

REGIONAL COMPETITIVE INDUSTRIES: JACKSON AND JOSEPHINE 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
Forestry & Wood Products			
Support activities for forestry	1,690	112.59	\$40,012
Plywood and engineered wood product mfg.	1,740	25.66	\$52,777
Timber tract operations	38	15.45	\$45,575
Logging	444	10.88	\$53,257
Other wood product manufacturing	787	4.07	\$36,927
Household and institutional furniture mfg.	778	3.76	\$41,501
Sawmills	128	1.67	\$63,355
E-Commerce, Wholesale Trade, & Logistics			
Electronic shopping and mail-order houses	2,668	8.00	\$37,631
Freight transportation arrangement	435	2.30	\$65,370
Misc. durable goods merchant wholesalers	411	1.65	\$39,561
Agriculture, Food, & Beverages			
Other crop farming	684	13.02	\$34,011
Fruit and vegetable preserving and specialty mfg.	907	6.33	\$37,953
Fruit and tree nut farming	547	3.56	\$28,507
Beverage manufacturing	349	1.58	\$29,787
Support activities for animal production	40	1.57	\$19,660
Other food manufacturing	282	1.51	\$33,155
Tourism			
Performing arts companies	529	5.02	\$42,095
Chemicals			
Other chemical product and preparation mfg.	270	3.84	\$62,338
Paint, coating, and adhesive manufacturing	135	2.58	\$58,738
Basic chemical manufacturing	241	1.92	\$57,290
Transportation Equipment			
Other transportation equipment mfg.	83	2.95	\$68,822
Aerospace product and parts manufacturing	605	1.44	\$83,049
Ship and boat building	164	1.42	\$43,666

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

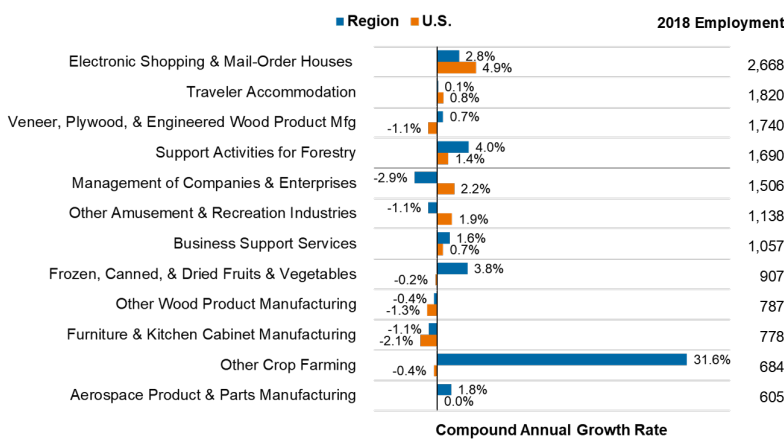
The region's largest and most competitive industry group is forestry and wood products. Location quotients, a measure of industry concentration, help reveal competitive industries in the region (Figure 1). Within forestry and wood products, significant competitive industries include support activities for forestry, plywood and engineered wood product manufacturing, and logging. Other competitive industry groups include e-commerce, wholesale trade, and logistics, agriculture, food, and beverages, tourism, chemicals, and transportation equipment.

Forestry and wood products remains competitive in the region, meanwhile, the cannabis business is booming.

Most of the region's largest traded sector industries have maintained or grown competitiveness over the past ten years, with some exceptions. One way to measure gains and losses in competitiveness is to compare regional industry trends to national industry trends (Figure 2). From this perspective, electronic shopping and mail-order houses (e-commerce), the largest traded sector industry in the region, lost competitiveness between 2008 and 2018. The largest forestry and wood product industries in the region all gained competitiveness, even though some lost jobs over the past ten years. This is not typical of regions in Oregon with a competitive forestry and wood products industry group, where the majority of these industries have lost competitiveness and jobs. Other industries increasing competitiveness were business support services, frozen, canned, and dried fruits and vegetables, and aerospace products. Other crop farming, driven by cannabis, experienced the largest gain in competitiveness by far in the region. Management of companies experienced the largest competitive decline in the region. Tourism industries in accommodations and recreation also saw declines in competitiveness.

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