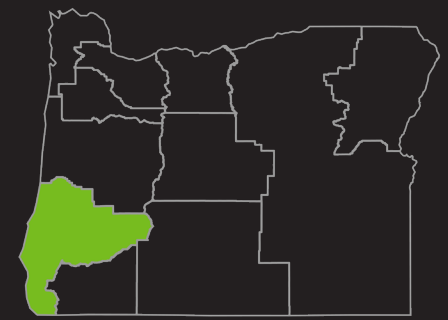


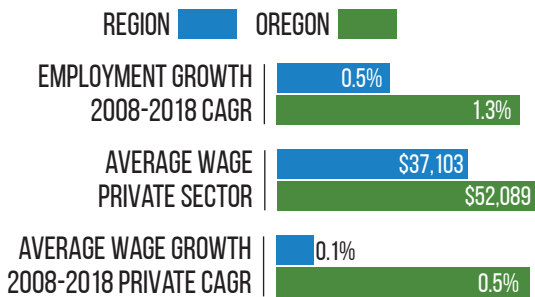
# REGIONAL COMPETITIVE INDUSTRIES

## Coos, Curry, and Douglas Counties



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### PRIVATE SECTOR: EMPLOYMENT GROWTH, AVERAGE WAGE & AVERAGE WAGE GROWTH

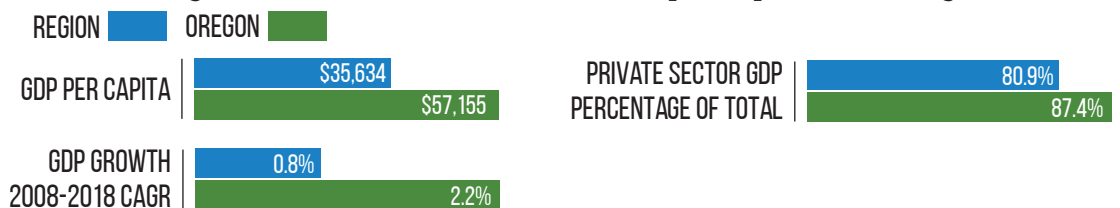


Private sector employment growth, average wage, and average wage growth in the region trailed statewide averages between 2008 and 2018. Annualized employment growth was 0.5 percent compared to 1.3 percent statewide. Average wage was 29 percent lower than the state, and average wage growth was only 0.1 percent annualized compared to 0.5 percent statewide.

### GDP: GROSS DOMESTIC PRODUCT

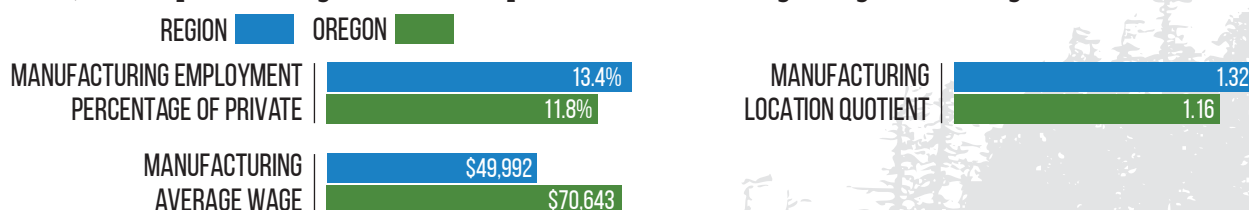
GDP and productivity growth lag behind other regions in the state.

GDP per capita, private sector GDP, and GDP growth in the region all trail statewide averages. GDP per capita is 38 percent lower than the state and private sector GDP is 7 percent lower. Annualized GDP growth in the region between 2008 and 2018 was 0.8 percent, about one-third the growth rate of the state. The region ranks last in the state in GDP per capita and GDP growth.



### MANUFACTURING

Manufacturing is very important to the region's economy, with 13.4 percent of jobs in the region, compared to 11.8 percent statewide. With a location quotient of 1.32, manufacturing in the region is 32 percent larger than average in the U.S., and is very important to the region's competitive advantages. Manufacturing had an average wage of \$49,992 in 2018, much lower than the industry average in the state, but 35 percent higher than the private sector average wage in the region.



# REGIONAL COMPETITIVE INDUSTRIES: COOS, CURRY, AND DOUGLAS COUNTIES

Figure 1

## MOST COMPETITIVE TRADED SECTOR INDUSTRIES

2018 Private Sector Employment

Location Quotient = Employment Concentration in Region Relative to U.S. Average  
LQ of 1.0 = Same Size as U.S., LQ of 2.0 = Twice as Large as U.S., etc.

Industry	Employment	Location Quotient	Average Wage
<b>Forestry &amp; Wood Products</b>			
Plywood and engineered wood product mfg.	2,560	72.14	\$50,810
Logging	1,464	68.58	\$47,055
Support activities for forestry	472	60.16	\$52,403
Sawmills	1,736	43.10	\$59,975
Timber tract operations	51	39.83	\$94,415
Other wood product manufacturing	243	2.41	\$33,709
Nonmetallic mineral mining and quarrying	152	3.58	\$61,943
Household and institutional furniture mfg.	184	1.70	\$46,289
<b>Agriculture &amp; Food</b>			
Fishing	97	33.65	\$67,352
Seafood product preparation and packaging	241	16.00	\$30,528
Fruit and tree nut farming	212	2.64	\$27,996
Dairy product manufacturing	167	2.60	\$68,948
Cattle ranching and farming	114	1.64	\$35,159
Support activities for crop production	183	1.24	\$24,157
Beverage manufacturing	142	1.23	\$34,203
<b>Machinery &amp; Transportation Equipment</b>			
Commercial and service industry machinery mfg.	417	10.37	\$53,595
Ship and boat building	417	6.91	\$61,299
Industrial machinery manufacturing	93	1.79	\$56,580
<b>Tourism</b>			
RV parks and recreational camps	112	3.75	\$16,952
Traveler accommodation	1,625	1.92	\$23,682
Museums, historical sites, zoos, and parks	107	1.47	\$28,120
<b>Business Services</b>			
Business support services	925	2.37	\$25,491
Other professional and technical services	394	1.22	\$43,289

Source: Business Oregon, with data from U.S. Bureau of Labor Statistics, U.S. Census Bureau, and Oregon Employment Department.

The region's largest and most competitive industry group is forestry and wood products. Location quotients, a measure of industry concentration, help reveal competitive industries in the region (Figure 1).

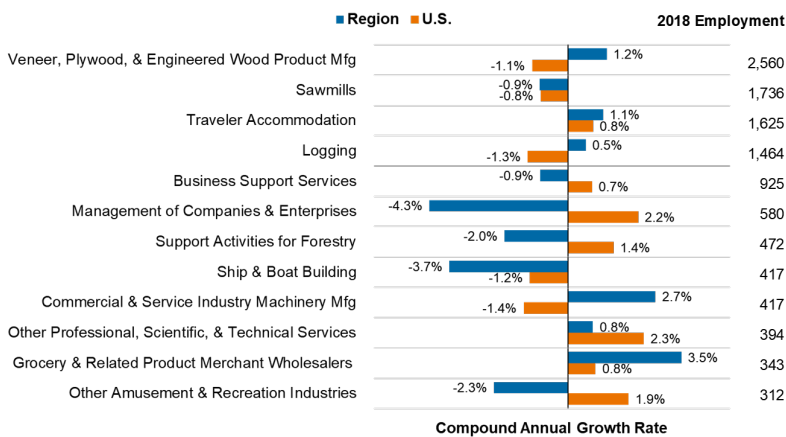
Within forestry and wood products, the most competitive industries are plywood and engineered wood products, logging, support activities for forestry, and sawmills. Other competitive industry groups include agriculture and food, machinery and transportation equipment, tourism, and business services. Tourism, fishing, seafood products, and ship and boat building are particularly important to the region's coastal economy.

Forestry and wood products is the dominant competitive industry group in the region, but maintaining competitiveness remains challenging.

Maintaining competitiveness of some large traded sector industries in the region has been a challenge over the past ten years. One way to measure gains and losses in competitiveness is to compare regional industry trends to national industry trends (Figure 2). From this perspective, plywood and engineered wood products and logging have added jobs and competitiveness, while sawmills and support activities for forestry have lost jobs and competitiveness. Business support services (mainly call centers) has lost jobs and competitiveness, as has management of companies and ship and boat building. Large gains in jobs and competitiveness occurred in commercial and service industry machinery manufacturing and grocery and related product merchant wholesalers. Emerging competitive opportunities also exist in agriculture and food, where fruit and tree nut farming and support activities for crop production have added jobs and competitiveness over the past ten years.

Figure 2

## EMPLOYMENT CHANGE OF LARGEST TRADED SECTOR INDUSTRIES, 2008-2018



Source: Business Oregon, with data from U.S. Bureau of Labor Statistics, U.S. Census Bureau, and Oregon Employment Department.

Source: Business Oregon with data from U.S. Bureau of Economic Analysis, Bureau of Labor Statistics, U.S. Census Bureau, and Oregon Employment Department