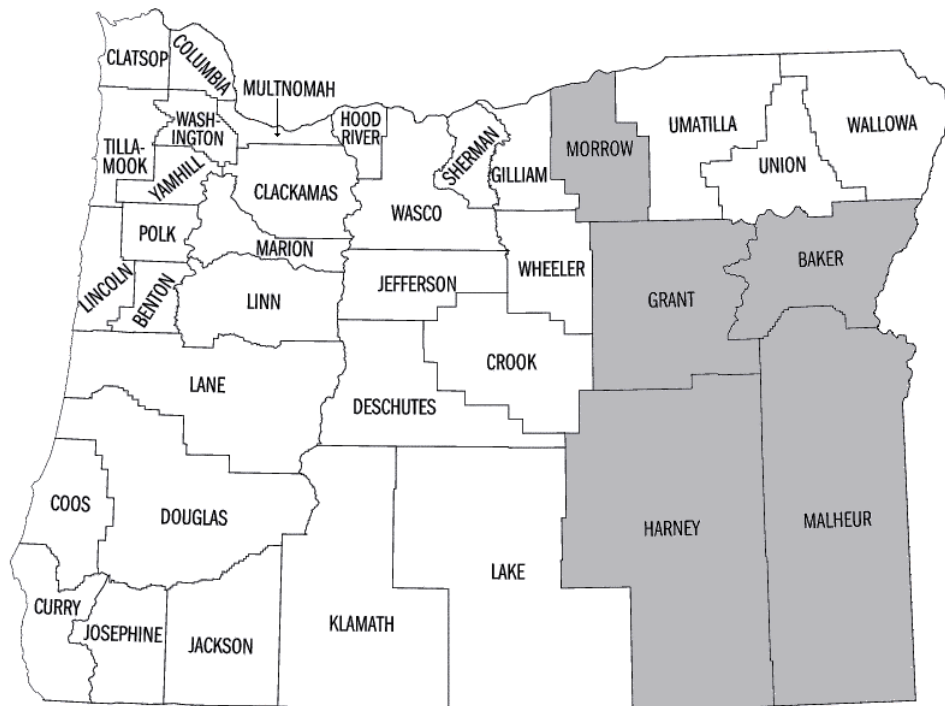


OREGON
ECONOMIC & COMMUNITY DEVELOPMENT DEPARTMENT

Regional Analysis
Baker, Grant, Harney, Malheur and Morrow Counties

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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 Baker, Grant, Harney, Malheur and Morrow 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 (19,403) accounts for 1.4% of private sector employment in Oregon (1.4 million).
- Malheur, Baker and Morrow counties account for 84% of regional employment.
- Employment growth for the region was below the state average.
- Grant, Harney and Malheur counties all experienced negative employment growth between 2004 and 2006.
- Average private sector wages in the region (\$25,875) are 31% lower than the state average wage of \$37,703.

Interstate Business Moves

- The region was a net exporter of businesses establishments between 1990 and 2004.
- The region had a net gain of business from California and Utah.
- The region had a net loss of business establishments that moved to Idaho, Arizona, Nevada and Texas.
- Trade and service industries accounted for the largest share of net moves to the region.
- The region had a net loss of 5 establishments in Eating & Drinking Places and Health Services.

Population and Age Demographics

- Population growth in Baker, Grant, Harney and Malheur counties was below the state average of 3% between 2004 and 2006.
- Baker, Grant and Malheur counties had population declines between 2004 and 2006.
- The region has a larger share of retirement workers (19%) than the state average of 17%.
- In all sectors of the region, the share of retirement age workers is between 2% and 8% above the state average.
- Two thirds of the regions sectors have 20% or more of their workers in retirement age.

Competitive Industries

- The region has 27 industries that met at least one of the competitiveness criteria¹
- Of the 27 competitive industries, 19 are projected to grow by 2016.
- Ten of the competitive industries are projected to grow faster than the regional average.
- Twelve of the competitive industries have average wages above the regional average.
- Animal Production, Social Assistance, and General Merchandise stores are the only industries where average wages AND employment growth exceed the 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%.

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 Baker, Grant, Harney, Malheur and Morrow 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 Baker, Grant, Harney, Malheur and Morrow counties accounts for 1.4% of Oregon's private sector employment
- Average wages in the region are 31% lower than the state's private sector average wage
- Malheur, Baker and Morrow counties account for 84% of the region's private sector employment
- Morrow County's private sector average wage is above the regional average

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

Area	Est.	Employment	Average Wage	% of Region Employment	% of Region Avg. Wage
Baker	586	4,122	\$24,762	21%	96%
Grant	292	1,624	\$24,656	8%	95%
Harney	219	1,478	\$23,728	8%	92%
Malheur	865	9,137	\$24,708	47%	95%
Morrow	244	3,042	\$32,582	16%	126%
Region	2,206	19,403	\$25,875	100%	100%
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 growth in all the region's counties trailed the state's employment growth rate from 2004 to 2006.
- The region's counties were in the bottom half of all Oregon counties (36) in employment growth for the period.
- Grant, Harney and Malheur counties all experienced negative employment growth.
- Harney County's employment decline was the second largest of all Oregon counties.
- Baker, Grant and Malheur counties experienced population declines between 2004 and 2006.

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

Area	Employment	Population	Emp. Growth Rank	Pop. Growth Rank
Baker	2.5%	-0.5%	25	33
Grant	-5.1%	-1.5%	35	35
Harney	-0.4%	0.3%	32	27
Malheur	-0.8%	-0.4%	33	32
Morrow	3.0%	3.2%	23	6
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.
- On net, 31 establishments left the region for Idaho.
- The region had a net gain of 7 establishments from California.

Table 3. Top Feeder States (1990-2004)

State	Net Est. Gain
California	7
Utah	2

Table 4. Top Stealer States (1990-2004)

State	Net Est. Loss
Idaho	-31
Arizona	-4
Nevada	-4
Texas	-4

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

- The region gained 4 establishments that sell Home Furniture, Furnishings, & Equipment.
- Trade and service industries accounted for the largest share of net, out-of-state moves into the region.

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

Industry	Move In	Move Out	Net Change
Home Furniture, Furnishings and Equipment Stores	4	0	4
Wholesale Trade - Durable Goods	3	1	2
Miscellaneous Repair Services	4	2	2
Services, Not Elsewhere Classified	2	0	2
Agricultural Production - Livestock and Animal Specialties	6	5	1
Forestry	1	0	1
Heavy Construction, Except Building Construction - Contractors	1	0	1
Construction - Special Trade Contractors	6	5	1
All	61	97	-36

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

- The region had a net loss of 5 establishments in Eating & Drinking Places and Health Services.
- Trade and construction industries accounted for the largest share of net moves out of the region.

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

Industry	Move In	Move Out	Net Change
Eating and Drinking Places	0	5	-5
Health Services	1	6	-5
Building Construction - General Contractors & Operative Builders	0	4	-4
Wholesale Trade - Nondurable Goods	2	6	-4
Building Materials, Hrdwr, Garden Supply & Mobile Home Dealers	0	4	-4
Agricultural Production - Crops	0	3	-3
Food Stores	0	3	-3
Automotive Repair, Services and Parking	0	3	-3
All	61	97	-36

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

Age Demographics by Industry

- The region has a larger share of retirement age workers (19%) than the state average.
- Within each industry, the region has a larger share of retirement age workers than each industry's state average.
- In two thirds of the region's industries, over twenty percent of workers are at retirement age.

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%	853	132	15%
Educational and Health Services	205,443	41,376	20%	2,628	597	23%
Financial Activities	89,086	16,137	18%	828	164	20%
Information	34,853	4,823	14%	291	60	21%
Leisure and Hospitality	164,490	17,096	10%	2,424	272	11%
Manufacturing	203,499	33,994	17%	3,446	713	21%
Natural Resources and Mining	48,201	10,118	21%	2,936	635	22%
Other Services	61,801	13,418	22%	760	197	26%
Professional and Business Services	98,476	17,325	18%	521	110	21%
Retail Trade	203,439	30,352	15%	4,214	684	16%
Transportation and Utilities	52,954	11,311	21%	895	211	24%
Wholesale Trade	84,563	14,420	17%	1,169	217	19%
All	1,347,249	223,868	17%	20,965	3,992	19%

Source: Oregon Employment Department, Local Employment Dynamics

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

Section 3: Regional Competitive Industries

- Of the 55 reportable (non-confidential data) 3-digit NAICS industries in the region, 27 met at least one of the competitiveness criteria.
- Employment in these industries accounts for 44% of private employment in the region.
- Crop Production was the only industry in the region to meet all three competitiveness criteria.
- The region's employment concentration in Animal Production is more than eleven times the concentration in the state as a whole.
- The region's employment concentration in Crop Production and Agriculture & Forestry Support Activities is more than three times the concentration in 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	Diff. Growth Rate	# of Criteria Met
111	Crop Production	87	1,122	\$25,796	3.05	140%	31%	***
311	Food Manufacturing	21	793	\$35,473	2.65	128%	0%	**
115	Agriculture And Forestry Support Activities	54	687	\$21,436	5.25	109%	3%	**
452	General Merchandise Stores	14	671	\$21,255	1.34	112%	-1%	**
445	Food And Beverage Stores	38	664	\$17,456	1.31	91%	-31%	*
721	Accommodation	53	558	\$12,756	1.93	83%	-9%	*
424	Merchant Wholesalers, Nondurable Goods	54	549	\$25,762	1.30	60%	-31%	*
441	Motor Vehicle And Parts Dealers	46	539	\$33,882	1.45	95%	-3%	*
112	Animal Production	52	481	\$26,907	11.44	119%	-3%	**
541	Professional And Technical Services	111	473	\$27,741	0.51	59%	157%	*
447	Gasoline Stations	37	421	\$15,366	2.84	104%	-13%	**
624	Social Assistance	48	308	\$19,736	0.88	107%	-16%	*
444	Building Material And Garden Supply Stores	39	298	\$23,381	1.40	89%	7%	*
321	Wood Product Manufacturing	11	200	\$36,991	0.46	109%	-56%	*
113	Forestry And Logging	42	157	\$31,830	1.52	90%	-1%	*
446	Health And Personal Care Stores	18	125	\$26,549	1.22	110%	14%	*
561	Administrative And Support Services	53	120	\$19,958	0.10	93%	345%	*
221	Utilities	21	94	\$55,174	1.45	92%	-58%	*
524	Insurance Carriers And Related Activities	48	74	\$26,074	0.22	59%	60%	*
517	Telecommunications	19	58	\$51,462	0.52	101%	129%	**
551	Management Of Companies And Enterprises	6	54	\$41,309	0.14	69%	65%	*
814	Private Households	29	44	\$13,981	0.82	103%	-69%	*
488	Support Activities For Transportation	10	36	\$21,703	0.36	59%	45%	*
562	Waste Management And Remediation Services	9	28	\$38,750	0.39	106%	0%	*
327	Nonmetallic Mineral Product Manufacturing	8	22	\$26,529	0.30	71%	40%	*
999	Unclassified	8	14	\$21,413	1.52	55%	1315%	**
333	Machinery Manufacturing	8	10	\$19,790	0.06	42%	53%	*

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 27 competitive industries in the region, 19 are projected to grow between 2006 and 2016.
- Ten of the competitive industries are projected to grow faster than the regional average of 12.0%.

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

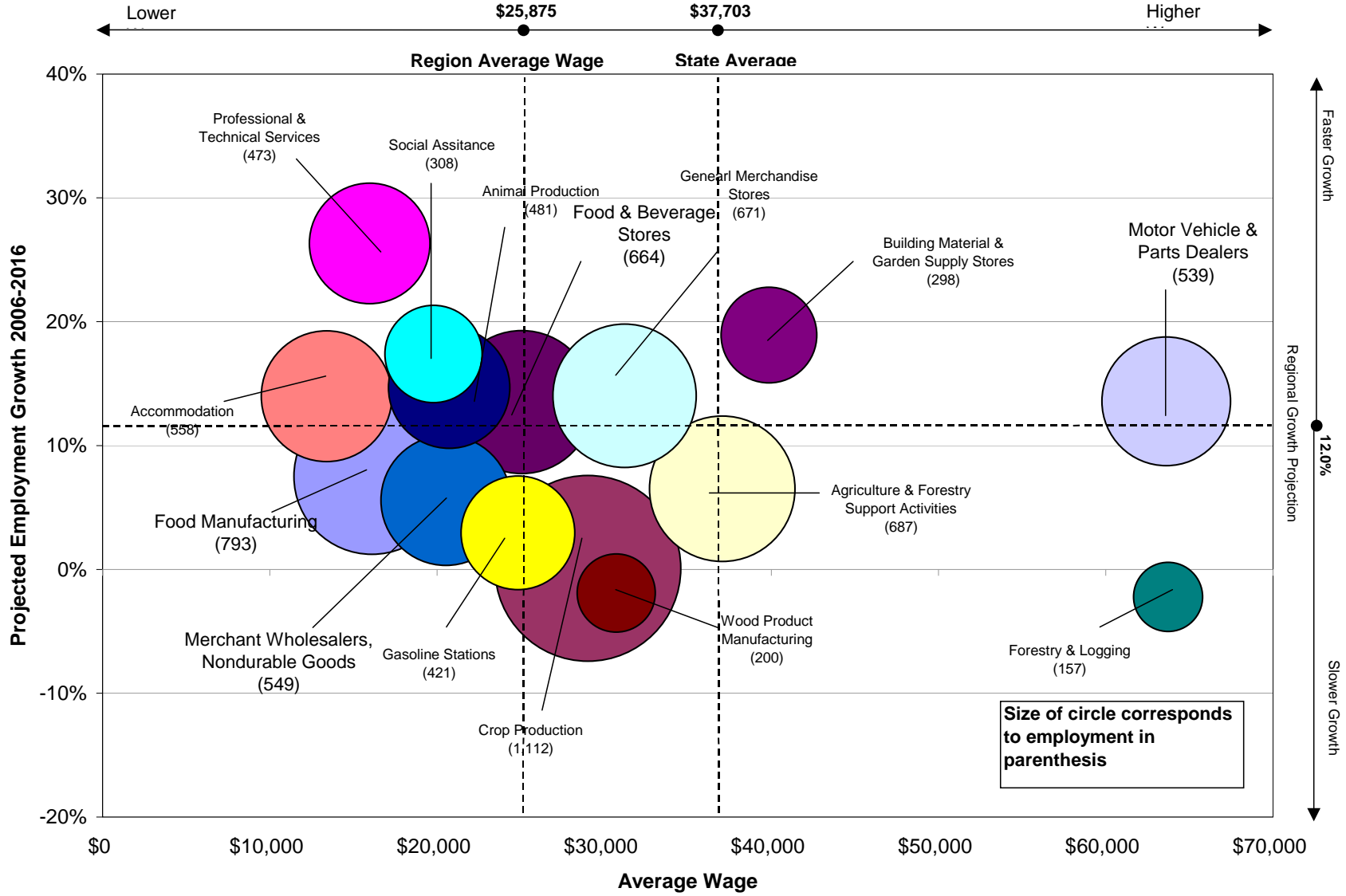
NAICS	Industry	2006	2016	Change	% Change
541	Professional And Technical Services	1,258	1,589	331	26.3%
488	Support Activities For Transportation	52	63	11	21.2%
444	Building Material And Garden Supply Stores	740	880	140	18.9%
624	Social Assistance	598	702	104	17.4%
112	Animal Production	150	172	22	14.7%
452	General Merchandise Stores	1,049	1,196	147	14.0%
721	Accommodation	1,130	1,288	158	14.0%
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%
524	Insurance Carriers And Related Activities	390	442	52	13.3%
446	Health And Personal Care Stores	317	348	31	9.8%
311	Food Manufacturing	2,413	2,594	181	7.5%
115	Agriculture And Forestry Support Activities	1,617	1,722	105	6.5%
424	Merchant Wholesalers, Nondurable Goods	1,257	1,327	70	5.6%
327	Nonmetallic Mineral Product Mfg.	278	293	15	5.4%
333	Machinery Manufacturing	66	68	2	3.0%
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%
517	Telecommunications	n/a	n/a	n/a	n/a
551	Management Of Companies And Enterprises	n/a	n/a	n/a	n/a
561	Administrative And Support Services	n/a	n/a	n/a	n/a
562	Waste Management & Remediation Services	n/a	n/a	n/a	n/a
814	Private Households	n/a	n/a	n/a	n/a
999	Unclassified	n/a	n/a	n/a	n/a
n/a	Total	40,319	45,163	4,844	12.0%

↑ Faster than Region Average
 ● Projected Employment Growth
 ↓

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	Move Year	Move Emp
Pathway Hospice Inc	Health Services	Malheur	ID	1997	20
Wood By Design Inc	Construction - Special Trade Contractors	Malheur	ID	2000	15
West Coast Properties	Wholesale Trade - Durable Goods	Malheur	CA	1997	14
Ontario Roofing Co Inc	Construction - Special Trade Contractors	Malheur	ID	2000	13
Midway Farms Custom Serv	Agricultural Services	Malheur	WA	1998	10
Gem Electric Company Inc	Home Furniture, Furnishings and Equipment Stores	Malheur	ID	1997	8
Creative Choice School Sup Co	Miscellaneous Retail	Malheur	ID	1998	8
Gem Electric Company Inc	Home Furniture, Furnishings and Equipment Stores	Malheur	ID	1998	8
Meldisco K-M Of E Idaho Ave Or	Apparel and Accessory Stores	Malheur	NJ	2000	7
Masingill Furniture & App	Home Furniture, Furnishings and Equipment Stores	Malheur	ID	2001	6
Coys Jewelry Repair	Miscellaneous Repair Services	Malheur	ID	2002	5
Idaho Concrete Company Inc	Stone, Clay, Glass, and Concrete Products	Malheur	ID	1996	5
Colkitt Incorporated	Automotive Dealers and Gasoline Service Stations	Baker	OH	1995	5
Bach Charles E Inc	Motor Freight Transportation	Baker	CO	1990	4
Cheney Land Leveling Inc	Heavy Construction, Except Building Construction - Contractors	Malheur	ID	1993	4
Island Jewelers	Miscellaneous Retail	Malheur	WA	1999	4
Clover Wholesale	Wholesale Trade - Nondurable Goods	Malheur	ID	1999	3
Cliffs Ranch Inc	Agricultural Production - Livestock and Animal Specialties	Malheur	ID	2000	3
Gibson Glen	Insurance Carriers	Malheur	ID	1996	3
Baxter Grant State Farm Insur	Insurance Agents, Brokers and Service	Malheur	ID	1998	3
Foss Wayne H	Business Services	Grant	WI	2004	3
Elphick Masonry	Construction - Special Trade Contractors	Baker	CA	2004	2
Anderson Ra Custom Pliers	Miscellaneous Repair Services	Grant	CA	1994	2
Claasen Ray Welding Service	Construction - Special Trade Contractors	Malheur	CA	1990	2
Ervines Guns	Miscellaneous Retail	Malheur	CA	1992	2
Mcginnis Ranch Kennels	Agricultural Production - Livestock and Animal Specialties	Baker	ID	1995	2
Roes Ladies Shop	Apparel and Accessory Stores	Malheur	ID	1993	2
Rocking R Campers	Transportation Equipment	Malheur	ID	1992	2
Tomjack Equipment Sales Co	Personal Services	Malheur	ID	1991	2
Curtis Enterprises	Business Services	Malheur	ID	1990	2
Eldredge Clothing Company	Apparel and Accessory Stores	Malheur	ID	1994	2
Country Kids Chld Care&Presch	Social Services	Morrow	ID	2003	2
Stipe Douglas	Agricultural Production - Livestock and Animal Specialties	Malheur	MT	2000	2
Utah Atv Guide	Transportation Equipment	Malheur	UT	2002	2
Kysar Tree Farm Management	Forestry	Baker	WA	1994	2
North Pacific Engineering Inc	Fabricated Metal Products, Except Machinery & Transportation Equipment	Morrow	WA	1992	2
Scottco Distributers	Wholesale Trade - Durable Goods	Malheur	AZ	1991	1
Top Drawer Window Cleaning	Business Services	Grant	CA	2003	1
Stf Painting	Construction - Special Trade Contractors	Malheur	CA	2004	1
Graydons	Miscellaneous Repair Services	Malheur	CA	1994	1
Ackerman Business Service	Engineering, Accounting, Research, Management & Related Svcs	Malheur	CA	2001	1
Christopher April Photography	Personal Services	Morrow	CA	2004	1
Andrew Bryan Cep	Engineering, Accounting, Research, Management & Related Svcs	Baker	ID	2003	1
Branstetter Oscar	Agricultural Production - Livestock and Animal Specialties	Grant	ID	2003	1
B & E Wholesale	Wholesale Trade - Nondurable Goods	Malheur	ID	1996	1
Marks Appliance Service	Miscellaneous Repair Services	Malheur	ID	2001	1
Goldthorpe Llc	Apparel and Accessory Stores	Malheur	ID	2004	1

Lo Ranch	Agricultural Production - Livestock and Animal Specialties	Malheur	ID	2004	1
Oldiesbutgoodies Antiques	Miscellaneous Retail	Malheur	ID	2004	1
Judys Cleaning Service	Business Services	Malheur	ID	2004	1
Comfort Specialist Upholstery	Home Furniture, Furnishings and Equipment Stores	Malheur	ID	1999	1
Agrilands Real Estate	Real Estate	Malheur	ID	2004	1
See & Save Furniture	Miscellaneous Retail	Malheur	ID	1995	1
Gollobit Beverly	Business Services	Malheur	MO	2003	1
Aspen Digital Services	Services, Not Elsewhere Classified	Baker	UT	2003	1
Murray Richard Studio	Services, Not Elsewhere Classified	Baker	UT	2001	1
Herron Dennis Farm	Agricultural Production - Livestock and Animal Specialties	Baker	WA	2000	1
Gemco Corp	Wholesale Trade - Durable Goods	Baker	WA	1994	1
Ultrasonic Predictable Maint	Business Services	Morrow	WA	1995	1
Star Creek Arabians	Agricultural Services	Morrow	WA	2004	1
Don Buckner Floor Covering	Construction - Special Trade Contractors	Morrow	WA	1995	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
Oregon Potato Company	Food and Kindred Products	Morrow	WA	2002	125
Osvaldo Gonzalez	Agricultural Services	Malheur	TX	2002	65
Red Apple Inc	Food Stores	Malheur	ID	1993	62
Mcdonalds/Hines	Eating and Drinking Places	Harney	TX	2000	25
Gem Communications	Miscellaneous Retail	Malheur	ID	2002	22
Idaho Intermountain Claims	Insurance Agents, Brokers and Service	Malheur	ID	1990	17
Fruitland Electric	Construction - Special Trade Contractors	Malheur	ID	1995	13
Baker Aircraft Inc	Transportation by Air	Baker	AZ	2002	10
Anderson D B Inc	Wholesale Trade - Nondurable Goods	Malheur	ID	1990	10
Creative Choice School Sup Co	Miscellaneous Retail	Malheur	ID	1993	9
General Minerals Corp	Metal Mining	Baker	AZ	1994	8
Zimmerman Plumbing & Heating	Construction - Special Trade Contractors	Malheur	ID	2002	8
Grant Petroleum Inc	Wholesale Trade - Nondurable Goods	Malheur	ID	1992	8
Isom Waldon E Dds	Health Services	Malheur	ID	1997	8
First United Financial	Engineering, Accounting, Research, Management & Related Svcs	Malheur	ID	1996	8
Grizzly Adams Productions Inc	Motion Pictures	Baker	NV	2001	7
Spatial Dynamics Inc	Mesr/ Anlyz/ Cntrl Instrmnts; Photo/Med/Opt Gds; Watches/Clocks	Baker	WA	1993	7
Heppner Bowl	Eating and Drinking Places	Morrow	WA	1993	7
Bear Creek Woodworks	Fabricated Metal Products, Except Machinery & Transportation Equipment	Baker	ID	2001	6
Tuttle Steven	Construction - Special Trade Contractors	Malheur	ID	2001	6
Dahlin Jan O Md	Health Services	Malheur	ID	2004	6
Kido Brothers Export Inc	Wholesale Trade - Nondurable Goods	Malheur	ID	1998	5
John E Chen	Health Services	Malheur	ID	1992	5
Treasure Vly Drmtlogy Clnic Pc	Health Services	Malheur	ID	2002	5
Traditions	Miscellaneous Retail	Malheur	ID	2001	5
S T Investments	Automotive Dealers and Gasoline Service Stations	Malheur	ID	1998	5
Ten Mile Ranch Llc	Agricultural Production - Livestock and Animal Specialties	Malheur	NV	2003	5
Valley Homes & Metal Buildings	Building Construction - General Contractors & Operative Builders	Malheur	ID	1993	4
Miss Sallys Gentlemans Club	Amusement and Recreation Services	Malheur	ID	2002	4
Ferdinands Pizza	Food Stores	Malheur	ID	1999	4
B-Hines Management & Sales Cor	Miscellaneous Retail	Harney	WA	2003	4
Pine Eagle Farmers Coop Assn	Wholesale Trade - Nondurable Goods	Baker	AR	1993	3
Lundgren /Larson & Associ	Engineering, Accounting, Research, Management & Related Svcs	Baker	ID	1990	3
Sandys Bake Shop	Food Stores	Harney	ID	1999	3
Oltman Marlin R	Building Construction - General Contractors & Operative Builders	Malheur	ID	2001	3
Atlas Welding Specialties	Industrial and Commercial Machinery and Computer Equipment	Malheur	ID	2004	3
Action Truck Brokerage	Transportation Services	Malheur	ID	1998	3
Childrens Exchange	Miscellaneous Retail	Malheur	ID	1991	3
Taurus Industries & Const	Building Construction - General Contractors & Operative Builders	Malheur	ID	1991	3
Eldredges Mens Store	Apparel and Accessory Stores	Malheur	ID	1993	3
Dukes Septic Tanks	Construction - Special Trade Contractors	Malheur	ID	1999	3
Preferred Properties Inc	Real Estate	Malheur	ID	1997	3
Gilmores Quality Meats	Food and Kindred Products	Malheur	ID	2001	3

Tools Inc	Building Matrials, Hrdwr, Garden Supply & Mobile Home Deals	Malheur	ID	1999	3
Zoon Harvey & Son Logging Co	Lumber and Wood Products, Except Furniture	Baker	MT	1994	3
Mobile Glass Inc	Automotive Repair, Services and Parking	Grant	NV	2004	3
Brent Woodfield	Health Services	Malheur	UT	1991	3
Eastside Laundry Inc	Personal Services	Malheur	WA	2004	3
Craft N Son Cleaning	Business Services	Malheur	AZ	2002	2
Oregon Trail Miniature Golf	Amusement and Recreation Services	Baker	CA	2002	2
Dorn Enterprises	Agricultural Production - Crops	Malheur	CA	2003	2
Barber Joe	Agricultural Production - Livestock and Animal Specialties	Baker	ID	2002	2
Hells Canyon Boot Mfg	Leather and Leather Products	Baker	ID	1999	2
North Bay Enterprises Inc	Apparel and Accessory Stores	Baker	ID	1999	2
Mindys Uniforms N Such	Apparel and Accessory Stores	Malheur	ID	1993	2
Brown Richard	Agricultural Production - Crops	Malheur	ID	2002	2
Evans Cattle Co	Agricultural Services	Malheur	ID	2003	2
Bangkok House Thai Restaurant	Eating and Drinking Places	Malheur	ID	2003	2
New Generation Enterprises	Apparel and Accessory Stores	Malheur	ID	1991	2
Cascade Auto Glass Inc	Automotive Repair, Services and Parking	Malheur	ID	2004	2
Zurfluh Anton	Wholesale Trade - Nondurable Goods	Malheur	ID	2003	2
Rollins Farm	Agricultural Production - Crops	Malheur	ID	2002	2
Lindsay Will	Miscellaneous Retail	Malheur	ID	1995	2
Creative Funding Rescorses	Engineering, Accounting, Research, Management & Related Svcs	Malheur	ID	2004	2
Gomersall Greg Saddlery	Miscellaneous Retail	Malheur	ID	2004	2
Redlin Photography	Personal Services	Malheur	ID	1991	2
Integrity Glass	Miscellaneous Repair Services	Malheur	ID	2004	2
Snake River Overhead Door	Building Matrials, Hrdwr, Garden Supply & Mobile Home Deals	Malheur	ID	1991	2
Thos Iseri Produce Co	Miscellaneous Repair Services	Malheur	ID	2000	2
Interstate Pest Control	Business Services	Malheur	ID	1990	2
Pleasant View Adult Fster Care	Social Services	Malheur	ID	2002	2
Royal Cafe	Eating and Drinking Places	Baker	LA	2002	2
Reed Enterprises Inc	Hotels, Rooming Houses, Camps, and Other Lodging Places	Harney	MO	2002	2
Loring Ranches Llc	Wholesale Trade - Nondurable Goods	Malheur	NE	2004	2
Pig Iron	Automotive Repair, Services and Parking	Morrow	SD	1991	2
Griffith Strategic Enterprises	Engineering, Accounting, Research, Management & Related Svcs	Baker	WA	2001	2
Sinkbeil James	Agricultural Production - Livestock and Animal Specialties	Baker	WA	2001	2
Steven E Ellis	Health Services	Malheur	AK	1992	1
Davis Homes Ltd	Building Matrials, Hrdwr, Garden Supply & Mobile Home Deals	Baker	AZ	1991	1
Scoop N Snoop	Eating and Drinking Places	Baker	AZ	2004	1
Loft The	Apparel and Accessory Stores	Baker	CA	2002	1
Romans Ranches	Agricultural Production - Livestock and Animal Specialties	Malheur	IA	2002	1
Waymire & Associates	Business Services	Baker	ID	2003	1
Rainbow Eagle Transportation	Transportation Equipment	Malheur	ID	1999	1
Bertalotto Dean	Insurance Agents, Brokers and Service	Malheur	ID	2001	1
Tree House Ldscpg & Lawn Svc	Agricultural Services	Malheur	ID	2004	1
Sands Dick Enterprises	Business Services	Malheur	ID	2001	1
Snake River Overhead Door	Building Matrials, Hrdwr, Garden Supply & Mobile Home Deals	Malheur	ID	1991	1
Hair Haven	Personal Services	Malheur	ID	2001	1
New York Life Insurance Co	Insurance Carriers	Malheur	ID	1993	1

Block Jameson M	Construction - Special Trade Contractors	Malheur	ID	2004	1
Atwood Construction	Building Construction - General Contractors & Operative Builders	Malheur	ID	1993	1
Barker Ranch	Agricultural Production - Livestock and Animal Specialties	Baker	NV	2003	1
Mccombs Enterprises	Business Services	Morrow	TN	2004	1
E N W C Llc	Agricultural Services	Malheur	TX	2004	1
J & H Rock Shop	Wholesale Trade - Durable Goods	Malheur	TX	2003	1
Ramirez Antonio M	Motor Freight Transportation	Morrow	WA	2002	1

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