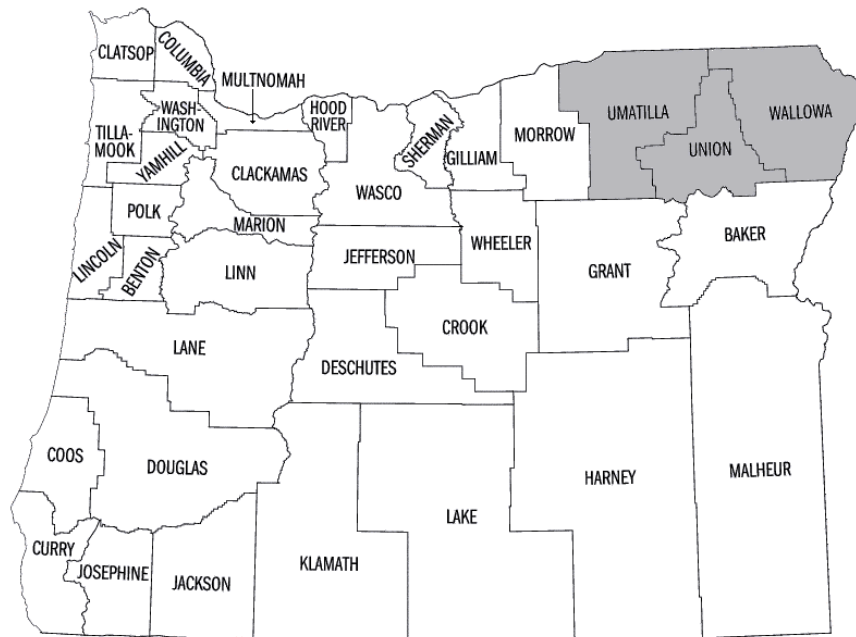


**OREGON**  
ECONOMIC & COMMUNITY DEVELOPMENT DEPARTMENT

**Regional Analysis**  
**Umatilla, Union and Wallowa Counties**

**April 2008**



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## 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 Umatilla, Union and Wallowa 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 (31,001) accounts for (2.2%) of private sector employment in Oregon (1.4 million).
- Average private sector wages in the region (\$27,796) are 26.3% lower than the state average of \$37,703.
- Umatilla and Union counties account for 94.3% of regional employment.
- Umatilla County was the only county in the region to have negative employment growth.

### Interstate Business Moves

- The region was a net exporter of business establishments between 1990 and 2004.
- The region had a net gain of business from California, Maryland and New Jersey.
- The region had a net loss of business establishments that moved to Arizona, Idaho, Utah and Ohio.
- The disparity between net establishments the region gained and lost was small (-7).
- Service industry business (Business Services, Agricultural Services and Insurance Agents, Brokers & Service) 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% between 2004 and 2006.
- Umatilla and Wallowa counties had population declines between 2004 and 2006.
- The share of retirement age workers in the region (17.2%) is almost equal to the state average of 16.6%.
- Only two industries have lower proportions of retirement age workers than the statewide averages for those sectors: Leisure & Hospitality and Manufacturing.

### Competitive Industries

- The region has 28 industries that met at least one of the competitiveness criteria<sup>1</sup>.
- Of the 28 competitive industries, 23 are projected to grow by 2016.
- Eleven of the competitive industries are projected to grow faster than the regional average.
- The following four competitive industries have average wages above the regional average employment: Agriculture & Forestry Support Activities, Waste Management & Remediation Services, Transportation Equipment Manufacturing and Food Manufacturing.
- Transportation Equipment Manufacturing is the only industry where average wages AND employment growth exceed the regional averages.

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<sup>1</sup> 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%.

## **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 (OECD) regional service area made up of Umatilla, Union and Wallowa 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 Umatilla, Union and Wallowa counties accounts for 2.2% of Oregon's private sector employment.
- The average wage in each county of the region is below the state average.
- Umatilla County has the region's highest average wage and the largest share of regional employment.
- The highest average wage in the region is 24.8% lower than the state average wage.

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

Area	Est.	Employment	Average Wage	% of Region Employment	% of Region Avg. Wage
Umatilla	1,784	21,712	\$28,343	70.0%	102.0%
Union	819	7,531	\$27,532	24.3%	99.1%
Wallowa	366	1,758	\$22,172	5.7%	79.8%
Region	2,969	31,001	\$27,796	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

- Population growth in each county of the region is lower than the state average.
- Union County is the only county with positive population growth in the region.
- Although Wallowa County has the highest employment growth (5.6%) in the region, they are still lower than the state average of 5.9%.
- Umatilla County has the third lowest employment growth out of all counties in the state.
- Umatilla and Wallowa counties have the same population decline between 2004 and 2006.

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

Area	Employment	Population	Emp. Growth Rank	Pop. Growth Rank
Umatilla	-1.8%	-0.1%	34	30
Union	1.5%	1.0%	30	21
Wallowa	5.6%	-0.1%	14	30
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 exporter of business establishments between 1990 and 2004.
- The top feeder state and the top stealer state are California and Arizona respectively.
- The number of establishments the region gained from California was exactly same it lost to Arizona.
- The region had a net loss of four establishments to each of the following states: Arizona, Idaho and Utah.

**Table 3. Top Feeder States (1990-2004)**

State	Net Est. Gain
California	4
Maryland	2
New Jersey	2

**Table 4. Top Stealer States (1990-2004)**

State	Net Est. Loss
Arizona	-4
Idaho	-4
Utah	-4
Ohio	-3

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

- On net, the region gained 11 establishments from service industries.
- Four industries experienced no business relocations out of the region: Food & Kindred Products, Apparel & Accessory Stores, Insurance Agents, Brokers & Service and Miscellaneous Repair Services.

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

Industry	Move In	Move Out	Net Change
Business Services	10	5	5
Agricultural Services	3	1	2
Food and Kindred Products	2	0	2
Lumber and Wood Products, Except Furniture	3	1	2
Apparel and Accessory Stores	2	0	2
Home Furniture, Furnishings and Equipment Stores	4	2	2
Insurance Agents, Brokers and Service	2	0	2
Miscellaneous Repair Services	2	0	2
All	70	77	-7

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

- The largest net establishment loss occurred in the Miscellaneous Retail industry.
- Within Agricultural Production, five times as many establishments moved out of the region, as moved in.

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

Industry	Move In	Move Out	Net Change
Miscellaneous Retail	3	9	-6
Agricultural Production - Crops	1	5	-4
Automotive Dealers and Gasoline Service Stations	1	4	-3
Health Services	3	6	-3
All	70	77	-7

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

## Age Demographics by Industry

- The top three industries with the highest percentage of retirement age workers are: Other Services, Educational & Health Services and Natural Resources & Mining.
- Educational & Health Services has the highest number of retirement age workers and the second largest percentage of retirement age workers.
- The Information industry has the fewest number of workers and retirement age workers.
- The share of retirement age workers in four industries is lower than the state average (16.6%): Construction, Leisure & Hospitality, Manufacturing and Retail Trade.
- 47.4% of the region's retirement age workers are in three industries: Educational and Health Services, Manufacturing and Retail Trade.

**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%	1,591	237	14.9%
Educational and Health Services	205,443	41,376	20.1%	4,167	884	21.2%
Financial Activities	89,086	16,137	18.1%	1,569	301	19.2%
Information	34,853	4,823	13.8%	493	83	16.8%
Leisure and Hospitality	164,490	17,096	10.4%	3,415	343	10.0%
Manufacturing	203,499	33,994	16.7%	5,806	845	14.6%
Natural Resources and Mining	48,201	10,118	21.0%	3,056	642	21.0%
Other Services	61,801	13,418	21.7%	1,037	263	25.4%
Professional and Business Services	98,476	17,325	17.6%	834	166	19.9%
Retail Trade	203,439	30,352	14.9%	4,739	759	16.0%
Wholesale Trade	84,563	14,420	17.1%	1,179	232	19.7%
All	1,347,249	223,868	16.6%	30,487	5,254	17.2%

Source: Oregon Employment Department, Local Employment Dynamics

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\* 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 83 reportable (non-confidential data) 3-digit NAICS industry in the region, 28 met at least one of the competitiveness criteria .
- Employment in these industries accounts for 77.3% of private employment in the region.
- Only two industries in the region met all three competitive criteria: Agriculture & Forestry Support Activities and Waste Management & Remediation Services.
- The Waste Management & Remediation Services industry has the highest employment concentration, which is almost seven times the concentration of the state as a whole.
- The differential growth rate in three industries is higher than 200%: Transportation Equipment Manufacturing, Professional & Technical Services and Health & Personal Care Stores.

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

NAICS	NAICS Description	Est.	Employment	Average Wage	LQ	Relative Wage	Differential Growth Rate	# of Criteria Met
101	Goods-Producing	695	9,789	\$29,892	1.27	74.6%	-5.4%	*
336	Transportation Equipment Manufacturing	15	1,740	\$33,295	4.40	86.7%	204.0%	**
311	Food Manufacturing	21	1,638	\$29,336	3.43	105.7%	-34.4%	**
111	Crop Production	116	1,422	\$20,862	2.42	113.4%	-25.4%	**
623	Nursing And Residential Care Facilities	64	1,271	\$18,189	1.56	97.6%	5.3%	*
452	General Merchandise Stores	19	1,076	\$20,570	1.34	107.9%	-5.7%	**
445	Food And Beverage Stores	61	1,011	\$20,053	1.25	104.8%	-3.9%	**
115	Agriculture And Forestry Support Activities	60	881	\$22,050	4.21	112.4%	20.0%	***
441	Motor Vehicle And Parts Dealers	71	833	\$33,677	1.41	94.2%	-1.1%	*
562	Waste Management And Remediation Services	11	784	\$66,657	6.77	182.1%	36.7%	***
484	Truck Transportation	90	765	\$44,497	1.81	128.5%	-3.3%	**
447	Gasoline Stations	46	598	\$14,639	2.52	99.2%	6.3%	*
321	Wood Product Manufacturing	16	520	\$34,174	0.74	100.2%	5.2%	*
541	Professional And Technical Services	171	274	\$30,285	0.19	64.1%	534.1%	*
221	Utilities	14	187	\$77,061	1.81	128.1%	-1.3%	**
113	Forestry And Logging	46	185	\$35,892	1.12	101.5%	41.6%	**
112	Animal Production	23	150	\$24,844	2.23	109.7%	-29.8%	**
446	Health And Personal Care Stores	16	138	\$23,475	0.84	97.2%	366.5%	*
326	Plastics And Rubber Products Manufacturing	6	125	\$37,505	0.86	117.3%	11.0%	*
485	Transit And Ground Passenger Transportation	7	122	\$17,012	1.30	105.5%	1.3%	**
532	Rental And Leasing Services	20	118	\$21,240	0.73	90.9%	32.8%	*
812	Personal And Laundry Services	32	113	\$21,426	0.42	112.7%	-15.5%	*
332	Fabricated Metal Product Manufacturing	9	82	\$25,180	0.23	71.7%	37.8%	*
488	Support Activities For Transportation	12	38	\$28,696	0.24	77.5%	141.5%	*
492	Couriers And Messengers	9	32	\$37,037	0.22	129.6%		*
515	Broadcasting, Except Internet	7	30	\$29,997	0.40	72.8%	88.2%	*
624	Social Assistance	46	24	\$18,839	0.04	101.8%		*
999	Unclassified	10	13	\$17,547	0.88	45.1%	131.5%	*

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

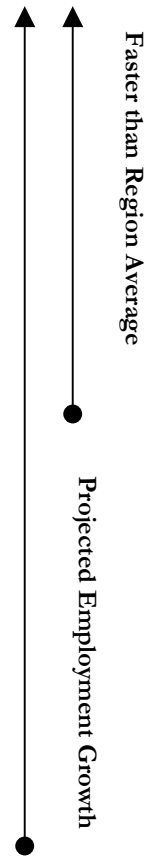
\* Values that satisfy the following competitive criteria are shaded in grey: location quotient (L.Q.) greater than or equal to 1.25; relative average wage greater than 100%; and differential employment growth rate greater than or equal to 20%.

## Competitive Industries: Employment Projections by Industry

- Of the competitive industries in the region, 23 are projected to have positive employment growth between 2006 and 2016.
- Of the competitive industries, 11 are projected to grow faster than the regional average of 12.0%.
- The fastest growing competitive industry in the region is projected to be Professional & Technical Services (26.3%).
- Manufacturing industry businesses are the largest sector in the competitive industries and are projected to grow faster than the regional average.

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

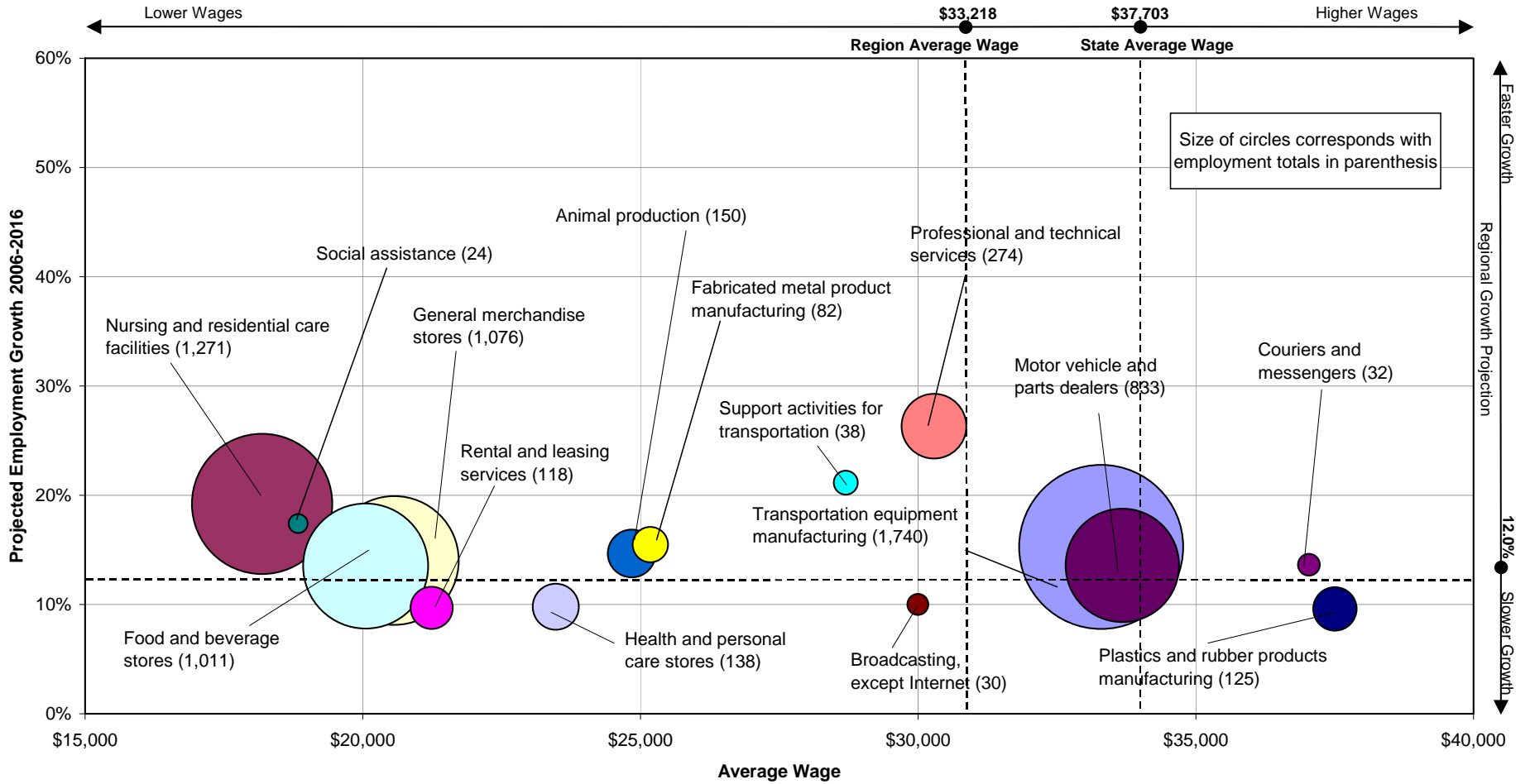
NAICS	Industry	2006	2016	Change	% Change
541	Professional And Technical Services	1,258	1,589	331	26.3%
488	Support Activities For Transportation	52	63	11	21.2%
623	Nursing And Residential Care Facilities	870	1,037	167	19.2%
624	Social Assistance	598	702	104	17.4%
332	Fabricated Metal Product Manufacturing	252	291	39	15.5%
336	Transportation Equipment Manufacturing	1,742	2,008	266	15.3%
112	Animal Production	150	172	22	14.7%
452	General Merchandise Stores	1,049	1,196	147	14.0%
492	Couriers And Messengers	44	50	6	13.6%
441	Motor Vehicle And Parts Dealers	1,378	1,565	187	13.6%
445	Food And Beverage Stores	1,762	2,000	238	13.5%
515	Broadcasting, Except Internet	80	88	8	10.0%
446	Health And Personal Care Stores	317	348	31	9.8%
532	Rental And Leasing Services	196	215	19	9.7%
326	Plastics And Rubber Products Manufacturing	125	137	12	9.6%
812	Personal And Laundry Services	143	156	13	9.1%
311	Food Manufacturing	2,413	2,594	181	7.5%
115	Agriculture And Forestry Support Activities	1,617	1,722	105	6.5%
484	Truck Transportation	1,105	1,172	67	6.1%
485	Transit And Ground Passenger Transportation	78	82	4	5.1%
447	Gasoline Stations	1,018	1,048	30	2.9%
221	Utilities	515	528	13	2.5%
111	Crop Production	2,623	2,625	2	0.1%
321	Wood Product Manufacturing	1,938	1,901	-37	-1.9%
113	Forestry And Logging	450	440	-10	-2.2%
562	Waste Management And Remediation Services	N/A	N/A	N/A	N/A
101	Goods-Producing	N/A	N/A	N/A	N/A
999	Unclassified	N/A	N/A	N/A	N/A
<b>N/A</b>	<b>Region Private Sector Growth</b>	<b>22,380</b>	<b>25,060</b>	<b>2,680</b>	<b>12.0%</b>



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
Heitzmann Construction Inc	Construction - Special Trade Contractors	Umatilla	WA	Walla Walla	2001	21
Obrien Tom Construction Co	Building Construction - General Contractors & Operative Builders	Umatilla	WA	King	1993	18
A & B Foods Of Washington Inc	Food Stores	Umatilla	WA	Benton	1990	18
International Farm Sales Inc	Wholesale Trade - Durable Goods	Union	WA	Walla Walla	1997	16
Craft-Mart Inc	Miscellaneous Retail	Umatilla	MO	St. Louis	2004	15
K Wht Fm/K-Wheat	Communications	Umatilla	WA	Walla Walla	1994	15
Landmark Constructors Inc	Building Construction - General Contractors & Operative Builders	Umatilla	WA	Walla Walla	2002	12
Broderic Construction	Construction - Special Trade Contractors	Umatilla	WA	Walla Walla	2001	10
Old Farm Nursery Inc	Wholesale Trade - Nondurable Goods	Umatilla	CO	Jefferson	1991	7
Wind River Inc	Automotive Dealers and Gasoline Service Stations	Union	CO	Grand	1992	7
Meldisco K-M Of Southgate Or	Apparel and Accessory Stores	Umatilla	NJ	Bergen	2000	7
Bridges & Assoc	Business Services	Umatilla	WA	Spokane	2000	7
Suburban Insulation Inc	Business Services	Union	MD	Washington	1996	6
Elegant Kitchen	Home Furniture, Furnishings and Equipment Stores	Umatilla	WA	Snohomish	2000	6
Lawns Plus	Agricultural Services	Umatilla	WA	Walla Walla	1996	5
Richard E Lally Md Pc	Health Services	Umatilla	ID	Canyon	2003	4
Triangle L Western Stores 1	Apparel and Accessory Stores	Umatilla	WA	Walla Walla	1992	4
F & R Sales Inc	Business Services	Umatilla	WA	Spokane	1995	4
Powder River Eagle Studies	Fishing, Hunting, and Trapping	Union	WY	Campbell	2001	4
Suburban Rentals Inc	Business Services	Union	MD	Washington	1996	3
Autotelica Llc	Business Services	Union	VA	Fluvanna	2002	3
Howe Allan Inc Ps	Business Services	Umatilla	WA	Cowlitz	2003	3
Northwest Electric	Construction - Special Trade Contractors	Umatilla	WA	Walla Walla	1999	3
A & B Roofing	Construction - Special Trade Contractors	Umatilla	WA	Clark	2003	3
Star Printing	Printing, Publishing and Allied Industries	Umatilla	WA	Walla Walla	1995	3
Northwest Painting	Construction - Special Trade Contractors	Umatilla	WA	Walla Walla	2002	3
Walla Walla Claims Service	Insurance Agents, Brokers and Service	Union	WA	Walla Walla	1997	3
Creation Trading Company Inc	Wholesale Trade - Durable Goods	Umatilla	CA	Los Angeles	1992	2
Jones & Jones Frames	Lumber and Wood Products, Except Furniture	Umatilla	CA	San Francisco	1993	2
Gregs Custom Gun	Miscellaneous Repair Services	Union	CA	Solano	1991	2
Hoyt Rick	Wholesale Trade - Nondurable Goods	Union	CA	Stanislaus	1991	2
Arrowhead Management Inc	Real Estate	Wallowa	CA	Orange	1991	2
J & J Electric Llc	Construction - Special Trade Contractors	Union	ID	Canyon	2003	2
Fire Works	Home Furniture, Furnishings and Equipment Stores	Wallowa	ID	Ada	2004	2
Back In Time Toys	Wholesale Trade - Durable Goods	Umatilla	NE	Lancaster	2003	2
National Assn Pregnancy Massag	Health Services	Union	TX	Travis	2003	2
Wiomun Feed Co Inc	Food and Kindred Products	Umatilla	WA	Walla Walla	1998	2
Apple Transport	Transportation Equipment	Umatilla	WA	Benton	2003	2
Specialized Systems Sftwr Llc	Home Furniture, Furnishings and Equipment Stores	Umatilla	WA	Walla Walla	2004	2
B&K Farms	Agricultural Production - Crops	Umatilla	WA	Walla Walla	2002	2
Wally World Pc	Home Furniture, Furnishings and Equipment Stores	Umatilla	WA	Walla Walla	2001	2
Family Clothing Center	General Merchandise Stores	Umatilla	WA	Yakima	1995	2
Moran Sheery	Business Services	Umatilla	WA	Walla Walla	2001	2

Buchanan Bruce A Ccim	Engineering, Accounting, Research, Management & Related Svcs	Umatilla	WA	Walla Walla	2003	2
Newark Floor Co	Construction - Special Trade Contractors	Union	CA	Stanislaus	1991	1
Miller Construction	Building Construction - General Contractors & Operative Builders	Wallowa	CA	Placer	1996	1
Keith Sale Trucking	Motor Freight Transportation	Umatilla	ID	Canyon	2000	1
Osborne Leo E	Lumber and Wood Products, Except Furniture	Wallowa	ME	Knox	1991	1
Triple T Trucking	Motor Freight Transportation	Wallowa	MI	Iosco	2003	1
Douglas N Smith	Social Services	Umatilla	MT	Yellowstone	1990	1
Gelona Enterprises	Chemicals and Allied Products	Union	NJ	Atlantic	2003	1
Night Moves Body Art	Personal Services	Umatilla	WA	Klickitat	2004	1
Valley Ag Service	Construction - Special Trade Contractors	Umatilla	WA	Walla Walla	2001	1
Johnston Thomas Dale	Miscellaneous Repair Services	Umatilla	WA	Walla Walla	2003	1
Obrien Worldwide Inc	Building Construction - General Contractors & Operative Builders	Umatilla	WA	King	1993	1
Oster Saddle Co	Leather and Leather Products	Umatilla	WA	Clallam	2003	1
Blackstar Energies Llc	Business Services	Umatilla	WA	Pierce	2002	1
Ecotech Inspection Svcs	Business Services	Umatilla	WA	Walla Walla	2004	1
Mobile Doc	Personal Services	Umatilla	WA	Spokane	2004	1
Cc Security	Business Services	Umatilla	WA	Walla Walla	2003	1
Yarn Basket	Miscellaneous Retail	Umatilla	WA	Skagit	1992	1
Brown Michael E	Miscellaneous Retail	Umatilla	WA	Walla Walla	2001	1
Cc Design	Agricultural Services	Umatilla	WA	King	2002	1
Lyons & Associates	Educational Services	Umatilla	WA	Grays Harbor	2004	1
Deans Automotive	Automotive Repair, Services and Parking	Umatilla	WA	Walla Walla	1999	1
Clark Celia Louise	Health Services	Umatilla	WA	Grant	2003	1
Action Adjusters & Appraisers	Insurance Agents, Brokers and Service	Umatilla	WA	Walla Walla	1998	1
Happy Happy Kings	Food and Kindred Products	Union	WA	Clallam	2003	1
Hagedorn Logging	Lumber and Wood Products, Except Furniture	Union	WA	Walla Walla	1990	1
Bieraugel Gene	Agricultural Services	Wallowa	WA	Snohomish	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
Key Technology Inc	Industrial and Commercial Machinery and Computer Equipment	Umatilla	WA	1991	200
Mut Investment Corporation	Health Services	Umatilla	WA	1995	160
Grande Rhonde Care Corporation	Health Services	Union	WA	1995	75
Ry Timber Inc	Lumber and Wood Products, Except Furniture	Wallowa	CA	1993	70
Eagle Truck & Machine Co	Wholesale Trade - Durable Goods	Union	WA	1999	44
First Student 0396	Engineering, Accounting, Research, Management & Related Svcs	Umatilla	WA	2003	30
Silver Eagle Electrical Contrs	Construction - Special Trade Contractors	Umatilla	WA	2003	20
Oregon Rustics Inc	Furniture and Fixtures	Umatilla	WA	2004	15
Freedom Capital Corporation	Automotive Dealers and Gasoline Service Stations	Umatilla	WA	2004	8
Pringles Power-Vac	Business Services	Umatilla	WA	1997	8
Oregon Trail Internet Inc	Services, Not Elsewhere Classified	Umatilla	WA	2004	8
Pirates Den	Textile Mill Products	Union	UT	2001	6
Caris-Sell Homes	Building Matrials, Hrdwr, Garden Supply & Mobile Home Deals	Umatilla	WA	2002	6
Jefferson Street Depot	Eating and Drinking Places	Union	NV	2003	5
First Intrstate Bnk Of Ore Na	Depository Institutions	Union	OH	1993	5
Mack Specialty Inc	Miscellaneous Retail	Union	UT	2004	5
Beneficial Oregon Inc	Nondepository Credit Institutions	Umatilla	WA	2003	5
Stockmans Tavern	Eating and Drinking Places	Wallowa	AZ	2004	4
Emerys Texaco	Automotive Dealers and Gasoline Service Stations	Union	OH	1993	4
Gs Cattle Co Inc	Agricultural Services	Umatilla	WA	2003	4
Graham Ranch	Hotels, Rooming Houses, Camps, and Other Lodging Places	Umatilla	AZ	2003	3
New Life Fellowship	Membership Organizations	Union	IA	2003	3
Courtesy Easy To Own	Business Services	Umatilla	ID	1997	3
Rocky Mountain Sheep Mar	Wholesale Trade - Nondurable Goods	Union	ID	1990	3
Oak Harbor Freight Lines Inc	Motor Freight Transportation	Union	ID	1997	3
Cycle Life Bike Shop	Miscellaneous Retail	Wallowa	ID	1994	3
Crane V & Sons Inc	Wholesale Trade - Durable Goods	Wallowa	NV	1990	3
Auto Master Repair & Svc	Automotive Repair, Services and Parking	Umatilla	WA	2001	3
All Weather Roofing	Construction - Special Trade Contractors	Umatilla	WA	2003	3
Yale Glass Co Inc	Building Matrials, Hrdwr, Garden Supply & Mobile Home Deals	Umatilla	WA	2001	3
El Toro Express Inc	Agricultural Production - Livestock and Animal Specialties	Umatilla	WA	1995	3
Amerigas Propane Inc	Miscellaneous Retail	Umatilla	WA	1992	3
Mostly Donuts Bakery	Food Stores	Union	WA	2002	3
Sarmentos Place	Social Services	Wallowa	WA	2004	3
Reel Tool And Machine	Industrial and Commercial Machinery and Computer Equipment	Wallowa	CA	1997	2
Marys Flower Garden	Miscellaneous Retail	Umatilla	ID	2004	2
Josis Fire Control	Business Services	Wallowa	ID	2004	2
Stejen Lumber	Building Construction - General Contractors & Operative Builders	Wallowa	ID	1995	2
Reach High	Wholesale Trade - Durable Goods	Union	UT	2002	2
Nibler Harold A & Gary A	Agricultural Production - Crops	Umatilla	WA	2002	2
Stateline Auto Sales	Automotive Dealers and Gasoline Service Stations	Umatilla	WA	2003	2
Burton Construction Inc A	Construction - Special Trade Contractors	Umatilla	WA	2004	2
Jj Page Rentals	Real Estate	Umatilla	WA	2004	2

Campbell Homes Construction	Building Construction - General Contractors & Operative Builders	Union	WA	1994	2
Heritage Home & Garden	Home Furniture, Furnishings and Equipment Stores	Wallowa	WA	2001	2
Jack Crosser Construction	Building Construction - General Contractors & Operative Builders	Union	AK	2003	1
Smith Wayne R	Automotive Dealers and Gasoline Service Stations	Umatilla	AZ	1990	1
Pnw Inspections	Business Services	Union	AZ	2004	1
Jacquelyn Nails	Personal Services	Wallowa	CA	1999	1
Precision Plumbing	Construction - Special Trade Contractors	Wallowa	CO	1999	1
Fiamengo Steven Md	Health Services	Union	GA	2003	1
Elliott Mary Lynn	Miscellaneous Retail	Umatilla	ID	2004	1
Duli Solutions Program	Health Services	Umatilla	MI	2004	1
Otter Space	Amusement and Recreation Services	Union	MT	2003	1
Cavallaro Electric	Construction - Special Trade Contractors	Wallowa	NV	2004	1
Maine Cathy	Miscellaneous Retail	Umatilla	NY	2001	1
Foxys Treasure Den	Miscellaneous Retail	Umatilla	TX	2004	1
Bruni Jeff	Construction - Special Trade Contractors	Umatilla	UT	2001	1
Birthwise Hm Birth Alternative	Health Services	Umatilla	WA	1999	1
Hoelt Ed	Agricultural Production - Crops	Umatilla	WA	2003	1
Huffman Ethel	Agricultural Production - Crops	Umatilla	WA	2000	1
Weber Weber & Associates	Business Services	Umatilla	WA	2003	1
A Pet Pantry	Miscellaneous Retail	Umatilla	WA	2002	1
Bromps Robert	Agricultural Production - Crops	Umatilla	WA	2003	1
Modern Floors Inc	Home Furniture, Furnishings and Equipment Stores	Umatilla	WA	1992	1
Krocs Carwashes	Food Stores	Umatilla	WA	1990	1
Arrow Auto Body	Automotive Repair, Services and Parking	Umatilla	WA	2004	1
Paperback Exchange	Textile Mill Products	Umatilla	WA	2002	1
Young Roger S	Construction - Special Trade Contractors	Umatilla	WA	2003	1
Posey Bob S	Construction - Special Trade Contractors	Union	WA	2002	1
Jones Doug	Agricultural Production - Crops	Union	WA	2001	1
Bbr Inc	Hotels, Rooming Houses, Camps, and Other Lodging Places	Union	WA	2003	1
Driggers Don	Construction - Special Trade Contractors	Union	WA	2001	1
Kolbaba Kyle	Motor Freight Transportation	Wallowa	WA	2001	1
Monument Crushing & Earth Mvg	Mining and Quarrying of Nonmetallic Minerals, Except Fuels	Wallowa	WA	2003	1
Blue Yonder	Miscellaneous Retail	Wallowa	WI	2001	1
Country Chiropractic Clinic	Health Services	Union	OH	1993	

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