well.[4,5]

Tariffs have driven up the cost of many key consumer goods and services. A Committee analysis found that in the wake of Trump's tariffs, families spent $310 more on groceries in 2025 than in 2024.[6] Another Committee analysis found that the cost of key baby goods that new parents rely on increased by 24 percent in the two months following Trump's so-called "Liberation Day" tariff announcements on April 2nd.[7]

Families face the impact of these cost increases every day, with a recent poll finding that 70 percent of Americans feel that the cost of living in their area is not very affordable, or not affordable at all, for the average family.[8] Another poll found that 77 percent of registered voters feel that it is harder to achieve a middle-class lifestyle than it was a generation ago.[9] This cost-of-living emergency undermines one of the fundamental goals that all families share: to have the freedom and liberty to work hard to build a life they want. This ongoing crisis is explored further in Chapter 1 of the Minority response.

Trump has created needless economic uncertainty that harms United States' businesses and employment

Looking beyond the direct cost of tariffs to families, the inconsistent and chaotic rollout of the President's trade policies have created immense uncertainty for businesses. Throughout 2025, the administration made more than 100 announcements that increased, decreased, enacted, repealed, or paused tariffs on specific sectors or countries.[10] In addition, United States' courts have paused or rolled back certain tariffs based on legal challenges, injecting even more uncertainty into how businesses plan their operations. And though the Supreme Court ruled earlier this year that the bulk of the President's reciprocal tariffs exacted under the International Emergency Economic Powers Act were illegal, the administration has now moved to enact new 15 percent tariffs on a similarly broad range of goods and countries.[11,12] The added economic uncertainty from the President's on-again-off-again tariff announcements, and the tariffs themselves, have dampened consumer sentiment, raised costs for small businesses, and weakened or reversed job growth in key sectors.[13,14,15]

This unpredictable environment is especially harmful for American manufacturers, the industry that the President claims to be supporting through these high tariffs.[16] Over the course of 2025, the manufacturing sector lost more than 100,000 jobs.[17] The negative impacts on the manufacturing sector will continue for years to come. A Committee analysis that uses evidence from past periods of similar policy uncertainty predicts that tariff disruptions could cost the United States more than $490 billion in manufacturing investments by 2029.[18] Another Committee analysis from last year focused on the ways in which tariff uncertainty and President Trump's foreign policy have harmed American businesses along the United States-Canada border. The report found that from January to October of 2025, the number of passenger vehicle crossings from Canada into the United States dropped by 20 percent compared to the same period in 2024, with every state on the United-Canada border reporting notable drops in tourism.[19] These disruptions from tariff uncertainty are explored further in Chapter 2 of the Minority response.

Trump and Congressional Republicans' "One Big Beautiful Bill" raises costs for working families and hurts the economy while providing windfalls for the very wealthy

In the summer of 2025, Republicans in Congress joined President Trump to pass a partisan budget law that primarily benefits the very wealthy. A Committee analysis found that the combined impacts of the law and the President's tariff policies would leave the typical teacher or fire fighter about $500 worse off, while someone in the top 0.1 percent would get nearly $350,000 in benefits.[20] What's more, the scale of the giveaways to the wealthy are so large that a recent analysis by the nonpartisan Congressional Budget Office found that the bill is expected to add a staggering $4.7 trillion to the federal debt over the next ten years.[21]

The law directly drives up costs, in particular by taking away families' Medicaid coverage, slashing nutrition benefits that help millions put food on the table, cancelling tax cuts that can lower utility bills, and failing to extend the expanded Affordable Care Act tax credits that help millions afford health coverage.[22,23,24,25] The cuts to Medicaid also jeopardize the bipartisan progress that we have made so far to combat the opioid epidemic, as nearly 1 million people receive medication treatment for opioid addiction through Medicaid.[26] The law also cuts home energy programs that can save families up to $1,080 per year in lower energy costs and makes it much more difficult for United States' manufacturers to outcompete China in a range of clean energy industries.[27] These impacts from the law are explored further in Chapter 3 of the Minority response.

There are bipartisan solutions to undo some of the damage done by Trump and lower costs for families

Instead of choosing to make things harder for American families and small businesses, President Trump should work to fulfill his promise to lower costs. To start: roll back all of the reckless tariffs. And in the meantime, Congress should exert its rightful authority over tariff powers and work to lower costs for families; it is encouraging that resolutions to undo specific Trump tariffs have garnered bipartisan support in both the House and Senate in recent months, but families and businesses need real relief.[28,29] While rolling back the tariffs would not cure inflation or fully solve the cost of living emergency, it is a specific policy lever that would help to lower costs for families.

Beyond tariffs, Americans are especially struggling with the cost of housing and health care.[30] On health care, Congressional Republicans should join Democrats to restore the enhanced Affordable Care Act tax credits that make health insurance more affordable. And we should move forward with efforts like expanding Medicare drug price negotiation, addressing unfair facility fees, and increasing access to lower-price generics.[31,32,33] These steps would build on the meaningful bipartisan reforms passed into law in early 2026 that will speed up the approval of more affordable generic drugs, increase price transparency for patients, and stop pharmacy benefit managers (PBMs) from driving up prescription drug prices for seniors.[34] On housing, recent bipartisan efforts to streamline housing construction and boost supply through the ROAD to Housing Act that passed the Senate this year would help improve housing affordability. In addition, further improvements to the Low-Income Housing Tax Credit would make it more affordable to build homes so that working-class families can afford a roof over their heads. While it will take hard work to address the ongoing cost of living emergency, Democrats stand ready to work across the aisle to lower costs for families.

The remainder of this report is a compilation of public reports related to the issues in this letter that have been published by the Joint Economic Committee - Minority during President Trump's second term. The reports are included in their entirety as originally published.

MARGARET WOOD HASSAN
RANKING MEMBER

Chapter 1: Trump's Tariffs Have Raised Prices for Families

As Donald Trump began announcing his intention to impose tariffs in 2024, economists across the political spectrum warned that American businesses and households would lose out from his proposed policies.[35,36] Since President Trump took office and began imposing his tariffs at-will on the American economy, the Joint Economic Committee – Minority has found that his policies have driven up costs for families, forcing them to pay an additional tax on their purchases totaling $1,700 by January 2026. As families struggle to put food on the table and purchase everyday goods, these tariffs have driven up the cost of food and other essential items and have made it increasingly difficult to bring down overall inflation. This chapter includes four Economic Committee – Minority reports that quantify rising prices for families or the cost increases tied to Trump's tariffs.

American Families Have Paid More Than $1,700 Each in Tariff Costs Since Trump Entered Office

Published February 2026

The Joint Economic Committee – Minority estimates that during the last year, the average American family has already paid more than $1,700 in tariff costs, with the costs climbing steadily since the beginning of President Trump's second term. Though the Supreme Court recently struck down key portions of President Trump's tariff agenda, this analysis shows how much this tax on American consumers has already cost American families. President Trump's Administration has also already stated that it will roll out new tariffs to replace those that were recently struck down, which could result in further economic uncertainty and higher costs.[37]

The Joint Economic Committee – Minority combined official data from the U.S. Treasury Department on the amount of tariff revenue collected across the first 10 full months of Trump's second term with independent estimates of the percent of each tariff dollar that is paid by American consumers. The Committee found that American consumers overall paid nearly $160 billion in tariff costs between February and November, an average of nearly $1,200 per family. If monthly tariff costs remain as high as they were in November over the next 12 months, families will pay an average of $2,100 per year due to tariffs.

Month	Total Tariff Costs Paid by Consumers	Tariff Costs Paid per Household
Feb-25	$7.25 Billion	$54.65
Mar-25	$7.89 Billion	$59.52
Apr-25	$13.12 Billion	$98.93
May-25	$17.7 Billion	$133.45
Jun-25	$20.82 Billion	$156.99
Jul-25	$21.54 Billion	$162.47
Aug-25	$22.83 Billion	$172.15
Sep-25	$22.95 Billion	$173.05
Oct-25	$24.12 Billion	$181.92
Nov-25	$23.7 Billion	$178.76
Dec-25	$21.7 Billion	$163.64
Jan-26	$27.74 Billion	$209.22
Total Paid Between Feb 2025 and Jan 2026	**$231.35 Billion**	**$1,744.75**

Source: Original JEC Calculations using monthly reports by the U.S. Department of the Treasury, Bureau of the Fiscal Service, U.S. Census Bureau 2025 projections on population, and estimates of consumer tariff costs from the Congressional Budget Office.

New Parents Are Paying 24 Percent More for Five Common Baby Items Since Trump's Tariffs

Published June 2025

Amid the rising and uncertain tariffs from the Trump Administration, new parents in the United States are already paying higher prices for baby goods. The Joint Economic Committee – Minority analyzed recent price data and found that the cost of five common items bought for new babies increased by 24 percent, or $98. The Committee looked at price changes between April 1st – just before Trump announced the so-called "Liberation Day" tariffs on nearly every country – and June 9th.

In addition, using previously unreleased data on price increases for common baby goods from the popular registry site, Babylist, the Joint Economic Committee – Minority estimates that higher prices following the tariff announcements could force new parents across the United States to spend an additional $875 million in total on key baby goods in 2025. This stems from an average increase of $400 that Babylist found when tracking the prices of a broad list of popular baby goods.

Costs are rising for popular brands of key baby items

Based on available data, the Joint Economic Committee – Minority tracked the prices of the most popular listings on Amazon within five common baby gear categories: a convertible car seat, bassinet/crib, stroller, high chair, and a baby monitor. The total cost of these items increased by 24 percent – or $98 – from April 1st to June 9th.

Over Two Months, Costs Increased by $98 For a New Family Purchasing the Most Popular Item on Amazon for Five Common Categories

Type of Item	Price on June 9th	Price Change Since April 1st	Most Popular Item
Infant and convertible car seat	$139.00	+$43.01	Graco SnugRide Lite LX Infant Car Seat, Studio
Bassinet or crib	$109.98	+$10.09	AirClub Bassinet Bedside Sleeper
Stroller	$99.00	+$20.00	Summer Infant Ingenuity 3Dquickclose CS+ Compact Fold Stroller
High chair	$64.99	+$15.02	Evenflo 4-in-1 Eat & Grow Convertible High Chair, Polyester
Baby monitor	$89.99	+$10.00	HelloBaby No WiFi Baby Monitor

Source: JEC - Minority analysis tracked prices for the best seller items that had data available on Keepa.com or Camelcamelcamel.com within five common baby gear categories tracked by Babylist. Calculations are for the price difference between 4/1/2025 and 6/9/2025.

Following the tariffs, new parents across the country could pay $875 million more for key baby products this year

Analyzing a broader list of 11 categories of baby goods that also include things like bouncers, activity centers, carriers, diaper bags, and other types of car seats, Babylist found that costs increased by an average of $400 between March 10th and June 3rd. If every new parent household in the country has to pay this cost increase, it would result in an additional $875 million overall cost increase in 2025. The table below shows how much more new parents in each state could spend on these 11 goods this year.

Following Tariffs, New Parents in the United States Face an $875 Million Cost Increase for Key Baby Products

State	Total Cost Increase for New Parents
United States	$875.2 million
Alabama	$11.1 million
Alaska	$2.8 million
Arizona	$15.6 million
Arkansas	$8.7 million
California	$100.3 million
Colorado	$19.6 million
Connecticut	$10.7 million
Delaware	$2.4 million
Washington, D.C.	$2.0 million
Florida	$48.5 million
Georgia	$28.3 million
Hawaii	$3.6 million
Idaho	$5.8 million
Illinois	$32.2 million
Indiana	$16.7 million
Iowa	$8.0 million
Kansas	$8.0 million

Kentucky	$10.7 million
Louisiana	$11.9 million
Maine	$2.7 million
Maryland	$18.2 million
Massachusetts	$20.6 million
Michigan	$24.6 million
Minnesota	$15.2 million
Mississippi	$6.2 million
Missouri	$16.1 million
Montana	$2.9 million
Nebraska	$5.1 million
Nevada	$6.3 million
New Hampshire	$3.6 million
New Jersey	$24.8 million
New Mexico	$4.9 million
New York	$48.4 million
North Carolina	$32.4 million
North Dakota	$2.8 million
Ohio	$31.2 million
Oklahoma	$7.8 million
Oregon	$12.0 million
Pennsylvania	$35.9 million
Rhode Island	$2.6 million
South Carolina	$12.3 million
South Dakota	$4.4 million
Tennessee	$20.2 million
Texas	$85.3 million
Utah	$10.3 million
Vermont	$1.6 million
Virginia	$24.5 million
Washington	$23.6 million
West Virginia	$4.9 million
Wisconsin	$14.5 million
Wyoming	$2.2 million

Source: JEC - Minority analysis using data from Babylist and the American Community Survey. Cost increases are calculated using the average $400 increase in the cost of 11 key categories of baby goods that saw price increases and JEC estimates of the number of new parents in 2025. New parents are defined as households with one child who is less than a year old in the American Community Survey for 2023, which is then adjusted for 2025 using recent data on the increase in the number of births.

Families Paid $310 More for Groceries During Trump's First Year in Office

Published January 2026

New calculations from the Joint Economic Committee – Minority find that a typical American family paid $310 more overall for groceries during President Trump's first year in office compared to 2024.

Families are paying these higher prices despite Trump's promise on the campaign trail that "a vote for Trump means your groceries will be cheaper" and his recent claim that "grocery prices are starting to go rapidly down."[38,39] While the President has called the affordability crisis "a hoax," he also recently reversed course on some of his grocery tariffs – underscoring the harm that his tariffs have caused for families' bottom lines.[40,41] For example, Trump initially placed 50 percent tariffs on Brazil – and Americans have paid $76 more for coffee, compared to the same period the year before – and he then lifted those tariffs late last year.[42,43]

The new Committee data below is based on lists of common groceries identified by the U.S. Department of Agriculture for which there are comparable average price data available through the Bureau of Labor Statistics. Weekly quantities of the items were estimated based on data from the Bureau of Economic Analysis' Personal Consumption Expenditures, the U.S. Department of Agriculture, and common packaging sizes at grocery stores. Four items on the Committee list are frequently bought grocery items, but have no comparable Bureau of Labor Statistics data; the Committee approximated these costs by analyzing prices of these items at Walmart.

Grocery List Item	Estimated Quantity Bought per Week	Amount Spent per Household Jan - Dec 2024	Amount Spent per Household Jan - Dec 2025	Total Cost Change
		Dairy		
Whole milk	1.5 gallons	$311.54	$318.05	+$6.51
Cheddar cheese	2 packages of slices	$295.33	$304.63	+$9.30
Butter	2 sticks	$123.51	$123.59	+$0.08
Yogurt	14 oz	$148.35	$139.53	-$8.82
		Non-Dairy Drinks		
Orange juice	1 12-oz can concentrate	$165.90	$180.08	+$14.18

Ground coffee	1 bag	$247.18	$323.24	+$76.06
Meat and Eggs				
Chicken breast	1 package, 2 lbs	$421.99	$433.54	+$11.55
Whole chicken	One whole chicken,	$416.95	$429.46	+$12.51
Bacon	1 package	$265.03	$274.84	+$9.81
Raw ground beef	2 lbs	$595.79	$666.78	+$70.99
Ham	1 package of slices	$292.64	$285.86	-$6.78
Eggs	1 dozen	$165.37	$217.03	+$51.66
Grains				
White bread	1 loaf	$128.50	$121.66	-$6.84
Crackers*	2 boxes	$302.15	$308.32	+$6.17
White rice	1 lb bag	$53.96	$54.92	+$0.96
Pasta	1 box	$73.87	$68.65	-$5.22

Cereal*	1 family-size box	$253.36	$252.71	-$0.65
		Fruits		
Oranges	6 oranges	$168.59	$168.67	+$0.08
Bananas	10 bananas (2 bunches)	$129.65	$135.74	+$6.09
Strawberries	2 cartons	$377.59	$377.47	-$0.12
		Vegetables		
Lettuce	2 8-oz bags	$82.99	$86.03	+$3.04
Tomatoes	4 tomatoes	$135.28	$125.00	-$10.28
Potatoes	8 potatoes	$204.91	$199.70	-$5.21
Corn	2 cans	$133.74	$132.75	-$0.99
Beans	1 lb bag	$86.99	$85.68	-$1.31
		Frozen Foods, Snacks & Sweets		
Cookies	1 package	$411.50	$413.07	+$1.57

Potato chips & salty snacks	2 party-sized bags	$546.92	$569.51	+$22.59
Ice cream	1 carton	$239.88	$248.74	+$8.86
Soda	4 liters	$219.77	$222.20	+$2.43
Candy*	1 family-sized bag (18 oz), spread over 2 weeks	$181.97	$229.18	+$47.21
Frozen dinners*	2 large pizzas	$661.14	$655.49	-$5.65
All Products		$7,842.34	$8,152.12	$309.78

Source: Non-starred product prices are sourced from U.S. Bureau of Labor Statistics Average Price Data. As no data was available for October 2025, the committee estimated prices for October as the midpoint between the September and November prices. Data was also not made available in November 2025 for strawberries, potatoes and oranges, but was made available in December. For these items, the committee estimated October and November data as points along a smoothed trend from September to December data. Data was not available in December 2025 for lettuce. As such, the committee estimated the price for December 2025 based on the trends in price from August to September 2025.

Starred products are common grocery items that are not available from the Bureau of Labor Statistics; these prices are sourced from Walmart products listed online as among the top 10 “best sellers” at time of data collection. Prices are pulled from the price tracking website “Aisle Gopher” with prices averaged over any periods where no data is available.

State-by-State Cost Data: Families Spent Over $1600 More in 2025 Due to Inflation Under Trump

Published January 2026

Updated calculations from the Joint Economic Committee – Minority estimate how much more an average family in every state spent on goods and services in 2025 because of inflation under President Trump. The analysis uses recent data from the Bureau of Economic Analysis on household spending and the most recent Consumer Price Index (CPI) data that tracks inflation through December 2025. CPI estimates the costs that households pay for all purchases and expenses, including housing, transportation, food, clothing, health care, utilities, and other essentials. This analysis uses the same methods that the Joint Economic Committee – Republicans used under the last administration to estimate state-level costs.

Because of the inflation that has occurred since President Trump took office, the average household has paid $1,625 in higher costs. This includes $323 more for housing expenses, such as rent or mortgage payments, and $241 more for transportation costs, such as for a new or used car, car repairs, and gas. Families are paying these higher prices despite President Trump repeatedly pledging on the campaign trail that his administration would "end inflation" and bring down costs for American families.[44] He also falsely claimed just this month that "inflation is stopped" and "prices are down."[45]

State	Overall Average Cost Increase	Average Cost Increase: Housing	Average Cost Increase: Transportation
Alabama	$1,353	$246	$134
Alaska	$2,345	$480	$579
Arizona	$1,569	$188	$251
Arkansas	$924	$115	$317
California	$2,355	$482	$581
Colorado	$1,765	$211	$282
Connecticut	$2,110	$572	$355
Delaware	$1,301	$305	$64
District of Columbia	$1,775	$416	$87
Florida	$1,342	$314	$66
Georgia	$1,178	$276	$58
Hawaii	$2,277	$466	$562
Idaho	$1,437	$172	$230
Illinois	$1,781	$424	$78
Indiana	$1,554	$370	$68
Iowa	$1,303	$159	$114
Kansas	$1,412	$173	$123
Kentucky	$1,342	$244	$133
Louisiana	$1,039	$129	$356
Maine	$1,701	$462	$286
Maryland	$1,326	$311	$65
Massachusetts	$2,221	$603	$374
Michigan	$1,606	$382	$70
Minnesota	$1,608	$197	$140
Mississippi	$1,260	$229	$125
Missouri	$1,426	$175	$124
Montana	$1,486	$178	$238
Nebraska	$1,458	$178	$127
Nevada	$1,565	$187	$250

New Hampshire	$2,100	$570	$354
New Jersey	$2,060	$441	$181
New Mexico	$1,355	$162	$217
New York	$2,024	$433	$178
North Carolina	$1,115	$261	$55
North Dakota	$1,471	$180	$128
Ohio	$1,532	$365	$67
Oklahoma	$961	$120	$329
Oregon	$1,791	$367	$442
Pennsylvania	$1,734	$371	$152
Rhode Island	$1,814	$492	$305
South Carolina	$1,083	$254	$53
South Dakota	$1,468	$180	$128
Tennessee	$1,418	$258	$140
Texas	$1,210	$151	$415
Utah	$1,712	$205	$274
Vermont	$1,794	$487	$302
Virginia	$1,269	$297	$63
Washington	$2,008	$411	$496
West Virginia	$974	$228	$48
Wisconsin	$1,560	$371	$68
Wyoming	$1,528	$183	$244
United States	$1,625	$323	$241

Source: Monthly data from the Bureau of Labor Statistics on the Consumer Price Index both nationally and in each Census Division, state-level data from the Joint Economic Committee – Republicans on average household consumption in each state, and data from the Bureau of Economic Analysis on the share of average consumption by spending category for each Census Division. Housing costs include the price of owning or renting a home, home repairs, home insurance, and hotels. Transportation costs include the price of buying, repairing, and insuring a new or used vehicle, gasoline/motor fuels, vehicle rentals, and transit fares including airline tickets.

Chapter 2: Trump's Tariffs Created Uncertainty that Harms U.S. Businesses

While Chapter 1 focused on the direct ways that tariffs raise costs for families and businesses, the President's tariff policy also created significant uncertainty for businesses throughout the country. This chapter includes two Joint Economic Committee – Minority reports on how this uncertainty and related disruptions harmed the U.S. economy by reducing tourism from Canada and disrupting the ability of manufacturing firms to plan for and invest in the future.

Declining Canadian Tourism is Harming American Businesses in States Along the U.S.-Canada Border

Published December 2025

Since taking office, President Trump has proposed annexing Canada, imposed several rounds of tariffs on Canadian goods (including an additional 10 percent tariff recently imposed on all Canadian imports to retaliate against a TV commercial he did not like), and repeatedly broken off trade talks. This has disrupted diplomatic, economic, and trade relations between the United States and Canada – which in turn has hurt U.S. businesses that depend on visitors from Canada. In 2024, Canadian tourism contributed $20.5 billion to the U.S. economy and supported 140,000 American jobs. The negative impacts of President Trump's tariff policies have been particularly stark in states along the U.S.-Canada border, which have many businesses that rely on short-term visits by Canadians.

"*When our neighbors stay away, our margins disappear and in groceries those margins are vanishingly small to begin with. The friction at the border is no longer just a headline; it is an empty parking lot and a threat to our livelihood*," said Kyle Daley, owner of Soloman's Store in West Stewartstown, NH.

"*Being only eight miles from the border, normally Canadians make up anywhere from 15-25 percent of visitors. Now, I can probably count the number of Canadian visitors on one hand. I'm just trying to plug along and keep my nose above the waterline*," said Elizabeth Guerin, owner of Fiddleheads in Colebrook, NH.

"*These are more than numbers; they represent missed revenue for local businesses, reduced hotel demand, and fewer dollars supporting jobs and investment in our community*," said Shirley Hughes, president and CEO of Visit Fargo-Moorhead in Fargo, ND and Moorhead, MN.

Through data and new testimonials shared directly with the Joint Economic Committee – Minority, this report details reductions in Canadian tourism and the impact on local businesses in every state that borders Canada.

Every State Along the U.S.-Canada Border is Facing Declines in Tourism and Rising Economic Pressure

From January to October 2025, the number of passenger vehicles crossing the U.S.-Canada border declined by nearly 20 percent compared to the same time period in 2024, with some states seeing declines as large as 27 percent. Businesses throughout the region are also reporting fewer tourists, more vacancies, and lower sales.[46]

<u>Alaska</u>

- Border crossings for passenger vehicles from Canada into Alaska were down more than 10 percent for the first ten months of this year compared to 2024.[47]
- Border towns like Haines have seen a drop in Canadian visitors. Ticket sales for one of their major summer events were down 20 percent.[48]
- Visit Anchorage – the city's visitors bureau – reports that hotel stays in May were down five percent.[49]
- Other businesses in Alaska – including Expeditions Alaska, which organizes backpacking and other outdoor trips – have reported softening in Canadian visits and spending.[50] The owner directly attributes these trends to Trump Administration policies:
    - *"It's just a sort of a general sentiment that the current administration seems to be pushing or messaging toward the rest of the world. It just seems adversarial, and people don't want to come spend their money with adversaries,"* said Carl Donohue, owner of Expeditions Alaska in Anchorage, AK.[51]

<u>Idaho</u>

- Border crossings for passenger vehicles from Canada into Idaho were down more than 27 percent for the first ten months of this year, compared to the same period in 2024.[52]
- Bi-national tourism nonprofit International Selkirk Loop, which promotes tourism in the Selkirk Mountains located in Idaho, Washington, and the Canadian province of British Columbia, wrote federal lawmakers in both countries warning of the economic risks to the region, given that it is heavily reliant on cross-border visitors.[53]

- Businesses like Jake's Landing – a gas stop and grocery store in the border town of Porthill that serves almost exclusively Canadian customers – say that visits are down 25 percent[54]:
  - *"During COVID we almost went bankrupt, and the effects have lingered… We got about 50 percent of our customers back last summer, but now we're back down to 25 percent. We can't pay the bills if this continues. I don't even know how to explain how tough these last five years have been,"* said Lars Jacobson, owner of Jake's Landing in Porthill, ID.[55]

<u>Maine</u>

- Border crossings for passenger vehicles from Canada into Maine were down approximately 25 percent for the first ten months of this year compared to 2024.[56]
- In July, Maine's CAT Ferry, which runs between Bar Harbor and Nova Scotia, reported a nearly 20 percent decrease in business during the summer of 2025.[57]
- The Maine Turnpike reports that traffic from Canada is down by 45 percent for cash-paying customers, and by about 20 percent for Maine E-ZPass holders from Canada.[58]
- Maine businesses report fewer Canadians in towns that usually see significant tourism.[59]
  - *"It's like 50 per cent (drop-off) because not too many Canadians…The worst year we've had. We've never had a year like that, even worse than COVID,"* said Moshe Agam, business owner in Old Orchard Beach, ME.[60]
- Ogunquit Playhouse, a regional theatre in Maine, shared with the Joint Economic Committee - Minority that it saw a 44 percent decrease in Canadian visitors during this

year's season – which ran from May to October – compared to 2024.

Michigan

- Border crossings for passenger vehicles from Canada into Michigan were down nearly 11 percent for the first ten months of this year compared to 2024.[61]
- Tourism Economics estimates that Detroit will see a 17.3 percent decrease in international overnight visitor arrivals in 2025 compared to 2024 – with the drop almost exclusively driven (92.1 percent) by a decline in Canadian travelers.[62]
- On average, Canadian visitors spend more than $360 million in Michigan annually, accounting for about 10 percent of the state's total annual tourist revenue.[63]
- Blue Water Area Convention and Visitor Bureau shared with the Joint Economic Committee – Minority that some hotels in the region that track where guests are from have reported, on average, a more than one-third decline in hotel bookings by Canadian guests since the beginning of the year.
- Hotels and restaurants have reported a drop in visitors. The El Moore Lodge manager for example, reported about a 15 percent drop in Canadian travel compared to the year prior.[64,65]
    - *"None of these small businesses asked for this. You know, we're just sort of rolling with the punches. Everyone's seeing a slow down. Everyone's getting the emails saying 'we're sorry, but we're not spending our money here right now,'"* said Michel Soucisse, manager at El Moore in Detroit, MI.[66]

<u>Minnesota</u>

- Border crossings for passenger vehicles from Canada into Minnesota were down nearly 19 percent for the first ten months of this year compared to 2024.[67]
- Tourism Economics estimates that Minneapolis will see a 14.5 percent decrease in international overnight visitor arrivals in 2025 compared to 2024 – with the drop being almost exclusively driven (88.3 percent) by a decline in Canadian travelers.[68]
- Cook County Chamber of Commerce, which collects its own data on border crossings, reported about a 30 percent decrease in passenger vehicles traveling to the United States from Canada in May compared to 2024.[69]
- Hotels in northwestern Minnesota – including some along the Canadian border – experienced a 3.7 percent drop in bookings during the spring and summer, while those in northeastern Minnesota saw a 1.1 percent drop.[70]
- During the spring and summer, 51 percent of tourism businesses surveyed by Explore Minnesota reported a decline in business activity compared to the year prior. Additionally, as of September, 70 percent of tourism businesses surveyed reported a somewhat or significant decrease in Canadian business relative to 2024.[71]
- Many businesses that sit right on the border rely heavily on Canadian visitors – 25 percent of Cook County's Java Moose coffeehouse visitors come from Canada – putting them at risk.[72]
    - *"[My Canadian neighbors are emailing me] just saying, 'Hey, we're not coming down right now' ... 'We're just gonna wait some things out.' And they're very kind about it. They're very respectful to us and to our business, and they know that it's not, and we know also, that it's not personally us or the North Shore,"*

said Sarah Jorgenson-Hallberg, owner of Java Moose in Grand Marias, MN.[73]

- A travel and tourism group covering both Moorhead, Minnesota and Fargo, North Dakota emphasized the consequences of declining tourism to the Joint Economic Committee – Minority.
    - *"At the Pembina Port of Entry, arrivals through September this year totaled 289,671, compared to 457,054 in the same period last year, a 36.6% year-over-year decrease. That downward trend continued throughout the third quarter, with crossings down 35.3% in September, 44.4% in August, and 37.7% in July. The broader picture reflects a similar challenge. Combined Minnesota and North Dakota border entries decreased from 2.5 million to 2 million over the same timeframe, a 19% drop. These are more than numbers; they represent missed revenue for local businesses, reduced hotel demand, and fewer dollars supporting jobs and investment in our community,"* said Shirley Hughes, president and CEO of Visit Fargo-Moorhead in Fargo, ND and Moorhead, MN.

<u>Montana</u>

- Border crossings for passenger vehicles from Canada into Montana were down more than 19 percent for the first ten months of this year compared to 2024.[74]
- In 2024, Canadian tourists made up nearly 80 percent of all international visitors to Montana and contributed over $170 million to Montana's economy.[75]
- Some businesses reported a 25 percent decrease in Canadian travel and a 44 percent decrease in Canadian credit card spending compared to 2024.[76]
    - Discover Kalispell, a tourist marketing organization, reported numerous Canadian reservation cancellations.

One hotel reported a reservation canceled by a Canadian sports team, which included 70 rooms and a 200-person dinner, a $38,000 revenue loss.[77] *"We need signals from both governments that cross border friendships and our economic partners matter, and without that no amount of marketing is going to help that right now,"* said Diane Medler, executive director of Discover Kalispell in Kalispell, MT.[78]

<u>New Hampshire</u>

- New Hampshire state officials reported a 30 percent decrease in Canadian visitors as of this summer.[79]
- Retailers in the Mount Washington Valley region saw a significant drop in Canadian visitors, with one hotel owner in North Conway reporting 30 percent vacancies during some summer weekends that traditionally sell out.[80]
- Mount Washington State Park has also seen a "noticeable decline in Canadian visitation," according to the park supervisor.[81]
- During the first five months of 2025, reservations by Canadians at state-run campgrounds were down 71 percent compared to the same period the year prior.[82] This trend also extends to private campgrounds like Wakeda.[83]
    - *"It panned out pretty much as we expected ... We still had some of our Canadian friends with us, but it was a dramatic decrease over typical years,"* said Amanda Ellen, owner of Wakeda Campground in Exeter, NH.[84]
- An estimated 75 to 80 percent fewer Canadians attended Laconia Motorcycle Week compared to previous years. The nine-day event typically contributes nearly $100 million to New Hampshire's economy.[85]
- Fiddleheads – an artisan shop and gallery that has been in Colebrook for 18 years – is also feeling the decline in

Canadian tourists, sharing with the Joint Economic Committee – Minority:

  - *“Being only eight miles from the border, normally Canadians make up anywhere from 15-25 percent of visitors. Now, I can probably count the number of Canadian visitors on one hand. I’m just trying to plug along and keep my nose above the waterline,”* said Elizabeth Guerin, owner of Fiddleheads in Colebrook, NH.

- Solomon's Store, a 103-year-old family-run grocery store in northern New Hampshire, shared with the Joint Economic Committee - Minority that it had long relied on Canadian traffic until things began to change this summer:
  - *"We spoke with Canadian customers who told us point-blank that they were hesitant to cross due to the current political tension. The joy of the 'shopping day trip' has been replaced by anxiety over border enforcement and tariffs. Additionally, we are situated on the primary corridor for families traveling from Quebec to the Maine coast, and the usual parade of vacationers heading to Old Orchard Beach simply didn't show up this year. When our neighbors stay away, our margins disappear and in groceries those margins are vanishingly small to begin with. The friction at the border is no longer just a headline; it is an empty parking lot and a threat to our livelihood. We are all eager to see normality and civility restored in our long productive relationship with our neighbors to the north,"* said Kyle Daley, owner of Soloman's Store in West Stewartstown, NH.

<u>New York</u>

- Border crossings for passenger vehicles from Canada into New York were down more than 17 percent for the first ten months of this year compared to 2024.[86]
- Tourism Economics estimates that Buffalo will see a 14.8 percent decrease in international overnight visitor arrivals in 2025 compared to 2024 – with the drop almost exclusively driven (79.2 percent) by a decline in Canadian travelers.[87]
- In June, the North Country Chamber of Commerce, serving northern New York, reported that 83 percent of businesses experienced a decrease in Canadian customers – with 35 percent reducing staffing levels to meet the decline. Seventy percent of businesses blamed the political climate and tariff policies for this drastic decrease.[88]
- The Regional Office of Sustainable Tourism (ROOST), a destination marketing organization for Lake Placid and Essex County, Hamilton County, Saranac Lake, and Tupper Lake stated that hotel revenue was down 8 percent and restaurant sales were down 20 to 30 percent as of this summer.[89]
    - *"I think some of that is just general economic anxiety related to tariff threats, both [from] Americans and our Canadian visitors,"* said Dan Kelleher, CEO of ROOST in Lake Placid, NY.[90]
- Typically, 70 percent of daily golfers at the Bluff Point Golf Resort – located only 35 minutes from downtown Montreal – are Canadian.[91]
    - *"It's been a dramatic drop. It's very rare that we see someone pull in to play golf that's coming from Canada,"* said Paul Dame, owner of Bluff Point Golf Resort in Plattsburgh, NY.[92]

- A New York vineyard shared with the Joint Economic Committee – Minority that its business is being affected.
    - *"The drop in visits from Canadian tourists has had a noticeable impact on our bottom line. With Canadians making up about 10% of our business, fewer cross-border travelers mean fewer tastings, tours, and wine sales — a ripple effect that touches our entire operation, underscoring how important cross-border tourism is to our business model,"* said Scott Osborn, president and co-owner of Fox Run Vineyards in Penn Yan, NY.

<u>North Dakota</u>

- Border crossings for passenger vehicles from Canada into North Dakota were down more than 25 percent for the first ten months of this year compared to 2024.[93]
- In 2018, Canadian tourists contributed $120 million in sales to North Dakota's economy.[94]
- The North Dakota Department of Commerce estimates that Canadian visitors spent roughly $14.4 million less at North Dakota businesses in the first six months of this year compared to last year.[95]
- North Dakota hotel occupancy from the first six months of 2025 was down 4.5 percent compared to the first six months of 2024. Visitors to Theodore Roosevelt National Park in North Dakota were also down in June of 2025 compared to June 2024.[96]
- West Acres – a large regional shopping attraction – shared its experience with the Joint Economic Committee – Minority.
    - *"Canadian visitors have historically been an important part of West Acres' customer base, peaking at nearly 10% of our shoppers during the summer months and tapering off into the winter. Their per-visit spend tends to be higher than*

> *average, meaning that even modest declines in visitation can create a noticeable impact across our retail and restaurant tenants. Exchange rates have always influenced cross-border travel, but nothing like what we've seen in recent years. When trade policies or travel conditions become less favorable, those effects are felt locally, and particularly among the independent businesses that make up roughly one-third of our tenant mix. Canadian shoppers remain a valued part of our regional economy, and we're focused on what we can control - providing a vibrant, welcoming experience that hopefully makes their visit worth the trip,"* said Alissa Adams, COO of West Acres in Fargo, ND.

<u>Vermont</u>

- Border crossings for passenger vehicles from Canada into Vermont were down more than 28 percent for the first ten months of this year compared to 2024.[97]
- Canadians make up 5 percent of visitors to Vermont and contribute $150 million to Vermont's economy each year.[98]
- Between January and September of this year, credit card spending by Canadians in Vermont was down 49 percent compared to this time period in 2024.[99]
- Steve Wright, President and General Manager of Jay Peak Resort, testified to the Senate Finance Committee in June that Canadians were canceling golf trips daily.[100]
    - Mr. Wright updated the Joint Economic Committee – Minority in December to say that the golf business ended up being 20 percent lower than normal during the 2025 season.

- Local businesses like Parker Pie, a pizza restaurant, have reported sales declining by as much as 20 percent, which they attribute to fewer Canadian tourists.[101]
- Canadians have only accounted for 4 percent of the Old Stagecoach Inn's web traffic this year, after accounting for 27 percent in 2024.[102] Owner Christa Bowdish shared with the Joint Economic Committee – Minority that she's been forced to lay off employees and reduce hours to overcome the fact that this year has been "a belt-tightening year instead of the growth year [they] had planned."
    - *"It's not just the tariffs. It's not something that will be solved as soon as we conclude trade negotiations. This is long-lasting damage to a relationship and emotional damage takes time to heal. While people aren't visiting Vermont, they'll be finding new places to visit, making new memories, building new family traditions, and we will not recapture all of that,"* said Christa Bowdish, owner of the Old Stagecoach Inn in Waterbury, VT.

Washington

- Border crossings for passenger vehicles from Canada into Washington were down more than 24 percent for the first ten months of this year compared to 2024.[103]
- Tourism Economics estimates that Seattle will see a 26.9 percent decrease in international overnight visitor arrivals in 2025 compared to 2024 – with the drop being almost exclusively driven (99.1 percent) by a decline in Canadian travelers.[104]
- Spokane saw 33 percent fewer visitors in March 2025 than in March 2024.[105]
- Ridership between Vancouver Island and Seattle on the Seattle-based ferry service Clipper Navigation is down 30

percent so far this year. The company has been forced to lay off a quarter of its workforce as a result.[106]

- Of the 60 businesses surveyed in Bellingham – a city roughly 25 miles from the Canadian border – more than half reported losses due to a decline in cross-border travel. This is forcing business owners like Sasha Lysikov, owner of the children's boutique Minted Method, to cut hours for employees.[107]
    - *"I didn't want to just suddenly close on our customers without giving them a heads-up ... We are really reliant on the Canadian traffic to come down here,"* said Sasha Lysikov, owner of Minted Method in Bellingham, WA.[108]
- The Bellingham Chamber of Commerce stated that the city has experienced a drop in visits, overnight stays, and spending by Canadian travelers – a downturn which has been devastating for many businesses.[109]
- On the importance of cross-border shopping for local businesses: *"It's integrated into the business model, it's integrated into the customer base,"* said Guy Occhiogross, president of the Bellingham Chamber of Commerce in Bellingham, WA.[110]
- The organizers of an annual seafood and maritime festival in Whatcom County, Washington noted to the Joint Economic Committee - Minority that the area has seen a drastic decline in Canadian traffic.
    - *"Since March of this year, we have not only seen Canadian traffic drop drastically, but we have also seen a drop in our number of attendees at our festival this year in late September. We knew that after March, we could not rely on our Canadian business because of fear at the border and lack of understanding of what is happening with tariffs*

> *and Canada drawing a strong line of promoting Canada first,"* said Kevin Coleman, executive director of SeaFeast in Bellingham, WA.

Uncertainty From Trump's Tariffs Derails U.S. Manufacturing in Both the Short and Long Term

Published August 2025

New Committee Estimates Find that Continued Uncertainty Could Reduce Manufacturing Investments by an Average of 13 percent Per Year, or by More Than $490 Billion by 2029

Strengthening domestic manufacturing is critical to U.S. national security, outcompeting China, and securing the future of our economy. While the Trump administration has stated that its policies will create growth in the U.S. manufacturing sector, its approach is having the opposite effect – depriving manufacturers of the certainty that they need to invest in building new factories and creating jobs in the United States.[111] Since April – when President Trump announced the so-called "Liberation Day" tariffs on nearly every country – the U.S. has lost 37,000 manufacturing jobs, and **hiring in the manufacturing sector has dropped to its lowest level in nearly a decade**. In addition, many experts have noted that in and of itself, the uncertainty created by the administration so far could significantly damage the broader economy long-term.[112]

Economic experts have also discussed the parallels that the uncertainty surrounding the Trump administration's approach to trade has to the recent experience of the United Kingdom. In the 2016 Brexit referendum, U.K. voters chose to leave the European Union, which led to heightened trade policy uncertainty, with questions swirling around the process, timeline, and terms of the withdrawal. This had long-term consequences for growth: Economists have estimated that, in the years following the Brexit vote, the U.K.'s real Gross Domestic Product (GDP) was 4 to 8 percent lower than it would have otherwise been, primarily due to businesses pulling back on investment amidst high uncertainty.[113,114]

Based on both U.S. business investment projections and economic analyses of the U.K. in the aftermath of Brexit, the Joint Economic Committee – Minority calculates that a similarly prolonged period of uncertainty in the U.S. **could result in an average of 13 percent less manufacturing investment per year, amounting to approximately $490 billion in foregone investment by 2029**. Although businesses have received additional clarity on reciprocal tariff rates in recent days, uncertainty over outstanding negotiations is likely to continue to delay long-term investments and pricing decisions.[115]

Furthermore, even if the uncertainty about the U.S. economy were to end tomorrow, evidence suggests that the uncertainty that businesses have already faced in recent months would still have long-term consequences for the manufacturing sector. The Committee finds that **the economic uncertainty experienced just in April could result in a 1 percent reduction in investment on average per year by 2029, or approximately $42.2 billion**.

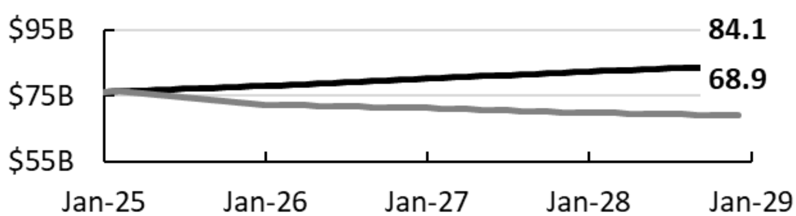
Prolonged economic uncertainty could reduce manufacturing investments in the U.S. by $490 billion by 2029; if uncertainty ended tomorrow, the U.S. could still lose more than $42 billion in manufacturing investments

As the Wall Street Journal wrote earlier this year, "What happens when a developed economy throws up barriers with its biggest trade partners? Brexit offers a few clues... One clear red flag for the U.S. from Britain's Brexit experience is the costs of uncertainty…The U.S. could experience something similar if firms are unsure how long these tariffs will last. The longer the uncertainty, the worse the damage."[116]

The Joint Economic Committee – Minority finds that if economic uncertainty in the U.S. continues as it has over recent months, it could reduce manufacturing investment growth by an average of **13 percent per year, amounting to approximately $490 billion in foregone manufacturing investment by 2029.** The Committee's calculations are based on long-term projections of nonresidential fixed investment growth released by the Congressional Budget Office (CBO) in January 2025 and research from the Bank of England on the impact that prolonged trade policy uncertainty – spurred by the June 2016 Brexit decision – had on businesses' investment in the U.K. from 2016 to 2021.[117,118]

Prolonged Uncertainty Would Undermine the Future of U.S. Manufacturing

Projected monthly U.S. nonresidential fixed investment growth (manufacturing), Jan. 2025–Dec. 2028, Billions (2025 Dollars)



Source: JEC - Minority estimates based on data from the Congressional Budget Office, the Bureau of Economic Analysis, and research from the Bank of England. A trend line is used to reflect the general pattern in the annual data over time.

There is also reason to believe that the impact could be even greater, given that U.S. manufacturers are arguably facing a broader range of possible policy and economic outcomes than U.K. businesses did throughout the Brexit process. In either case, the U.S. could see a major contraction in investment at a moment when experts have highlighted the need to increase investment to meet the economic and national security challenges posed by China's growing dominance in advanced manufacturing.[119,120,121]

Even if the Trump administration finalized trade policy for the rest of the administration tomorrow and ended all economic uncertainty, the turmoil of recent months could still harm long-term manufacturing innovation and growth in the U.S. Based on the Congressional Budget Office's projections and Federal Reserve research on the impact of short uncertainty shocks, the Joint Economic Committee - Minority estimates that the uncertainty that businesses faced in April alone could **result in a 1 percent reduction in investment on average per year, or approximately $42.2 billion in foregone manufacturing investment by 2029.[122]**

Economic uncertainty has already led to layoffs, business closures, and a decline in investments in the manufacturing sector

As independent research has shown, businesses are less likely to make long-term investments when they face high uncertainty about future policies and economic conditions.[123] For manufacturers, decisions to expand production – which often entail major, irreversible investments in equipment and new facilities that typically take years to complete – require an especially high degree of confidence that these expenses will pay off.[124,125] This barrier, along with other factors, makes manufacturing the sector most likely to see its growth affected by trade policy uncertainty, as noted recently by analysts at Goldman Sachs.[126]

Since April, the Trump administration has made nearly 100 different tariff policy decisions (including threats, delays, and reversals), which has caused economic uncertainty to skyrocket.[127] Amongst other measures, the Economic Policy Uncertainty Index surged to the highest level ever observed in April. This uncertainty is putting stress on the manufacturing sector. In December 2024, surveyed manufacturing firms expected capital expenditures to increase by 5.2 percent in 2025; as of May 2025, they expected them to shrink by 1.3 percent.[128] The National Association of Manufacturers' 2025 Q2 Outlook Survey, released at the end of May, found that **optimism among manufacturers had dropped to its lowest level since the height of the COVID pandemic.[129]** Most respondents named trade uncertainty as their top concern, followed by higher input costs. Other surveys released in recent months show a similar pattern, including:

- The Federal Reserve's Beige Book survey[130]
- The Institute for Supply Management (ISM)'s Purchasing Managers' Index (PMI)[131]
- Manufacturing surveys conducted by the Philadelphia, Kansas City, Dallas, New York, and Richmond regional Federal Reserve Banks[132,133,134,135,136]

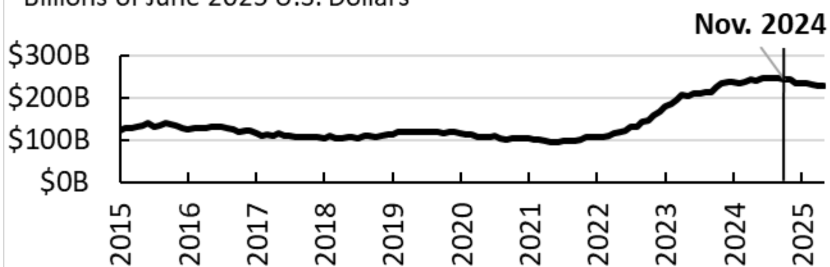
In addition to putting a chill on investment and future growth in the sector, tariffs and economic uncertainty have already led to the loss of U.S. manufacturing jobs. **The number of U.S. manufacturing jobs fell by 37,000 across May, June, and July.[137]** In May, hiring in the manufacturing sector also dropped to its lowest level since 2016.[138] Manufacturers have cited economic uncertainty as a motivation for increasing layoffs.[139]

Some manufacturers have already closed or declared bankruptcy due to the economic uncertainty and tariff-related price increases for key inputs. For example, a Michigan clockmaker that had operated for nearly 100 years recently announced that it would be going out of business due to both the direct and indirect effects of tariffs.[140] Powin Energy, an Oregon-based manufacturer of battery storage systems, filed for bankruptcy in June after struggling to find alternative suppliers for key inputs.[141]

Manufacturing investments overall have declined this year. An analysis by Bloomberg found that 220 of the Fortune 500 companies reduced capital spending in the first quarter, with companies in the industrial sector especially reining in spending due to uncertainty and higher costs.[142] Between 2021 and early 2023, construction spending in the manufacturing sector more than doubled, a surge which reflected the significant impact of programs from the Inflation Reduction Act, the bipartisan infrastructure law, and the CHIPS and Science Act.[143] Since last November, however, this trend has begun to reverse, driven by businesses' uncertainty about the continuation of many of these key programs, the direct impact of Trump's tariffs, and uncertainty about the tariffs, among other factors.

Since November, Manufacturing Construction Investment Has Been in Decline

Total Manufacturing Construction Investment, Jan 2015-June 2025, Billions of June 2025 U.S. Dollars



Source: FRED Total Manufacturing Construction Spending, monthly at a seasonally adjusted, annualized rate using FRED Producer Price Index of Materials and Components for Construction

Chapter 3: Trump and Congressional Republicans' "One Big Beautiful Bill" Hurts Working Families While Providing Windfalls for the Very Wealthiest

This chapter includes three Joint Economic Committee – Minority reports on how federal spending cuts and tax policy changes made by the "One Big Beautiful Bill Act," now Public Law No. 119-21, provide substantial financial benefits to wealthy Americans while threatening efforts to combat the opioid epidemic and bolster U.S. economic and energy security – resulting in higher costs for average Americans.

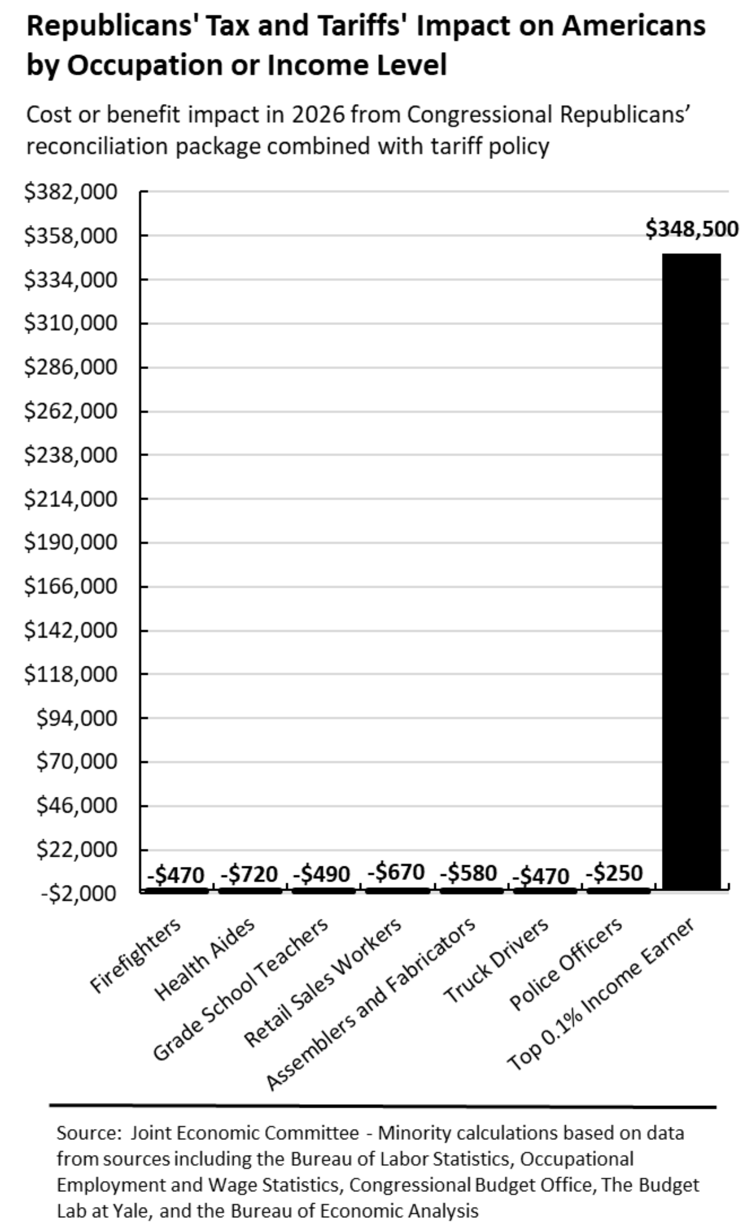
Tax and Tariff Impacts by Occupation and Income

Published June 2025

The Joint Economic Committee – Minority calculated how the combined effects of President Trump's tariffs and Congressional Republicans' budget bill would affect the finances of a typical firefighter, teacher, or truck driver, as well as people in other jobs. This new Committee data incorporates estimates from several nonpartisan analyses, including the Congressional Budget Office's analysis on how the bill impacts workers at different income levels.

Committee estimates show that under Republican leaders' tax and tariff plans, **a typical teacher will lose nearly $500** next year, while **firefighters and truck drivers will lose about $470**. Meanwhile, the typical earner at the very top of the income ladder will see a windfall, with someone in the top 0.1% **getting a net tax break of nearly $350,000 in 2026, even after accounting for the impact of tariffs**. In addition, the Congressional Budget

Office estimates that middle-class Americans will be even worse off under the tax plans in the coming years.



Highest-Income Individuals Gain Tens of Thousands from the Combined Tax and Tariff Plans		
Extremely High-Income Individual	**Minimum Income in 2026**	**Estimated Total Benefit of Tax Policy**
Top 1% Income Earner	**$968,620**	**$32,450**
Top 0.1% Income	**$4,240,190**	**$348,500**

Source: Joint Economic Committee - Minority calculations based on data from sources including the Yale Budget Lab and the Penn-Wharton Budget Model. All values are for 2026 but reported in 2025 dollars

Middle-Income Workers Lose Hundreds from the Combined Tax and Tariff Plans		
Job Title	**Estimated Pre-Tax Income in 2026**	**Estimated Total Cost of Taxes and Tariffs**
Assemblers and Fabricators	**$52,500**	**-$580**
Counselors, Social Workers, and Other Community and Social Service Specialists	**$68,030**	**-$460**
Grade School Teachers	**$72,540**	**-$490**
Firefighters	**$70,460**	**-$470**
Food Processing	**$48,140**	**-$540**
Home Health Aides and Related Health Workers	**$45,190**	**-$720**
Heavy and Tractor-Trailer Truck Drivers	**$69,980**	**-$470**
Maids and Housekeeping Cleaners	**$44,230**	**-$710**
Police Officers	**$90,800**	**-$250**
Retail Sales Workers	**$42,040**	**-$670**
Sheet Metal Workers	**$74,040**	**-$500**

Source: Joint Economic Committee - Minority calculations based on data from sources including the Bureau of Labor Statistics, Occupational Employment and Wage Statistics, Congressional Budget Office, The Budget Lab at Yale, and the Bureau of Economic Analysis

Note: "Grade School Teachers" include elementary and middle school teachers. "Home Health Aides and Related Health Workers" include Home health and personal care aides, as well as nursing assistants, orderlies, and psychiatric

Recent Clean Energy Programs Lower Costs for Families and Are Vital to U.S. Manufacturing, Jobs, and Energy Security

Published May 2025

Tax cuts and investments through the Inflation Reduction Act, signed into law in 2022, are key to outcompeting China and lowering energy costs for families.

In this report, new data from the Joint Economic Committee – Minority details the amount that families in each state can save on their energy costs because of tax cuts in the Inflation Reduction Act. In addition, this report details how the law has spurred new jobs and manufacturing facilities in states across the country – including in industries that produce materials critical to our national security.

This report comes as Congressional Republicans advance a budget bill that would derail growing efforts to strengthen U.S. energy security. Their planned rollback of Inflation Reduction Act energy provisions would harm businesses in states across the country, threaten our national security, and raise energy costs for everyday Americans.

Investments are key to strengthening U.S. energy security and outcompeting China

The Inflation Reduction Act's investments are vital to the future of the U.S. economy and national security, especially because the Chinese government is heavily investing in its own clean energy sector.

In recent years, China has used policies such as state and government-backed low-interest loans for companies in certain industries to try to dominate several parts of the fast-growing global clean energy sector.[144,145,146] For example, the Chinese government invested approximately $230 billion in its electric vehicle (EV) sector between 2009 and 2023.[147] This level of investment has helped Chinese manufacturers rapidly take market share from the U.S. and other economies and has supported technological innovation and R&D.[148] This general pattern of Chinese firms using state investment to undercut competitors in the U.S. is also found in the markets for solar cells and EV batteries – despite the fact that the underlying technologies were originally pioneered by researchers at U.S. labs and universities.[149,150,151]

The Inflation Reduction Act took on the economic and national security challenges posed by China's unfair industrial subsidies and the decades-long decline in U.S. manufacturing. The law includes several tax cuts that can help U.S. companies scale up production and regain market share from China in a number of clean energy industries. It also incentivizes – and directly invests in – ways to reduce our reliance on China for the raw or intermediate materials that power clean energy technologies, often known as critical minerals and materials.[152,153,154]

These materials are imperative for U.S. national security. For example, neodymium-iron-boron (NdFeB) permanent magnets are a critical component in not only EV motors and wind turbines – but also in defense technologies like submarines and radar systems.[155,156] As of 2021, the U.S. imported nearly 100 percent of the NdFeB magnets we use, with 75 percent of supply sourced from China.[157] However, in part through the support of tax cuts in the Inflation Reduction Act, MP Materials recently began trial production of NdFeB magnets at a new facility in Texas – a key step toward the goal of establishing a fully U.S.-based supply chain for these critical inputs.[158,159]

Leveling the playing field for the U.S. clean energy sector also strengthens U.S. energy security. Energy demand throughout the United States is projected to increase dramatically in the coming years, in part so that the U.S. has the infrastructure necessary to lead in the development and deployment of artificial intelligence (AI).[160,161] Major U.S. utilities and other experts have emphasized that renewable power sources and clean energy tax cuts are critical to meeting this demand.[162,163] Inflation Reduction Act tax cuts help bring more new energy projects online and reduce stress on the energy grid – lowering the risk of energy shortages, cutting costs for households and businesses, and underpinning the U.S. effort to win the global AI race.[164]

Tax cuts and investments are strengthening private sector growth and bringing good-paying jobs to states across the country

In addition to addressing U.S. economic, energy, and security challenges, the Inflation Reduction Act is spurring private sector growth and opportunity. Since the law was signed, more than 2,034 new clean energy, industrial, and manufacturing facilities have opened across the country.[165] The law's tax cuts and loans have helped spur more than $289 billion in privately-led investment across the U.S. clean energy supply chain, and another $524 billion in future investment has already been announced.[166,167] Within the first two years of the law being signed, clean energy-related investments – including everything from manufacturing facilities to factory equipment and consumer purchases like EVs and heat pumps – accounted for more than half of total private investment growth in the United States.[168]

These investments have helped to create more than 340,000 manufacturing jobs across the country and are poised to create even more in the coming years.[169] These opportunities are also reaching areas of the country that saw fewer benefits from the economic growth of recent decades, including rural communities and communities that lost manufacturing or fossil fuel-related jobs.[170,171,172] This is by design, as the Inflation Reduction Act provides additional incentives to companies that make investments in these areas to make sure that job opportunities are spread out across the country.

Since the Inflation Reduction Act was passed, companies that received support from the law have opened or are expanding manufacturing facilities across the country. Some examples include:

- A General Motors battery plant near Lordstown, Ohio, which employs 2,200 people as of 2024;[173]
- A Tesla EV manufacturing complex in Austin, Texas, which now employs more than 20,000 people;[174] and
- A Panasonic battery plant in De Soto, Kansas, which will employ at least 4,000 people.[175]

The table below shows the top 20 states sorted by the number of new jobs announced since the passage of the Inflation Reduction Act at manufacturing, utility electricity, and industrial facilities eligible to receive tax credits through the law. In total across all 50 states, more than 980,000 new jobs have been announced at facilities that can receive tax cuts through the law.

The Inflation Reduction Act Has Spurred the Creation of Thousands of New Private Sector Jobs in the U.S. – Top 20 States	
State	**Announced Private Sector Jobs**
Texas	169,732
California	66,897
Georgia	60,557
Michigan	48,800
Nevada	42,910
Arizona	39,818
South Carolina	39,740
Tennessee	39,707
Ohio	39,404
North Carolina	39,384
Indiana	37,484
Illinois	32,836
Louisiana	29,671
New York	29,185
Kentucky	28,033
Virginia	21,642
Florida	19,728
New Mexico	15,240
Utah	14,288
Colorado	14,245

Source: Rhodium and MIT-CEEPR's Clean Investment Monitor.

Note: This total includes announced jobs associated with the construction and operation of manufacturing, utility electricity, and industrial facilities eligible for Inflation Reduction Act incentives. The total includes jobs associated with both completed facilities and those announced but not yet completed.

These announced jobs are now in jeopardy, in part because of uncertainty around President Trump and Congressional Republicans' plans to rollback energy tax cuts in the Inflation Reduction Act. In just the first three months of this year, nearly $8 billion in private sector clean energy investments and 16 new factories were cancelled, scaled back, or closed amidst rising uncertainty about the economy and potential policy changes.[176] The final section of the report further details the risks posed by cutting Inflation Reduction Act energy programs.

Tax cuts for home energy improvements and vehicle upgrades lower costs for Americans

Tax cuts in the Inflation Reduction Act can lower the upfront cost of energy-saving home appliances and retrofits, which can save people even more money down the line thanks to lower energy use.

The Inflation Reduction Act expanded and extended existing federal tax credits for at-home clean energy equipment including solar panels and battery storage, and for energy-efficient improvements like better insulation or new windows and doors – which can all lower families' energy bills.[177,178] These residential tax cuts include the:

- Residential Clean Energy Credit, which can save people 30 percent off of the cost of purchasing and installing solar panels, battery storage, geothermal heat pumps, and more.[179]
- Energy Efficient Home Improvement Credit, which can save people 30 percent off of the cost of qualifying energy-saving home upgrades and appliances, up to $3,200 a year.[180]

More than 3.4 million American families claimed the Residential Clean Energy and Energy Efficient Home Improvement tax credits on their 2023 tax return.[181] The average family claiming the Residential Clean Energy Credit saved $5,000, while Energy Efficient Home Improvement Credit savings averaged $880 per family.

The Inflation Reduction Act also expanded the available tax cuts for those purchasing a clean vehicle.[182] These tax cuts support people who want to buy a new or used clean vehicle, and businesses purchasing a new clean vehicle – as well as the installation of EV chargers. The new clean vehicle credit also supports automakers here in America, because vehicles cannot qualify if they have battery components sourced from China.[183] By helping more Americans purchase an EV, these tax cuts can considerably lower drivers' costs over time. Studies have shown that the long-term costs of owning a clean vehicle can be significantly lower than the costs associated with a comparable gas-powered vehicle.[184,185] For a new compact sedan, for example, an EV owner can expect to save more than $10,000 over seven years compared to an owner of a comparable gas-powered vehicle.[186]

These tax cuts can help Americans significantly lower their monthly and annual energy costs; they can also facilitate home upgrades that increase home values and protect against power outages.[187] **Below are original estimates by Joint Economic Committee – Minority staff of how much households in each state can save annually on energy costs** through the tax cuts for home and appliance upgrades supported by the Inflation Reduction Act. Annual cost savings estimates were calculated using 2023 average monthly energy cost data for each state from the U.S. Energy Information Administration (EIA) and the range of energy cost savings (30–70 percent) associated with relevant home retrofits in prior research.[188,189,190] **Our new data show that a typical U.S. household can save approximately $460–$1,080 on their annual energy costs.**

Estimated Annual Household Energy Cost Savings Through the Inflation Reduction Act

State	Average Annual Cost Savings
Alabama	$586–1366
Alaska	$496–1158
Arizona	$534–1247
Arkansas	$463–1079
California	$521–1216
Colorado	$341–795
Connecticut	$730–1703
Delaware	$497–1160
District of Columbia	$374–872
Florida	$606–1414
Georgia	$510–1190
Hawaii	$768–1791
Idaho	$384–896
Illinois	$378–883
Indiana	$471–1100
Iowa	$405–946
Kansas	$424–990
Kentucky	$453–1057
Louisiana	$515–1201
Maine	$553–1290
Maryland	$534–1247
Massachusetts	$596–1391
Michigan	$409–954
Minnesota	$399–931
Mississippi	$551–1286

Missouri	$454–1059
Montana	$394–920
Nebraska	$401–937
Nevada	$524–1223
New Hampshire	$608–1418
New Jersey	$408–951
New Mexico	$328–766
New York	$453–1057
North Carolina	$460–1073
North Dakota	$424–989
Ohio	$449–1047
Oklahoma	$465–1084
Oregon	$424–988
Pennsylvania	$515–1202
Rhode Island	$539–1258
South Carolina	$504–1175
South Dakota	$455–1061
Tennessee	$487–1136
Texas	$597–1393
Utah	$306–714
Vermont	$422–984
Virginia	$510–1190
Washington	$386–902
West Virginia	$499–1164
Wisconsin	$400–933
Wyoming	$357–834

Source: JEC calculations. Annual cost savings estimates were calculated using 2023 average monthly energy cost data for each state from EIA and the range of energy cost savings (30-70%) associated with relevant home retrofits in prior research.

Proposed roll backs would come at a steep cost to the U.S. economy, national security, and American families

President Trump and Congressional Republicans' proposed cuts to Inflation Reduction Act energy programs would derail much-needed efforts to bolster U.S. energy security and lower household energy costs.

Researchers estimate that **cuts to the Advanced Manufacturing Credit and other Inflation Reduction Act clean energy and manufacturing tax cuts would lead private companies to spend $80 billion on solar and battery manufacturing in other countries instead of in the U.S. Losing out on this manufacturing capacity would also cost the U.S approximately $50 billion each year in lost exports**.[191] A separate independent study estimates that rollbacks of key clean energy policies would raise energy costs for the U.S. industrial sector by $8-14 billion in 2030 – making it harder for businesses to start and expand here in the U.S.[192] Cutting support for domestic manufacturing would especially undermine efforts to reduce reliance on Chinese suppliers for critical minerals and other technology inputs, increasing China's ability to disrupt the U.S. economy and our military operations.[193] Republicans' current plan would also end home energy and efficiency tax cuts available to households, making it harder for them to afford energy-saving upgrades – **which can help a typical family save up to $1,080 each year.**

Medicaid – Especially Medicaid Expansion – Fuels Bipartisan Progress in Combating the Opioid Epidemic

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With support from bipartisan legislation signed into law by President Trump in 2018, Medicaid covers medication treatment for opioid use disorder, the gold standard for opioid addiction treatment.[194]

This report from the Joint Economic Committee – Minority lays out how Medicaid plays a key role in ensuring that Americans have access to opioid addiction treatment. New analysis from the Joint Economic Committee – Minority, based on data shared with the Committee, shows that about 1 million people receive medication treatment for opioid use disorder through Medicaid. Additionally, the analysis of the data shows that more than 60 percent of these individuals access this treatment through Medicaid Expansion.

Just as the United States starts to see a decline in overdose-related deaths, cuts to Medicaid would jeopardize this progress.[195,196]

Through Medicaid, about one million people receive the gold standard of treatment for opioid addiction

- New data shared with the Joint Economic Committee - Minority, as detailed in the table below, show that **roughly 1 million individuals were able to receive medication treatment for opioid use disorder through Medicaid** in 2022. The true number for that year was likely larger, as data limitations prevented researchers from including figures for New York or Illinois.
- A brief from the Brookings Institution recently reported that 1.8 million people received treatment for opioid use

disorder through Medicaid in 2021.[197] In addition to including Medicaid enrollees receiving medication treatment for opioid use disorder, this number includes those receiving other forms of opioid use disorder treatment and those who received naloxone to reverse an opioid overdose, which are not included in the new 2022 data shared with the Joint Economic Committee – Minority, among other differences.

- Medication treatment is the gold standard for treatment of opioid use disorder. Medications – such as methadone, buprenorphine, and naltrexone – provide patients with relief from withdrawal symptoms and allow the body to function normally without the use of illicit opioids.[198] The medications can be used for months, years, or a full lifetime to help ensure that individuals can stay in recovery and not return to opioid use.
    - The American Medical Association and others recognize these medications as the first-order treatment for patients with opioid use disorder. Physician groups across the country are advocating for increased access to this treatment.
- Health insurance like Medicaid is the key to accessing these highly effective medications, as treatment costs can be unaffordable for people who are uninsured.[199,200]
- According to research, people treated for addiction with medication and therapy experience improved employment outcomes, in addition to improved health outcomes and enhanced likelihood of continuing treatment.[201]
    - A recent study found that Medicaid enrollees who received buprenorphine (a form of medication treatment for opioid use disorder) were more likely to become employed, had shorter job searches, and

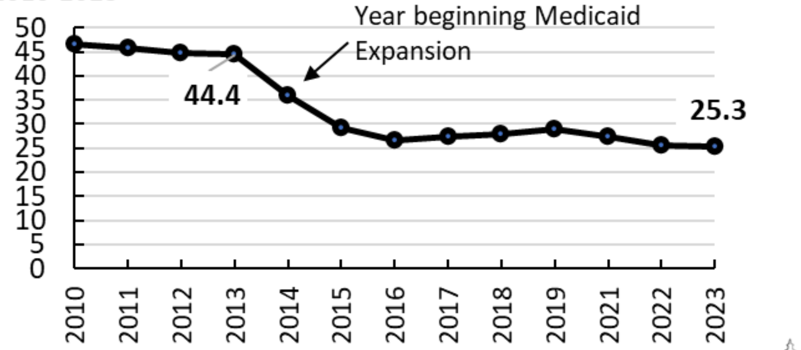
earned more than those not initially receiving treatment.[202]

Medicaid Expansion is how most Medicaid enrollees get medication treatment for opioid use disorder

- The Affordable Care Act provided states with the option to extend Medicaid's availability to more Americans – called Medicaid Expansion. The federal government helps states that adopt this program broaden Medicaid coverage to include adults and families with incomes at or below 138 percent of the poverty level.[203,204,205] For an individual, this includes those who earn an income at or below $21,597, while the threshold for a family of four is $44,367.[206]
- Since 2014, 40 states and Washington, D.C. have adopted Medicaid Expansion, driving the number of people nationwide without health insurance to a record low.[207] As shown in the graph below, the number of uninsured individuals ages 0 to 64 dropped by nearly 20 million people since states began providing Medicaid Expansion coverage.[208]

After States Adopted Medicaid Expansion, The Uninsured Rate Plunged

Uninsured people ages 0 to 64 in the United States, in millions, 2010-2023



Source: KFF analysis of American Community Survey 1-year estimates.

- New data shared with the Joint Economic Committee – Minority show that Medicaid Expansion is ensuring that hundreds of thousands of people can access medication treatment for opioid use disorder. This new data is provided in the table below.
    - **JEC – Minority calculations show that about 60 percent of Medicaid enrollees who receive medication treatment for opioid use disorder can only do so through Medicaid Expansion.**
    - In several states – including New Hampshire, Louisiana, Montana, Idaho, and Kentucky –70 percent or more of Medicaid enrollees who receive medication treatment for opioid use disorder are only eligible for Medicaid coverage – including coverage for addiction treatment – because of Medicaid Expansion.

Research shows that prescriptions for opioid use disorder treatment increased after Medicaid Expansion

- A 2019 analysis by the Medicaid and CHIP Payment and Access Commission (MACPAC) found that prescriptions through Medicaid to treat opioid use disorder significantly increased from 2013 to 2017 – the period following the initial set of states enacting Medicaid Expansion in 2014 – with nearly three times more Medicaid prescriptions for buprenorphine.[209]
- An Urban Institute study showed that between 2010 and 2018, there was a significant increase in certain prescribed medications to treat opioid use disorder, particularly in Medicaid Expansion states between 2013 and 2018.[210]
- Research has also found that the prescription of medications to treat substance use disorder in outpatient settings increased by 43 percent in Medicaid Expansion states compared to non-Expansion states.[211]

Bipartisan laws have further increased access to opioid use disorder treatment

- In 2018, Republicans and Democrats in Congress passed – and President Trump signed into law – the *Substance Use Disorder Prevention that Promotes Opioid Recovery and Treatment for Patients and Communities* (*SUPPORT*) *Act*.[212]
    - This landmark law invested in a multipronged effort to combat the opioid epidemic, enabling states across the country to create an addiction care infrastructure and provide prevention, treatment, and recovery resources.
- Senator Maggie Hassan (D-NH) and Senator Lisa Murkowski's (R-AK) bipartisan *Mainstreaming Addiction*

Treatment Act became law in 2022, eliminating an outdated requirement, the 'x-waiver,' that previously limited the number of medical practitioners who could prescribe life-saving medication treatment for opioid use disorder.[213,214]

- The bipartisan *Extending Access to Addiction Treatment Act*, which was sponsored by Senator Hassan and Senator Marsha Blackburn (R-TN) and became law in 2024, permanently extended the 2018 SUPPORT Act policy that requires states to cover all types of FDA-approved medications to treat opioid use disorder under their Medicaid programs.[215]
- Members of Congress are now working to update and reauthorize the bipartisan *SUPPORT Act* as the opioid and fentanyl epidemic continues to evolve.[216]
    - Advocates and policymakers have called for targeted efforts to increase the number of people who get medication treatment for opioid use disorder, especially in rural areas – as there are many more people dealing with addiction who could likely benefit from this treatment.[217,218]

While these bipartisan efforts have led to progress, cuts to Medicaid could stop this progress in its tracks

- Cuts to Medicaid would jeopardize U.S. progress in combating the opioid and fentanyl epidemic, cutting thousands of people off from medication treatment for opioid use disorder – at a time in which the U.S. recently saw the first drop in overdose-related deaths since 2018.[219]
    - The Centers for Disease Control and Prevention recently announced provisional estimates showing a nearly 24 percent drop in overdose-related deaths between 2023 and 2024, and the lowest number of

overdose deaths since June 2020.[220] The agency notes that increased access to medication and evidence-based treatment has contributed to this decline.[221]

- Individuals covered by Medicaid Expansion are particularly at risk if Medicaid is cut. Approximately 3 million individuals – including thousands who are dealing with addiction – could all lose their health care if “trigger” laws go into effect to end Medicaid Expansion.[222] “Trigger” laws were included in some states’ Medicaid Expansion programs and require these states to fully and immediately cut off the Medicaid Expansion population from their health care if federal funding drops below a specific level.[223]
- In eight states – Arkansas, Illinois, Indiana, Montana, New Hampshire, North Carolina, Utah, and Virginia – if the share of federal funding for Medicaid Expansion falls below 90 percent, the state will automatically terminate Medicaid Expansion. Arizona’s Medicaid Expansion would end if the federal share fell below 80 percent.
- Based on new data, the Joint Economic Committee – Minority estimates that, for seven of these states where such data are available, 95,000 people receiving medication treatment for opioid use disorder would automatically lose access to such treatment, if federal funding fell below these thresholds.
- As noted in the table below, this count does not include Illinois and North Carolina, and so is likely a significant undercount in the number of people who could immediately lose their access to such treatment.
- In an additional three states — New Mexico, Iowa, and Idaho — if the share of federal funding for Medicaid Expansion falls below 90 percent, current state laws

provide the legislature the option to fully cut off health care for the Medicaid Expansion population.[224]

  - Across these three states, a drop in federal funding for Medicaid Expansion could lead to an additional 15,000 people losing access to medication treatment for opioid use disorder.

- Taken together, at least 110,000 people could lose access to medication treatment for opioid use disorder, if funding for Medicaid Expansion were cut for "trigger" states alone.
- Federal cuts to Medicaid would likely also lead non-"trigger" states to drop their Medicaid Expansion programs altogether, given that lost federal funding would lead states to take on larger portions of the program costs with much smaller budgets. This puts coverage at risk for hundreds of thousands of additional individuals who receive medication treatment for opioid use disorder through Medicaid Expansion.

Federal Medicaid Cuts Could Lead Thousands of People with Opioid Use Disorder to Lose Access to Medication Treatment in Trigger Law States

States with Trigger Laws	Medicaid Expansion Beneficiaries with Opioid Use Disorder Receiving Medication Treatment
Arkansas	536
Illinois	N/A
Indiana	27,679
Montana	3,726
New Hampshire	7,609
North Carolina	N/A
Utah	7,704
Virginia	25,467
Arizona	22,165
New Mexico	9,931
Iowa	2,545
Idaho	2,802
Total	**110,164**

Source: States listed according to Georgetown McCourt School of Public Policy Center for Children and Families' analysis identifying states with trigger laws. Numbers are based on JEC - Minority analysis of MACPAC and Acumen LLC, 2024, Analysis of Transformed Medicaid Statistical Information System (T-MSIS) data as reported by states.

Note: Numbers are based on 2022 data pulled from table below. Illinois was excluded from base analysis due to data limitations. North Carolina adopted Medicaid Expansion in 2023. As such, 2022 data for North Carolina are unavailable.

Nearly 1 Million Receive Medications for Opioid Use Disorder Treatment Through Medicaid and Medicaid Expansion			
State	**Medicaid Beneficiaries with Opioid Use Disorder (OUD) Receiving Medication Treatment**	**Medicaid Expansion Beneficiaries with OUD Receiving Medication Treatment**	**Percent of Medicaid Beneficiaries with OUD Receiving Medication Treatment Through Expansion**
Total	996,711	598,675	60%
Alabama	7,403	N/A	N/A
Alaska	5,529	3,577	65%
Arizona	31,619	22,165	70%
Arkansas	2,454	536	22%
California	76,153	51,298	67%
Colorado	18,177	14,876	82%
Connecticut	26,148	19,934	76%
Delaware	8,566	5,715	67%
District of Columbia	2,202	1,160	53%
Florida	20,280	N/A	N/A
Georgia	4,911	N/A	N/A
Hawaii	1,857	1,376	74%
Idaho	4,017	2,802	70%
Indiana	42,118	27,679	66%
Iowa	3,686	2,545	69%
Kansas	1,162	N/A	N/A
Kentucky	60,771	44,238	73%
Louisiana	23,116	18,265	79%
Maine	14,793	8,468	57%
Maryland	47,974	28,959	60%
Massachusetts	50,637	28,992	57%
Michigan	37,440	23,347	62%
Minnesota	15,581	9,864	63%
Mississippi	2,080	N/A	N/A
Missouri	10,873	4,480	41%
Montana	4,954	3,726	75%
Nebraska	1,408	821	58%
Nevada	6,923	5,285	76%
New Hampshire	9,838	7,609	77%
New Jersey	35,550	25,908	73%
New Mexico	16,618	9,931	60%
North Carolina	21,935	N/A	N/A
North Dakota	1,868	1,299	70%
Ohio	82,079	51,416	63%
Oklahoma	8,020	4,945	62%
Oregon	22,456	20,120	90%
Pennsylvania	84,445	56,074	66%
Rhode Island	7,767	4,462	57%
South Carolina	7,371	N/A	N/A

South Dakota	418	N/A	N/A
Tennessee	19,673	N/A	N/A
Texas	5,866	N/A	N/A
Utah	10,776	7,704	71%
Vermont	8,428	6,197	74%
Virginia	36,286	25,467	70%
Washington	44,266	31,787	72%
West Virginia	26,752	19,288	72%
Wisconsin	19,540	N/A	N/A
Wyoming	247	N/A	N/A

Notes: OUD is opioid use disorder. MOUD is medications for opioid use disorder. MOUD included in this analysis are methadone, buprenorphine, and extended-release injectable naltrexone. The figure shows use of MOUD among individuals age 18–64 who were ever enrolled as a full-benefit, non-dually eligible Medicaid beneficiary in fiscal year (FY) 2022 as reported by states in the Transformed Medicaid Statistical Information System (T-MSIS). The first column reflects the number of Medicaid beneficiaries with OUD as identified using diagnosis and procedure codes in T-MSIS claims, who had at least one claim for MOUD. The second column reflects the number of Medicaid beneficiaries with OUD, as identified using diagnosis and procedure codes in T-MSIS claims, who were enrolled in the new adult group and who had at least one claim for MOUD. The third column reflects the percentage of total Medicaid beneficiaries who had at least one claim for MOUD, who were enrolled in Medicaid in the new adult group, which the JEC - Minority calculated using data from the first two columns. New adult group includes individuals who were made newly eligible for Medicaid by the Medicaid expansion under the Patient Protection and Affordable Care Act (ACA, P.L. 111-148, as amended). N/A indicates that a state had not expanded Medicaid to the new adult group as of FY 2022. Illinois and New York were excluded due to data limitations.

Source: JEC - Minority analysis of MACPAC and Acumen LLC, 2024, Analysis of Transformed Medicaid Statistical Information System (T-MSIS) data as reported by states.

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