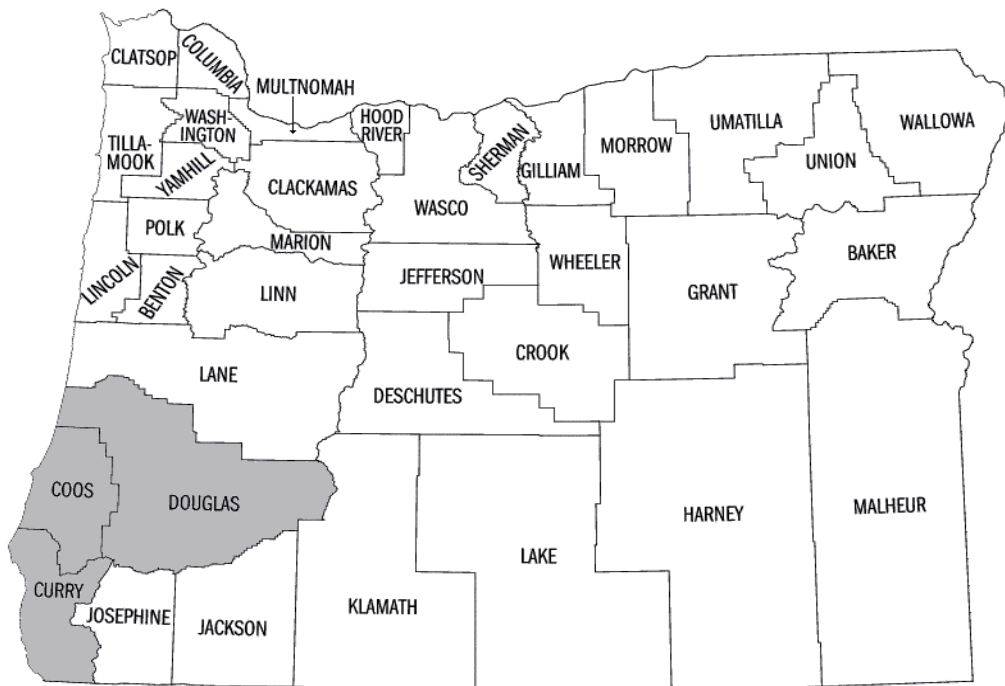


OREGON
ECONOMIC & COMMUNITY DEVELOPMENT DEPARTMENT

**Regional Analysis
Coos, Curry and Douglas Counties**

April 2008



Michael Anderson, Economist
(503) 229-6179

Brian Evans, Economist
(503) 229-5224

Innovation and Economic Strategies Division
One World Trade Center
121 S.W. Salmon
Portland, OR 97204

Executive Summary

This report evaluates the employment base, competitive industries and projected growth opportunities in the Oregon Economic and Community Development Department's (OECD) regional service area made up of Coos, Curry and Douglas counties. The following are key features and trends that were identified by the data and analysis in this report:

Employment and Wages

- Employment in the region accounts for 3.8% of private sector employment in Oregon.
- Douglas County accounts for almost 60% of regional employment.
- Average private sector wages in the region (\$28,553) are 24.3% lower than the state average of \$37,703.
- Coos County has the highest employment growth (4.0%) and the lowest population growth in the region.
- Employment growth in each county of the region was lower than the state average (5.9%).

Interstate Business Moves

- The region was a net importer of business establishments between 1990 and 2004.
- The number of establishments the region gained was more than two times what the region lost over the time period.
- The region had a net gain of business from California, Washington, Idaho, Alaska and Texas.
- The region had a net loss of business establishments to Missouri, Montana, Minnesota, Mississippi, North Carolina, Ohio, Oklahoma, Rhode Island and Georgia.
- Service Industries (Business Services & Engineering, Accounting, Research, Management & Related Services) accounted for the largest share of net moves to the region.

Population and Age Demographics

- Population growth in each of the counties in the region was below the state average of 3.0% between 2004 and 2006.
- The region has a larger share of retirement age workers (19.0%) than the state average of 17.0%.
- In most sectors of the region, the share of retirement age workers is between 2% and 11% above the state average.
- 5 industries have a lower proportion of retirement age workers than the state averages for those sectors: Construction, Information, Leisure & Hospitality, Manufacturing and Retail Trade.

Competitive Industries

- The region has 41 industries that met at least one of the competitiveness criteria¹.
- Of the 41 industries, 30 are projected to grow by 2016.
- Seventeen of the competitive industries are projected to grow faster than the regional average, 40% of which also have average wages above the regional averages.
- Eighteen of the competitive industries have average wages above regional averages.

¹ Competitive criteria used in this report are as follows: location quotient greater than or equal to 1.25; relative average wage greater than 100%; and differential employment growth rate greater than or equal to 20%.

- Seven industries exceed the regional averages in both average wages AND employment growth: Securities, Commodity Contracts, Investments, Couriers & Messengers, Warehousing & Storage, Nonmetallic Mineral Product Manufacturing, Nonstore Retailers, Fabricated Metal Product Manufacturing and Transportation Equipment Manufacturing.

Introduction

The purpose of this report is to evaluate the employment base, competitive industries and projected growth opportunities in the Oregon Economic and Community Development Department's (OECDD) regional service area made up Coos, Curry and Douglas counties. The framework for the report provides data and analysis to help identify emerging issues and possible areas for strategic economic development initiatives. The report is composed of four sections. Section one details the data sources and methodology for this report. Section two provides an overview of the regional economy by analyzing employment, wages, population growth, business relocation, and age demographics by industry. Section three provides a framework to identify the industries in which the region may have a competitive advantage in developing or expanding regional industry specialization. Section four analyzes the employment and occupational growth opportunities that are projected for the industries identified in section three. Detailed tables of business relocation data are provided in the two appendices.

Section 1: Data Sources and Methodology

This report is based on analysis of statistical data from Oregon Employment Department, Bureau of Labor Statistics, Portland State University's Population Research Center, and Walls and Associate's National Establishment Time Series (NETS) database.

The methodology for this report uses a series of indicators to provide a framework for evaluating the competitive strengths and growth opportunities of the regional economy. The following indicators are used for this report.

Regional Indicators

Section two begins with an overview of the regional economy focusing on private sector business establishments, employment, and average wages to determine the geographic distribution and characteristics of employment in the region. This data is followed by recent employment and population growth trends to evaluate the region's strength in creating employment opportunities, and attracting or retaining people in the area.

The next set of indicators in this section examines regional business relocation patterns. One way to evaluate the economic strength of a region is to see if it is able to attract businesses from outside the area. This set of indicators looks at net gain or loss of business establishments by industry and also details the states where business relocations are most likely to occur.

The final set of indicators in this section analyzes of the share of retirement age workers in the region by sector. The impending retirement of the baby-boomer generation will create challenges and opportunities for regional economies. Worker replacement needs may create new employment opportunities, but regions may struggle to find qualified workers.

Competitive Industry Indicators

Section three develops three sets of indicators to identify industries that have a competitive advantage in the region. We examine employment concentrations, relative wage levels, and differential growth rates within each region to identify industries that appear stronger in the region than elsewhere in the state. This section of the report uses the same competitiveness indicators as Joe Cortright's "Oregon Industry Clusters" report commissioned by OECDD. More information about the each of the three competitiveness indicators is listed below:

One characteristic of a competitive industry is the concentration of industry employment in a region, which is measured using location quotients. Location quotient is a ratio of the employment concentration of a given industry in a region compared to that industry's employment concentration in the state as a whole. Location quotients above one indicate that an industry's share of employment in the region is greater than the industry's share of employment statewide. For this study we use a location quotient threshold value of 1.25 to determine if an industry has a competitive advantage in the region. A location quotient of 1.25 means that an industry has a 25 percent greater employment concentration in the region than that found in Oregon as a whole.

Another competitive indicator is relative average wage. Regions where industry average wages are significantly above the state average are one sign that the industry has a competitive advantage in the region. Firms generally pay higher wages to higher skilled workers, as a reflection of their higher productivity, greater level of human capital, or to compensate them for the maintenance of firm specific skills. To measure relative average wage we compare industry average annual pay levels for the region and for Oregon in 2006. The threshold for this indicator is 100%, which indicates that the average annual pay in the region is equal to or greater than the state average for that industry.

Differential employment growth rate is the final indicator that was used to determine regional industry competitiveness. If a region's industry consistently outperforms their peers statewide over a period of time this may indicate the existence of a competitive advantage for that industry. To measure differential growth, we examine five-year growth rates for regional and statewide industry employment. The threshold for the relative growth indicator is 20%, which means employment in the industry grew at least 20% faster in the region than it did in the state as a whole.

Employment Growth Projections

Section four looks at the employment growth projections that are associated with each of the regionally competitive industries identified in section three. Growth projections are a good way to determine the industries where employment growth is projected to occur. Current projections cover the period from 2006 to 2016.

Caveats & Limitations

The competitive industries indicators and the employment projections are based on different datasets. The competitive industries indicators are based on private, covered (subject to unemployment insurance) employment while the employment projections are based on non-farm covered and uncovered employment. As a result the employment figures in Table 7 do not match the employment totals in Tables 8 although they are typically very similar.

Section 2: Overview of the Regional Economy

Business Establishments, Employment and Wages

- The region made up of Coos, Curry and Douglas counties accounts for 3.8% of Oregon’s private sector employment.
- The average wage in the region is 24.3% lower than the state’s private sector average wage.
- Coos and Douglas counties account for almost 90% of the region’s private sector employment.
- Douglas County has the region’s highest average wage and largest share of regional employment.
- The highest average wage in the region is 19.5% lower than the state average.

Table 1: Private Sector Establishments, Employment and Wages, 2006

Area	Est.	Employment	Average Wage	% of Region Employment	% of Region Avg. Wage
Coos	1,840	17,430	\$26,229	32.1%	91.9%
Curry	806	5,679	\$25,904	10.5%	90.7%
Douglas	2,962	31,110	\$30,338	57.4%	106.3%
Region	5,608	54,219	\$28,553	100.0%	100.0%
Oregon	122,629	1,434,040	\$37,703	N/A	N/A

Source: OECD analysis based on QCEW data from the Oregon Employment Department and BLS

Employment and Population Growth

- Employment and population growth in each county of the region is lower than the state average.
- Coos County has the highest employment growth and lowest population growth rate in the region.
- Employment and population growth in the region counties are in the bottom half of all counties (36).

Table 2: Percentage Change in Employment and Population, 2004-2006

Area	Employment	Population	Emp. Growth Rank	Pop. Growth Rate
Coos	4.0%	0.3%	20	27
Curry	2.0%	1.0%	27	21
Douglas	2.4%	1.4%	26	19
Oregon	5.9%	3.0%	N/A	N/A

Source: Oregon Employment Department and Portland State University

Interstate Business Moves

- The region was a net importer of business establishment between 1990 and 2004.
- While Missouri was the region’s top stealer state, the region only had a net lost of 3 establishments to the state.

- The region had a net gain of 80 establishments from California, the top feeder state for the region.
- More than 75% of net moves into the region are from California.

Table 3. Top Feeder States (1990-2004)

State	Net Est. Gain
California	80
Washington	6
Idaho	4
Alaska	3
Texas	3

Table 4. Top Stealer States (1990-2004)

State	Net Est. Loss
Missouri	-3
Montana	-2
Minnesota	-1
Mississippi	-1
North Carolina	-1
Ohio	-1
Oklahoma	-1
Rhode Island	-1
Georgia	-1

Source: OECD analysis using National Establishment Time Series Database (Wall and Associates)

- Roughly one-third of net moves out of the region were from establishments in service industries.
- Agriculture Services is the only industry that experienced no business relocations out of the region.

Table 5: Largest Net Establishment Gains by Industry (1990-2004)

Industry	Move In	Move Out	Net Change
Business Services	22	10	12
Engineering, Accounting, Research, Management & Related Svcs	16	5	11
Agricultural Services	9	0	9
Construction - Special Trade Contractors	12	4	8
Personal Services	11	3	8
Wholesale Trade - Durable Goods	10	3	7
Miscellaneous Retail	14	10	4
Building Construction - General Contractors & Operative Builders	11	7	4
All	193	89	104

Source: OECD analysis using National Establishment Time Series Database (Wall and Associates)

- The region's largest net loss occurred in two industries: Legal Services and Hotel, Rooming Houses, Camps & Other Lodging Places.
- Out of 41 industries in the region, only 2 experienced a net loss of establishments.

Table 6: Largest Net Establishment Losses by Industry (1990-2004)

Industry	Move In	Move Out	Net Change
Hotels, Rooming Houses, Camps, and Other Lodging Places	1	2	-1
Legal Services	1	2	-1
All	193	89	104

Source: OECD analysis using National Establishment Time Series Database (Wall and Associates)

Age Demographics by Industry

- The number of retirement age workers is highest in Educational & Health Services.
- The highest percentage of retirement age workers (29.9%) occurs in the Others Services industry.
- The Information industry has the fewest number of retirement age workers and the fewest number of workers.
- Leisure & Hospitality has the lowest percentage of retirement age workers (12.9%).

Table 7: Age Demographics by Industry, 2006

Sector	Statewide			Region		
	Age 14-99	Age 55+	Pct.	Age 14-99*	Age 55+*	Pct.*
Construction	100,444	13,498	13.4%	4,018	600	14.9%
Educational and Health Services	205,443	41,376	20.1%	7,376	1,676	22.7%
Financial Activities	89,086	16,137	18.1%	2,724	606	22.2%
Information	34,853	4,823	13.8%	988	146	14.8%
Leisure and Hospitality	164,490	17,096	10.4%	7,319	941	12.9%
Manufacturing	203,499	33,994	16.7%	8,090	1,452	17.9%
Natural Resources and Mining	48,201	10,118	21.0%	3,021	623	20.6%
Other Services	61,801	13,418	21.7%	2,084	623	29.9%
Professional and Business Services	98,476	17,325	17.6%	2,552	579	22.7%
Retail Trade	203,439	30,352	14.9%	8,216	1,420	17.3%
Trade, Transportation, and Utilities	340,956	56,083	16.4%	12,293	2,376	19.3%
Transportation, and Utilities	52,954	11,311	21.4%	2,794	718	25.7%
Wholesale Trade	84,563	14,420	17.1%	1,283	238	18.6%
All	1,347,249	223,868	16.6%	50,465	9,622	19.1%

Source: Oregon Employment Department, Local Employment Dynamics

* Some sector totals are affected by confidentially restrictions due to the small size of sector employment in the some of the counties that make up the region

Section 3: Regional Competitive Industries

- Of the 87 reportable (non-confidential data) 3-digit NAICS industries in the region, 37 met at least one of the competitiveness criteria.
- Employment in these industries accounts for 61.2% of private employment in the region.
- Four industries met all three competitive criteria (Mining, Except Oil & Gas, Nonstore Retailers, Scenic & Sightseeing Transportation and Accommodation).
- 30% of the region's competitive industries meet at least 2 of the competitiveness criteria.
- The Forestry & Logging and Wood Product Manufacturing industries have the highest employment concentration in the region.
- The region's employment concentration in Forestry & Logging is almost six times the concentration of the state as a whole.

Table 8: Industries Meeting At least One of the Competitiveness Criteria (sorted by employment)*

NAICS	NAICS Description	Est.	Employment	Average Wage	L.Q.	Relative Wage	Differential Growth Rate	# of Criteria Met
523	Securities, Commodity Contracts, Investments	30	85	\$76,745	0.48	80.1%	32.3%	*
221	Utilities	23	252	\$70,456	1.39	117.1%	10.5%	**
114	Fishing, Hunting And Trapping	34	33	\$45,029	3.32	141.1%	-48.4%	**
321	Wood Product Manufacturing	66	4,892	\$41,755	4.00	122.5%	-11.1%	**
237	Heavy And Civil Engineering Construction	77	938	\$41,667	2.15	95.4%	85.3%	**
492	Couriers And Messengers	10	49	\$39,112	0.19	136.9%		*
212	Mining, Except Oil And Gas	18	96	\$38,087	1.27	104.9%	90.7%	***
425	Electronic Markets And Agents And Brokers	34	99	\$37,635	0.21	61.3%	96.0%	*
113	Forestry And Logging	244	1,647	\$37,098	5.71	104.9%	-9.2%	**
524	Insurance Carriers And Related Activities	104	437	\$35,616	0.46	80.8%	24.1%	*
493	Warehousing And Storage	8	10	\$34,952	0.04	109.3%		*
327	Nonmetallic Mineral Product Manufacturing	7	31	\$34,813	0.15	93.5%	42.9%	*
454	Nonstore Retailers	23	377	\$34,727	1.38	116.4%	435.1%	***
484	Truck Transportation	146	1,277	\$33,876	1.73	97.8%	11.5%	*
337	Furniture And Related Product Manufacturing	17	268	\$33,604	0.84	115.6%	0.7%	*
332	Fabricated Metal Product Manufacturing	33	338	\$32,582	0.54	92.8%	78.1%	*
336	Transportation Equipment Manufacturing	15	801	\$31,778	1.16	82.7%	85.5%	*
115	Agriculture And Forestry Support Activities	44	568	\$31,666	1.55	161.4%	-17.5%	**
443	Electronics And Appliance Stores	39	231	\$27,018	0.95	93.3%	117.3%	*
236	Construction Of Buildings	290	1,078	\$26,952	1.14	66.6%	50.9%	*
446	Health And Personal Care Stores	44	357	\$25,803	1.24	106.9%	-19.2%	*
444	Building Material And Garden Supply Stores	70	779	\$25,666	1.31	97.4%	13.1%	*
532	Rental And Leasing Services	47	266	\$24,077	0.93	103.1%	19.2%	*
487	Scenic And Sightseeing Transportation	8	45	\$22,779	3.22	108.7%	76.4%	***
112	Animal Production	16	107	\$22,363	0.91	98.8%	51.8%	*
452	General Merchandise Stores	32	1,686	\$20,971	1.20	110.0%	-12.7%	*
812	Personal And Laundry Services	56	290	\$19,785	0.61	104.1%	-21.0%	*

* Values that satisfy the following competitive criteria are shaded in grey: location quotient (L.Q.) greater than or equal to 1.25; relative average wage greater than 100%; and differential employment growth rate greater than or equal to 20%.

623	Nursing And Residential Care Facilities	123	1,791	\$19,397	1.26	104.1%	-9.7%	**
111	Crop Production	31	285	\$19,306	0.28	105.0%	18.7%	*
445	Food And Beverage Stores	136	2,128	\$19,008	1.50	99.4%	-1.6%	*
453	Miscellaneous Store Retailers	84	408	\$18,145	0.97	100.3%	18.4%	*
561	Administrative And Support Services	163	3,584	\$16,876	1.03	78.4%	37.6%	*
721	Accommodation	130	1,595	\$16,439	1.97	107.5%	27.0%	***
485	Transit And Ground Passenger Transportation	17	223	\$15,692	1.36	97.3%	247.4%	**
447	Gasoline Stations	88	772	\$14,070	1.86	95.3%	7.5%	*
722	Food Services And Drinking Places	442	5,156	\$12,242	1.12	102.5%	-1.2%	*
814	Private Households	192	202	\$10,084	1.34	73.9%	-32.3%	*

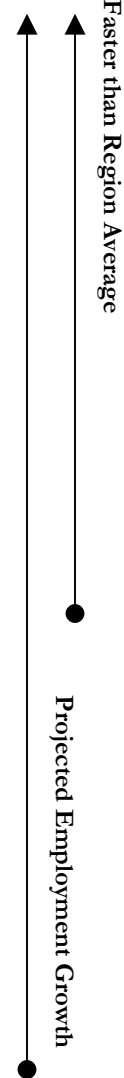
Source: OECD analysis based on QCEW data from the Oregon Employment Department and BLS

Competitive Industries: Employment Projections by Industry

- Of the competitive industries in the region, 30 are projected to have positive employment growth from 2006 and 2016
- Of the competitive industries, 17 are projected to grow faster than the regional average of 10.5%.

Table 9: Competitive Industry Employment Growth Projections (sorted by % change)*

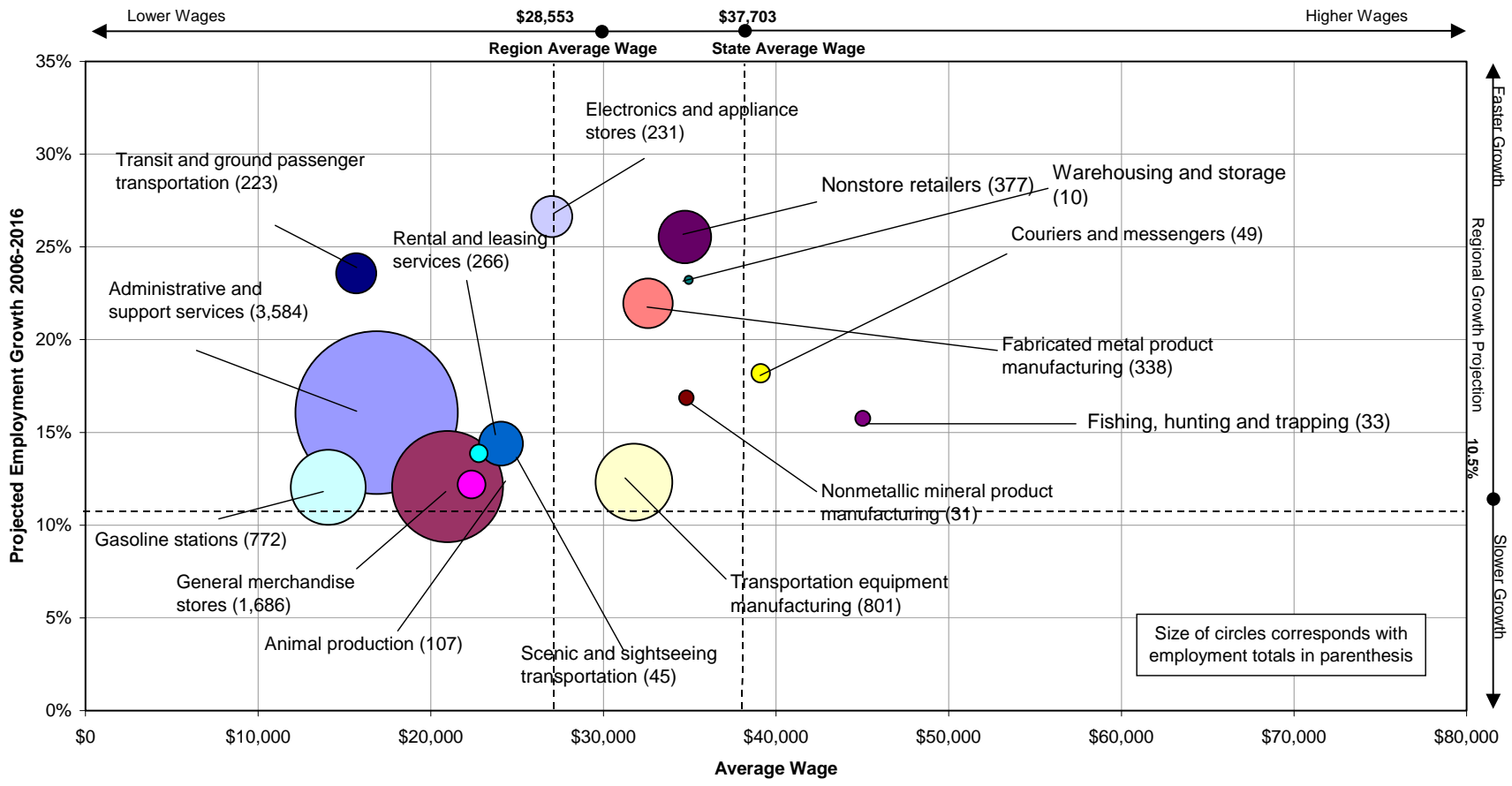
NAICS	Industry	2006	2016	Change	% Change
443	Electronics And Appliance Stores	781	989	208	26.6%
454	Nonstore Retailers	47	59	12	25.5%
485	Transit And Ground Passenger Transportation	1,913	2,364	451	23.6%
493	Warehousing And Storage	56	69	13	23.2%
332	Fabricated Metal Product Manufacturing	788	961	173	22.0%
492	Couriers And Messengers	11	13	2	18.2%
327	Nonmetallic Mineral Product Manufacturing	344	402	58	16.9%
561	Administrative And Support Services	5,161	5,990	829	16.1%
114	Fishing, Hunting And Trapping	254	294	40	15.7%
532	Rental And Leasing Services	3,796	4,342	546	14.4%
487	Scenic And Sightseeing Transportation	1,624	1,849	225	13.9%
336	Transportation Equipment Manufacturing	268	301	33	12.3%
112	Animal Production	1,108	1,243	135	12.2%
452	General Merchandise Stores	414	464	50	12.1%
447	Gasoline Stations	1,902	2,131	229	12.0%
623	Nursing And Residential Care Facilities	293	328	35	11.9%
523	Securities, Commodity Contracts, Investments	513	571	58	11.3%
221	Utilities	950	1,050	100	10.5%
524	Insurance Carriers And Related Activities	268	296	28	10.4%
425	Electronic Markets And Agents And Brokers	231	254	23	10.0%
444	Building Material And Garden Supply Stores	2,113	2,322	209	9.9%
337	Furniture And Related Product Manufacturing	104	114	10	9.6%
722	Food Services And Drinking Places	291	312	21	7.2%
453	Miscellaneous Store Retailers	1,288	1,374	86	6.7%
236	Construction Of Buildings	32	34	2	6.3%
321	Wood Product Manufacturing	243	256	13	5.3%
445	Food And Beverage Stores	358	376	18	5.0%
111	Crop Production	108	113	5	4.6%
115	Agriculture And Forestry Support Activities	309	320	11	3.6%
446	Health And Personal Care Stores	772	797	25	3.2%
237	Heavy And Civil Engineering Construction	5,375	5,158	-217	-4.0%
721	Accommodation	1,645	1,567	-78	-4.7%
212	Mining, Except Oil And Gas	59	49	-10	-16.9%
113	Forestry And Logging	244	199	-45	-18.4%
N/A	Region Private Sector Growth	49,605	54,829	5,224	10.5%



Source: OECD analysis based on CES data from the Oregon Employment Department

* Employment totals in Table 8 vary from those in Tables 9, and 10 because they are from different data sources. Table 8 uses covered employment (gathered from firms that pay unemployment insurance) from the Quarterly Census of Employment (QCEW) and Wages. The employment projections in Table 9 and 10 are based on Current Employment Statistics (CES) that include both covered and uncovered employment.

Top 15 Regionally Competitive Industries



Appendix I: Company Moves to Region

Company	Industry	Destination County	Origin State	Origin City	Move Year	Move Emp
Murray Electrical Contractors	Furniture and Fixtures	Douglas	CA	Ventura	1993	85
Tarwater Appraisal Co	Engineering, Accounting, Research, Management & Related Svcs	Curry	CA	Contra Costa	2003	35
Magness Machine Co Inc	Miscellaneous Manufacturing Industries	Douglas	CA	Shasta	1993	32
Sawyers Used Cat Parts	Eating and Drinking Places	Douglas	CA	Los Angeles	2002	30
Pennington & Assocs	Lumber and Wood Products, Except Furniture	Douglas	WA	King	2002	30
Ender Bill	Construction - Special Trade Contractors	Coos	TX	Travis	1999	22
Marina Plastics	Electronic, Elctrel Eqpmnt & Cmpnts, Excpt Computer Eqpmnt	Coos	CA	San Bernardino	1993	20
Robinson Scott	Industrial and Commercial Machinery and Computer Equipment	Curry	CA	Contra Costa	1990	18
Trionfante Jeff Hennessey Pat	Industrial and Commercial Machinery and Computer Equipment	Douglas	CA	Ventura	1994	17
Fischer William & Sheryl	Business Services	Douglas	CA	Contra Costa	1998	16
Health Watch	Construction - Special Trade Contractors	Douglas	WA	Clark	2000	13
First Place Excavating Inc	Rubber and Miscellaneous Plastic Products	Douglas	CA	Marin	1990	12
Meldisco K-M Of N W Stewart	Personal Services	Coos	CA	Riverside	2004	11
Group One Enterprises	Wholesale Trade - Nondurable Goods	Coos	NM	San Miguel	2003	11
Infinite Creations Inc	Electronic, Elctrel Eqpmnt & Cmpnts, Excpt Computer Eqpmnt	Curry	CA	Ventura	1996	10
Silva Salvage/Demltn	Food Stores	Coos	NJ	Atlantic	1999	10
Ash Racing	Construction - Special Trade Contractors	Douglas	NV	Elko	1997	10
Creative Difference	Engineering, Accounting, Research, Management & Related Svcs	Douglas	CA	Sonoma	2000	9
Antlers Motel	Engineering, Accounting, Research, Management & Related Svcs	Douglas	CA	Alameda	2001	8
Distinct Knowledge	Health Services	Curry	MT	Jefferson	2002	8
Baggett Matthew Md	Engineering, Accounting, Research, Management & Related Svcs	Douglas	UT	Salt Lake	1995	8
Ck Mortgage	Social Services	Coos	CA	San Diego	1994	7
Bills Upholstery	Wholesale Trade - Durable Goods	Coos	NV	Nye	2000	7
Shawn Harper	Construction - Special Trade Contractors	Douglas	AK	Anchorage	2000	6
Just Wood	Industrial and Commercial Machinery and Computer Equipment	Curry	CA	San Mateo	1993	6
Hydro Trailer Inc	Wholesale Trade - Durable Goods	Douglas	CA	Contra Costa	1995	6
Kayak Point Water Co	Home Furniture, Furnishings and Equipment Stores	Douglas	CA	Los Angeles	1990	6
Commemorative Investments Inc	Business Services	Curry	CA	Santa Clara	1990	6
Willoughby Hobbies	Business Services	Douglas	CA	Tehama	1993	6
Fast Cash	Health Services	Douglas	CA	Los Angeles	1997	6
Dykema Engineering Inc	Nondepository Credit Institutions	Curry	WA	King	1995	6
Longview Construction Inc	Agricultural Services	Douglas	CA	San Mateo	2001	5
Marbled Fabrics And Acc	Rubber and Miscellaneous Plastic Products	Douglas	CA	San Diego	1992	5
Porhammer Manufacturing Corp	Transportation Equipment	Coos	CA	San Diego	1999	5
Engleking Trucking Inc	Apparel and Accessory Stores	Curry	CA	Del Norte	1997	5
Salmon Bay Forest Products	Home Furniture, Furnishings and Equipment Stores	Douglas	CA	San Bernardino	1992	5
Harbor Hairport	Building Construction - General Contractors & Operative Builders	Curry	CO	Jefferson	1996	5

Teri Deleo Rn Llc	Construction - Special Trade Contractors	Coos	WA	King	1994	5
Castle Park Montessori School	Fabricated Metal Products, Except Machinery & Transportation Equipment	Douglas	WA	King	1997	5
Spectrum Petrographics Inc	Real Estate	Douglas	WA	King	2003	5
Sierra Construction Company	Home Furniture, Furnishings and Equipment Stores	Douglas	AK	Prince of Wales-Outer Ketchikan	1999	4
Lyon Motor Works Inc	Electronic, Elctrcal Eqpmnt & Cmpnts, Excpt Computer Eqpmnt	Douglas	CA	Santa Cruz	1993	4
Park Meridian Trading Llc	Miscellaneous Retail	Douglas	CA	Ventura	1994	4
William Carol	Real Estate	Douglas	CA	Los Angeles	1992	4
D W M Inc	Business Services	Coos	CA	Los Angeles	1993	4
Midpoint Gallery Inc	Health Services	Curry	CA	Del Norte	1994	4
Dan Wooldridge Consultant	Nondepository Credit Institutions	Coos	NC	Wake	1992	4
Erickson Edwin 4	Business Services	Curry	AK	Southeast Fairbanks	1994	3
Three Pine Ranch	Legal Services	Coos	AK	Anchorage	2001	3
John M Burns Const Consulting	Agricultural Services	Curry	CA	Mendocino	2002	3
Acme Construction Co	Agricultural Services	Curry	CA	Mendocino	2002	3
Crooch Harris Plbg Htg Co Inc	Construction - Special Trade Contractors	Coos	CA	Stanislaus	2002	3
Power Painting	Construction - Special Trade Contractors	Curry	CA	Los Angeles	1990	3
G T Hawkins Electric	Lumber and Wood Products, Except Furniture	Coos	CA	San Diego	2002	3
Portfolio Inc	Electronic, Elctrcal Eqpmnt & Cmpnts, Excpt Computer Eqpmnt	Coos	CA	San Luis Obispo	1998	3
Pressure Specialties Inc	Mesr/Anlyz/Cntrl Instrmnts; Photo/Med/Opt Gds; Watches/Clocks	Coos	CA	Shasta	2004	3
Alaton Inc	Mesr/Anlyz/Cntrl Instrmnts; Photo/Med/Opt Gds; Watches/Clocks	Curry	CA	Humboldt	1993	3
Test Engineering	Wholesale Trade - Durable Goods	Douglas	CA	Mendocino	1992	3
San Clemente Limousine	Apparel and Accessory Stores	Coos	CA	Tulare	1991	3
Materials Management Group	Eating and Drinking Places	Coos	CA	San Francisco	2004	3
Defense Industrial Tech Llc	Miscellaneous Retail	Douglas	CA	Orange	1990	3
Talley Home Sales	Depository Institutions	Curry	CA	Sacramento	1999	3
Strobel Ellen	Hotels, Rooming Houses, Camps, and Other Lodging Places	Douglas	CA	Plumas	2004	3
Practical Precision Shooter	Business Services	Douglas	CA	Santa Barbara	2004	3
Dan O Randall	Engineering, Accounting, Research, Management & Related Svcs	Douglas	CA	Los Angeles	1994	3
Blue Moon Real Estate & Dev	Engineering, Accounting, Research, Management & Related Svcs	Douglas	CA	Los Angeles	1997	3
Leonard Azar	Engineering, Accounting, Research, Management & Related Svcs	Coos	CA	Shasta	2002	3
Fisher Edward G	Agricultural Services	Coos	ID	Idaho	2002	3
V T West Inc	Motion Pictures	Douglas	MD	Talbot	2000	3
Fab-Mac Llc	Apparel and Accessory Stores	Douglas	NJ	Bergen	2000	3
Advance Changer Sales & Svc	Miscellaneous Retail	Coos	TX	Collin	1990	3
Ley Richard W Architect	Electric, Gas and Sanitary Services	Curry	WA	Jefferson	2003	3
Lompico Creek Press	Miscellaneous Repair Services	Douglas	WA	King	2003	3
Henderson Brothers	Personal Services	Douglas	AL	Etowah	2003	2
State Of Ark Veterinary Svcs	Miscellaneous Manufacturing Industries	Douglas	AZ	Maricopa	1997	2
Animal Eye Clinic Inc	Wholesale Trade - Durable Goods	Douglas	AZ	Maricopa	2004	2
Back Ridge Tree Svc	Agricultural Production - Crops	Douglas	CA	Lake	2001	2

Blue Sky Tree Service	Agricultural Production - Crops	Curry	CA	Nevada	1994	2
Barton Residential Inc	Agricultural Services	Douglas	CA	Kern	2000	2
Vantage Construction Inc	Agricultural Services	Curry	CA	Riverside	2001	2
Vincent Wallcovering Co	Construction - Special Trade Contractors	Curry	CA	Santa Clara	1991	2
Equipment Refinishers Inc	Apparel, Finished Products from Fabrics & Similar Materials	Curry	CA	El Dorado	2002	2
Brazil Patra	Stone, Clay, Glass, and Concrete Products	Coos	CA	Placer	2004	2
Holley Moulding Inc	Fabricated Metal Products, Except Machinery & Transportation Equipment	Douglas	CA	San Luis Obispo	1991	2
S & K Precision	Miscellaneous Manufacturing Industries	Coos	CA	Riverside	2004	2
Dhk Group	Local, Suburban Transit & Interurbn Hgwy Passenger Transport	Douglas	CA	Tuolumne	1997	2
Cryogenetic Technology Inc	Motor Freight Transportation	Douglas	CA	Santa Cruz	1991	2
Cafra Manufacturing Inc	Wholesale Trade - Durable Goods	Curry	CA	Santa Cruz	2002	2
J C Dean Goldsmith	Wholesale Trade - Durable Goods	Douglas	CA	Riverside	2003	2
Bland Dana	Wholesale Trade - Durable Goods	Douglas	CA	Los Angeles	1992	2
V T Industries Inc	Home Furniture, Furnishings and Equipment Stores	Douglas	CA	Tulare	1999	2
Mcdonough Dan	Eating and Drinking Places	Douglas	CA	Sonoma	1990	2
Biermeister	Miscellaneous Retail	Curry	CA	San Diego	1991	2
Eccentrics	Miscellaneous Retail	Curry	CA	San Bernardino	1993	2
Classic Clothes	Holding and Other Investment Offices	Douglas	CA	San Bernardino	2003	2
Jouberts Llc	Business Services	Douglas	CA	San Francisco	1991	2
Bruckmeirs Bavarian Inn	Business Services	Coos	CA	Kern	1993	2
Cleveland Robert H	Engineering, Accounting, Research, Management & Related Svcs	Curry	CA	Orange	2004	2
Puliafico Investments Llc	Engineering, Accounting, Research, Management & Related Svcs	Douglas	CA	Orange	2002	2
Creative Expressions	Real Estate	Curry	CO	Las Animas	2003	2
Russo Communication Group	Miscellaneous Retail	Coos	FL	Martin	2003	2
Spurlock Mary Ann	Business Services	Curry	FL	Pinellas	1997	2
Taplin Janitorial Service	Construction - Special Trade Contractors	Douglas	ID	Ada	1993	2
Katies Cleaning Service	Building Matrials, Hrdwr, Garden Supply & Mobile Home Deals	Curry	ID	Ada	1995	2
Sabre Refining Inc	Miscellaneous Repair Services	Curry	ID	Lemhi	2002	2
Simulation Software Systems	Personal Services	Douglas	IL	Kane	1994	2
Alternate Solutions	Business Services	Douglas	IL	Kane	1994	2
Crs Computing	Engineering, Accounting, Research, Management & Related Svcs	Curry	IN	Hamilton	2004	2
Megalodon Multimedia Inc	Personal Services	Curry	MD	Baltimore	2001	2
Infotech North Llc	Nonclassifiable Establishments	Coos	MO	Laclede	2003	2
Hanson Peggy	Miscellaneous Retail	Douglas	NE	Douglas	2004	2
Beckers Gary Truck Repair	Printing, Publishing and Allied Industries	Coos	NV	Carson City	2002	2
Positive Directions	Business Services	Curry	UT	Tooele	2002	2
Edward J Ottenheimer	Agricultural Services	Coos	WA	Yakima	2003	2
Deckard P Woran Cpa	Wholesale Trade - Durable Goods	Douglas	WA	Kitsap	1999	2
Balance Marketing Llc	Business Services	Douglas	WA	Spokane	2003	2
Fotan Consulting	Business Services	Douglas	WA	Whatcom	2004	2
Welch Gordon W	Miscellaneous Repair Services	Coos	WA	Okanogan	1990	2
Gillingham Co	Miscellaneous Retail	Coos	WY	Uinta	2002	2
Packard Suzie Q Dvm	Building Construction - General Contractors & Operative Builders	Coos	AZ	Yavapai	2002	1

Spring Creek Ranch-Emu	Miscellaneous Retail	Douglas	AZ	Cochise	2003	1
D&J Landscape & Maintenance	Miscellaneous Retail	Curry	AZ	Maricopa	2002	1
Lawn Ranger Gardening	Personal Services	Coos	AZ	Maricopa	2004	1
Lynn Const & Land Develp	Agricultural Services	Douglas	CA	Santa Clara	1992	1
Mc Callister Ken Construction	Building Construction - General Contractors & Operative Builders	Curry	CA	Solano	2002	1
Ajm Construction	Building Construction - General Contractors & Operative Builders	Curry	CA	Santa Clara	1991	1
Capital H Construction	Building Construction - General Contractors & Operative Builders	Coos	CA	Ventura	2004	1
Morse Construction Inc	Building Construction - General Contractors & Operative Builders	Douglas	CA	Sacramento	2004	1
Mick Bill Construction	Building Construction - General Contractors & Operative Builders	Coos	CA	Alameda	2001	1
A & E Heating Inc	Construction - Special Trade Contractors	Curry	CA	Del Norte	1999	1
Chambers Plumbing & Heating	Construction - Special Trade Contractors	Coos	CA	Santa Clara	2003	1
Lewis Bob Painting	Textile Mill Products	Douglas	CA	Sonoma	2002	1
North Valley Electric	Furniture and Fixtures	Coos	CA	Sonoma	1995	1
Hal Enterprises Inc	Rubber and Miscellaneous Plastic Products	Coos	CA	Santa Clara	1992	1
Freight Container Corporation	Industrial and Commercial Machinery and Computer Equipment	Curry	CA	Monterey	1999	1
Nelson Manufacturing Co Inc	Miscellaneous Manufacturing Industries	Curry	CA	Los Angeles	1990	1
Stoner Communications Inc	Miscellaneous Manufacturing Industries	Douglas	CA	San Diego	2003	1
N C Electronics Services Inc	Transportation Services	Douglas	CA	San Bernardino	2002	1
E & L Manufacturing Inc	Wholesale Trade - Durable Goods	Douglas	CA	Solano	2001	1
American Display Inc	Wholesale Trade - Durable Goods	Coos	CA	Fresno	2003	1
Phoenix Industries Llc	Wholesale Trade - Nondurable Goods	Curry	CA	Plumas	2002	1
Lonon Karen L Custom Brokerage	Apparel and Accessory Stores	Curry	CA	Humboldt	1991	1
Murphy Graphics	Miscellaneous Retail	Curry	CA	Humboldt	2000	1
Pacific Tool Group	Miscellaneous Retail	Coos	CA	Kern	2003	1
Db Western Inc - New Mexico	Nondepository Credit Institutions	Curry	CA	San Diego	1999	1
Hollibaugh Manufactured Homes	Real Estate	Coos	CA	San Diego	2002	1
Consumer Health Research Inc	Real Estate	Curry	CA	San Joaquin	2004	1
F & G Interiors	Personal Services	Curry	CA	Humboldt	2004	1
Petri Electronics	Personal Services	Douglas	CA	Ventura	2003	1
Southeast Satellite Systems	Business Services	Douglas	CA	Kings	2004	1
Artbeats	Business Services	Douglas	CA	San Diego	2003	1
Bicycle Shop	Business Services	Douglas	CA	Shasta	2000	1
Brian Bowers Sports Cards	Business Services	Coos	CA	Sonoma	2003	1
Old Lion	Business Services	Coos	CA	San Mateo	2002	1
Yarn Farm	Business Services	Douglas	CA	San Mateo	2003	1
Nuance Gifts	Business Services	Coos	CA	Humboldt	2002	1
Norms Mobile Tire Servic	Automotive Repair, Services and Parking	Douglas	CA	San Bernardino	1995	1
Golub Harry	Automotive Repair, Services and Parking	Douglas	CA	Los Angeles	1992	1
Evans Tricia	Automotive Repair, Services and Parking	Douglas	CA	Sonoma	2002	1
Pacific Business Machines	Miscellaneous Repair Services	Douglas	CA	San Bernardino	2004	1

Chetco Svc Organization Inc	Health Services	Douglas	CA	Santa Cruz	2003	1
Peace River Holding & Inv Corp	Health Services	Curry	CA	San Diego	2003	1
Country Living Mfg Home Cmnty	Engineering, Accounting, Research, Management & Related Svcs	Douglas	CA	Sonoma	2001	1
Tridea Investments	Engineering, Accounting, Research, Management & Related Svcs	Douglas	CA	Napa	2002	1
Wow What A Difference	Engineering, Accounting, Research, Management & Related Svcs	Coos	CA	Santa Cruz	2004	1
Butterflies & Bubbles	Building Construction - General Contractors & Operative Builders	Coos	CO	Boulder	2004	1
Charys	Wholesale Trade - Nondurable Goods	Douglas	CO	Arapahoe	2003	1
Abigails Wellness Bodycare	Personal Services	Coos	CO	Adams	1999	1
Mears Robbin	Agricultural Services	Coos	FL	Okaloosa	2003	1
Marriage Plus Ministries	Personal Services	Douglas	FL	Hillsborough	2004	1
Suncrest Trading	Engineering, Accounting, Research, Management & Related Svcs	Douglas	FL	Wakulla	1996	1
Buffalo Ridge Trading Co	Agricultural Production - Crops	Coos	IA	Adams	1998	1
Aries Building Maintenance	Real Estate	Curry	ID	Ada	2003	1
Greysounds	Engineering, Accounting, Research, Management & Related Svcs	Curry	ID	Latah	2003	1
Gonzos Run	Building Construction - General Contractors & Operative Builders	Douglas	MT	Beaverhead	2004	1
Drivon Investigations	Agricultural Production - Livestock and Animal Specialties	Douglas	NE	Keya Paha	2004	1
Original Fit Interiors	Construction - Special Trade Contractors	Douglas	NV	Clark	2002	1
Docs Welding & Machine	Services, Not Elsewhere Classified	Curry	NV	Carson City	2004	1
A1 Aggressive Lock & Key	Miscellaneous Retail	Douglas	TX	Tyler	2002	1
James D Helliwell Inc	Business Services	Douglas	TX	Harris	2003	1
Corum Bruce	Building Construction - General Contractors & Operative Builders	Curry	WA	Pierce	2004	1
Strawberry Mountain Hlth Care	Building Construction - General Contractors & Operative Builders	Douglas	WA	Snohomish	2000	1
Linda Ellis Bookkeeping	Miscellaneous Retail	Douglas	WA	Spokane	1995	1
Profit Group	Real Estate	Douglas	WA	Klickitat	2002	1
Waldon Financial Services	Personal Services	Douglas	WA	San Juan	2004	1
Compliance Solutions Llc	Personal Services	Coos	WA	Yakima	2003	1
Dymaxion Group	Business Services	Douglas	WA	Okanogan	2003	1
Fieldflex	Miscellaneous Repair Services	Douglas	WA	Island	2004	1
Patricia Sauer	Amusement and Recreation Services	Douglas	WA	Snohomish	2002	1
Compliance Service America Llc	Health Services	Douglas	WA	Jefferson	2004	1
Lanny Little	Engineering, Accounting, Research, Management & Related Svcs	Douglas	WA	King	2002	1
Project Controls Prof Svcs	Services, Not Elsewhere Classified	Coos	WA	Whatcom	2003	1
Moser Lit	Services, Not Elsewhere Classified	Douglas	WA	Jefferson	2002	1

Source: OECD analysis using National Establishment Time Series Database (Wall and Associates)

Appendix II: Company Moves from Region

Company	Industry	Origin County	Destination State	Move Year	Move Emp
Bussey Derrell Appliances	Electronic, Elctrcal Eqpmnt & Cmpnts, Excpt Computer Eqpmnt	Douglas	WA	1993	50
Showcase Realty	Furniture and Fixtures	Douglas	IA	1997	42
Nephrology Services Group O	Miscellaneous Manufacturing Industries	Curry	NV	1991	40
Winston Hair Designs	Eating and Drinking Places	Coos	WA	1991	27
Mk Ranch & Transporting	Mesr/Anlyz/Cntrl Instrmnts; Photo/Med/Opt Gds; Watchs/Clocks	Coos	CA	1999	25
I Love Clocks	Construction - Special Trade Contractors	Douglas	WA	1998	21
Soper Barton L Dds	Industrial and Commercial Machinery and Computer Equipment	Douglas	CA	1996	17
Marler Appraisal Svc	Educational Services	Coos	CA	1998	15
Health Sense International	Wholesale Trade - Durable Goods	Curry	CA	1996	10
Chicago Street Eatery	Construction - Special Trade Contractors	Curry	CA	2001	7
Sunset Spas	Home Furniture, Furnishings and Equipment Stores	Douglas	CA	1990	5
Commerce Trading Inc	Real Estate	Douglas	CA	2004	5
Part-Net International Corp	Miscellaneous Retail	Coos	FL	1991	5
Vancho James E Dc Pc	Home Furniture, Furnishings and Equipment Stores	Coos	NC	2001	5
Central Valley Realty	Engineering, Accounting, Research, Management & Related Svcs	Douglas	WA	1998	5
Jims Remodeling & Painting	Miscellaneous Retail	Curry	CA	1995	4
Morse Construction Inc	Communications	Douglas	CA	2000	4
J & B Computers N More	Automotive Dealers and Gasoline Service Stations	Coos	CA	2004	3
Anderson Gail Dr	Agricultural Production - Crops	Curry	CA	1991	3
Myrtle Point Chevron	Real Estate	Douglas	CA	2002	3
Lind Studios	Apparel and Accessory Stores	Douglas	CA	1992	3
Seveys Plumbing Service Inc	Engineering, Accounting, Research, Management & Related Svcs	Douglas	CA	2002	3
Dressing Room	Personal Services	Douglas	CA	2004	3
Hannans Entertainment Inc	Wholesale Trade - Durable Goods	Douglas	CA	2002	3
Warren Applicators	Rubber and Miscellaneous Plastic Products	Douglas	CA	1990	3
Kayak Point Water Co	Eating and Drinking Places	Douglas	CA	2002	3
Right Direction Publication	Lumber and Wood Products, Except Furniture	Douglas	GA	1991	3
T & T Floors	Electric, Gas and Sanitary Services	Curry	NV	2004	3
Barrett & Co Cpas	Personal Services	Douglas	WA	2004	3
Thomas/Wright Inc	Legal Services	Douglas	WA	1997	3
J-Bach Plastics Inc	Personal Services	Douglas	AK	2001	2
Coast Con Cutng & Cnstr Co	Building Construction - General Contractors & Operative Builders	Coos	AZ	2004	2
S And S Medical	Mesr/Anlyz/Cntrl Instrmnts; Photo/Med/Opt Gds; Watchs/Clocks	Coos	CA	1992	2
Sleep Dimensions	Eating and Drinking Places	Coos	CA	2003	2
Coos River Outfitters Inc	Motion Pictures	Curry	CA	2000	2
Crookston Jerry	Engineering, Accounting, Research, Management & Related Svcs	Curry	CA	1996	2
China House Restaurant	Services, Not Elsewhere Classified	Douglas	CA	2003	2
Advision	Health Services	Douglas	CO	2004	2
Pacific Management Institute	Home Furniture, Furnishings and Equipment Stores	Coos	FL	2003	2
Rosesoft Corporation	Health Services	Coos	FL	1994	2
Sabrina Scott Co Inc	Holding and Other Investment Offices	Douglas	FL	2003	2
T A F Etcetera	Real Estate	Douglas	FL	1995	2
Mc Dill John M Construction	Health Services	Douglas	ID	1992	2

Magness Machine Co Inc	Engineering, Accounting, Research, Management & Related Svcs	Curry	MD	2003	2
Pacific Coast Technologies	Business Services	Douglas	MN	2004	2
Quality Staffing Mgt Resources	Business Services	Curry	MO	2003	2
Roseburg Appliance Service	Real Estate	Coos	MS	2000	2
Hf Holdings	Security & Commodity Brokers, Dealers, Exchanges & Services	Coos	MT	2003	2
Umpqua Barber Shop	Miscellaneous Retail	Coos	MT	1995	2
Computer Directions	Miscellaneous Retail	Coos	MT	2003	2
Crozier Nancy	Lumber and Wood Products, Except Furniture	Douglas	MT	2002	2
Exit 80 Tow	Wholesale Trade - Nondurable Goods	Curry	OH	2003	2
Ruths Business Service	Automotive Repair, Services and Parking	Douglas	OK	2004	2
Grant-Niesen Inc	Miscellaneous Repair Services	Douglas	RI	2002	2
G V Cleaners Inc	Hotels, Rooming Houses, Camps, and Other Lodging Places	Coos	WA	2004	2
Apace Maintenance Equipment Co	Home Furniture, Furnishings and Equipment Stores	Douglas	WA	2003	2
Anderson & Adamson Llp	Hotels, Rooming Houses, Camps, and Other Lodging Places	Douglas	WA	2004	2
Campbell Fleary Construction	Business Services	Douglas	WA	1990	2
V-T West Inc	Miscellaneous Repair Services	Douglas	WA	1990	2
Mcwash Laundry & Deli	Legal Services	Douglas	WA	2001	2
Murray Electrical Contractors	Engineering, Accounting, Research, Management & Related Svcs	Douglas	WA	1999	2
Maloy Nancy Lpc	Miscellaneous Repair Services	Douglas	AL	2003	1
Lanny Little	Building Matrials, Hrdwr, Garden Supply & Mobile Home Dealrs	Douglas	AZ	2001	1
Centaurus Financial Inc	Wholesale Trade - Durable Goods	Douglas	AZ	1999	1
Visual Records	Miscellaneous Retail	Douglas	AZ	2003	1
Alternate Interiors	Building Construction - General Contractors & Operative Builders	Douglas	AZ	2001	1
Vision Foundation Inc	Fabricated Metal Products, Except Machinery & Transportation Equipment	Coos	CA	1993	1
Ga Liddle & Associates	Business Services	Coos	CA	2003	1
Herbarium Supply Inc	Wholesale Trade - Nondurable Goods	Coos	CA	1992	1
Adams Jewelry	Nondepository Credit Institutions	Curry	CA	1999	1
Farmer Pies Inc	Apparel and Accessory Stores	Curry	CA	2003	1
Treasures	Building Construction - General Contractors & Operative Builders	Douglas	CA	2001	1
House Rock Research Inc	Miscellaneous Retail	Douglas	CA	2004	1
Egret Communciations	Building Construction - General Contractors & Operative Builders	Douglas	CA	2004	1
Ck Mortgage	Business Services	Douglas	CA	1999	1
Smith River Farms Inc	Miscellaneous Retail	Douglas	CA	2003	1
Stateline Myrtlewood	Building Construction - General Contractors & Operative Builders	Coos	CO	1994	1
Oregon Coast Quilting	Miscellaneous Manufacturing Industries	Coos	CO	2002	1
Dba Swartzentruber Logging	Business Services	Douglas	ID	2004	1
C J Lewis Enterprises Inc	Business Services	Coos	MO	2001	1
Off Main	Miscellaneous Retail	Curry	MO	2003	1
Ricks Residential Repair	Security & Commodity Brokers, Dealers, Exchanges & Services	Curry	MO	2003	1
Dodge Creek Tack Shop	Business Services	Douglas	NC	2002	1
K-J-Cin Enterprises Inc	Business Services	Coos	NE	2004	1
Henry G Grundstedt	Construction - Special Trade Contractors	Coos	NV	2004	1
Crager Construction	Business Services	Coos	TX	2001	1
Laminated Technology Of Oregon	Miscellaneous Retail	Curry	UT	2004	1

Tietze Darrel F	Social Services	Coos	WA	2003	1
Elk Ridge Gifts	Construction - Special Trade Contractors	Coos	WA	2000	1
North Umpqua Equipment Rental	Services, Not Elsewhere Classified	Coos	WA	2004	1
Com-Pacific Resources Inc	Health Services	Coos	WA	2003	1
Pacific Tool Group	Miscellaneous Retail	Douglas	WA	2001	1
Trail Building	Building Construction - General Contractors & Operative Builders	Douglas	WA	2001	1
Copeland Management Concepts	Building Construction - General Contractors & Operative Builders	Douglas	WA	1994	1

Source: OECD analysis using National Establishment Time Series database (Wall and Associates)