

OREGON'S MARITIME SECTOR ANALYSIS

**PACIFIC NORTHWEST REGIONAL ECONOMIC CONFERENCE
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OREGON'S MARITIME SECTOR ANALYSIS

- Defining Oregon's maritime sector
- Measuring maritime employment and wages
- Importance of the maritime sector in Oregon's rural communities
- Maritime employment projections through 2032
 - Growth and replacement openings

DEFINING OREGON'S MARITIME SECTOR

1. Covered employment in a set of “standard” industry codes
 - 6,400 jobs
2. Jobs at maritime-related establishments in other industry codes
 - 3,000 jobs
3. Nonemployers in standard maritime industries
 - 1,800 workers

Maritime Jobs

| | |
|--------|---|
| 112511 | Finfish farming and fish hatcheries |
| 112519 | Other aquaculture |
| 112512 | Shellfish farming |
| 114111 | Finfish fishing |
| 114112 | Shellfish fishing |
| 3117 | Seafood product preparation and packaging |
| 336611 | Ship building and repairing |
| 336612 | Boat building |
| 424460 | Fish and seafood merchant wholesalers |
| 441222 | Boat dealers |
| 445250 | Fish and seafood retailers |
| 48311 | Coastal and deep sea freight transportation |
| 483211 | Inland water shipping, freight, towing, passenger service |
| 483212 | Water taxi, shuttle, and ship chartering |
| 48721 | Scenic and sightseeing transportation, water |
| 4883 | Support activities for water transportation |
| 71393 | Marinas |

All other identified maritime sector firms

DEFINING OREGON'S MARITIME SECTOR: STANDARD INDUSTRY CODES

Oregon's Covered Maritime Sector Jobs and Wages by Industry, 2022

| Industry | Number of Jobs | Total Wages | Average Annual Wage |
|---|-------------------|----------------------|------------------------|
| All Covered Maritime Jobs | 9,421 | \$681,084,037 | \$72,291 |
| Support activities for water transportation | 1,395 | \$131,446,444 | \$94,227 |
| Seafood product preparation and packaging | 1,062 | \$50,063,047 | \$47,140 |
| Ship building and repairing | 953 | \$87,357,655 | \$91,666 |
| Fish and seafood merchant wholesalers | 545 | \$44,800,302 | \$82,202 |
| Boat dealers | 453 | \$30,365,643 | \$67,032 |
| Boat building | 436 | \$22,024,771 | \$50,516 |
| Fish and seafood retailers | 294 | \$11,063,392 | \$37,631 |
| Scenic and sightseeing transportation, water | 256 | \$9,443,695 | \$36,889 |
| Marinas | 213 | \$9,197,065 | \$43,179 |
| Finfish fishing* | 202 | \$11,657,713 | \$57,711 |
| Finfish farming and fish hatcheries | 199 | \$11,740,160 | \$58,996 |
| Coastal and deep sea freight transportation | 151 | \$21,865,638 | \$144,806 |
| Inland water shipping, freight, towing, passenger service | 105 | \$10,923,658 | \$104,035 |
| Shellfish farming | 78 | \$2,684,358 | \$34,489 |
| Water taxi, shuttle, and ship chartering | 33 | \$1,389,025 | \$42,092 |
| Shellfish fishing | 19 | \$1,552,049 | \$81,687 |
| Other aquaculture | 3 | \$122,502 | \$47,420 |
| All other identified maritime sector firms | 3,025 | \$223,386,920 | \$73,847 |

* Includes commercial fishing jobs covered by unemployment insurance.

Source: Oregon Employment Department, Quarterly Census of Employment and Wages

MEASURING OREGON'S MARITIME WORKFORCE: MARITIME-RELATED ESTABLISHMENTS IN OTHER INDUSTRIES

All Other NAICS Codes for Selected Maritime Sector Firms 2022 Total Employment = 3,025

| NAICS - Industry Name | NAICS - Industry Name | NAICS - Industry Name |
|---|--|---|
| 221 - Utilities | 441 - Motor vehicle and parts dealers | 561 - Administrative and support services |
| 236 - Construction of buildings | 445 - Food and beverage stores | 562 - Waste management and remediation services |
| 237 - Heavy and civil engineering construction | 449 - Home furnish., electronics, appliance retailers | 611 - Educational services |
| 238 - Specialty trade contractors | 457 - Gasoline stations and fuel dealers | 621 - Ambulatory health care services |
| 314 - Textile product mills | 458 - Clothing, accessories, shoe, jewelry retailers | 712 - Museums, historical sites, zoos, and parks |
| 315 - Apparel manufacturing | 459 - Sporting goods, hobby, book, and misc. retailers | 713 - Amusements, gambling, and recreation |
| 325 - Chemical manufacturing | 488 - Support activities for transportation | 721 - Accommodation |
| 332 - Fabricated metal product manufacturing | 492 - Couriers and messengers | 722 - Food services and drinking places |
| 333 - Machinery manufacturing | 493 - Warehousing and storage | 811 - Repair and maintenance |
| 339 - Miscellaneous manufacturing | 531 - Real estate | 813 - Membership associations and organizations |
| 423 - Merchant wholesalers, durable goods | 532 - Rental and leasing services | 921 - Executive, legislative and general government |
| 424 - Merchant wholesalers, nondurable goods | 541 - Professional and technical services | 924 - Administration of environmental programs |
| 425 - Electronic markets and agents and brokers | | 926 - Administration of economic programs |

Source: Oregon Employment Department

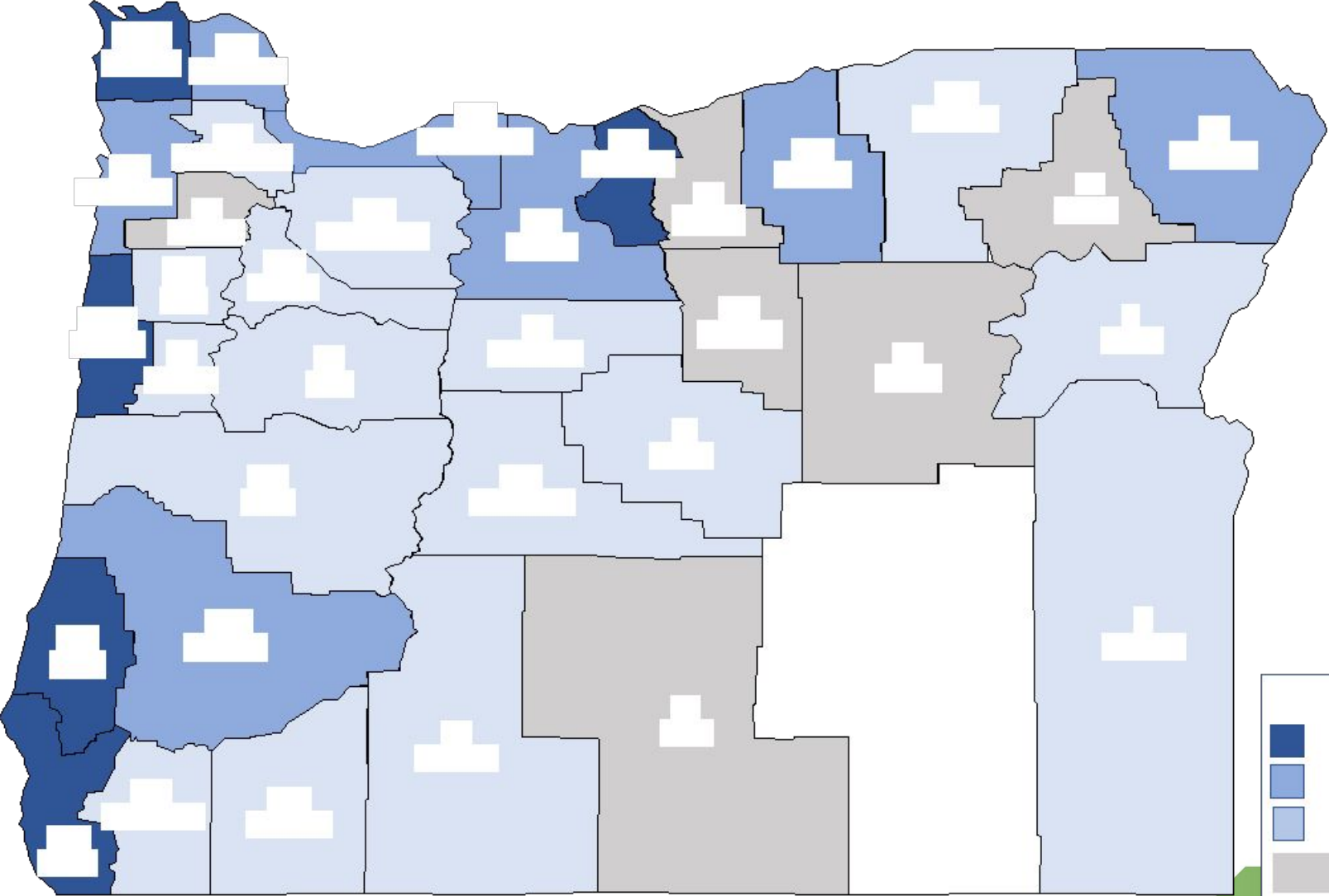
MEASURING OREGON'S MARITIME WORKFORCE: NONCOVERED EMPLOYERS IN STANDARD INDUSTRIES

Oregon Nonemployers in Standard Maritime Industries, 2021

| Industry | Nonemployers |
|---|--------------|
| Total | 1,816 |
| Fishing | 1,794 |
| Boat Dealers | 12 |
| Seafood Product Preparation and Packaging | 7 |
| Fish and Seafood Markets | 3 |

*Source: Oregon Employment Department,
US Census Bureau Nonemployer Statistics Program*

IMPORTANCE OF MARITIME JOBS IN RURAL COMMUNITIES



MARITIME INDUSTRY PROJECTIONS

10-Year Employment Projections for Oregon's Core Maritime Industries

| Industry | 2032 | | | |
|---|--------------------|-------------------------|------------|-------------------|
| | 2022 Employment | Projected Employment | Change | Percent Change |
| Total | 7,411 | 7,950 | 539 | 7% |
| Support Activities for Water Transportation | 1,395 | 1,356 | -39 | -3% |
| Ship and Boat Building | 1,389 | 1,696 | 307 | 22% |
| Fishing | 1,235 | 1,217 | -18 | -1% |
| Seafood Product Preparation and Packaging | 1,062 | 1,167 | 105 | 10% |
| Fish and Seafood Merchant Wholesalers | 545 | 594 | 49 | 9% |
| Boat Dealers | 453 | 498 | 45 | 10% |
| Fish and Seafood Markets | 294 | 306 | 12 | 4% |
| Animal Aquaculture | 280 | 347 | 67 | 24% |
| Scenic and Sightseeing Transportation, Water | 256 | 260 | 4 | 2% |
| Marinas | 213 | 245 | 32 | 15% |
| Deep Sea, Coastal, and Great Lakes Water Transportation | 151 | 146 | -5 | -3% |
| Inland Water Transportation | 138 | 119 | -19 | -14% |

Source: Oregon Employment Department

MARITIME OCCUPATIONAL PROJECTIONS

Top Occupations in Oregon's Maritime Industries Replacements Based on Jobs in All Oregon Industries (Not Just Maritime)

| Occupation Title | 2022 Employment | 2032 Projected Employment | Change | Replacement Openings (2022-2032) | Total Openings (2022-2032) |
|--|--------------------|---------------------------------|------------|--|----------------------------------|
| Total, All Occupations | 7,411 | 7,950 | 539 | 8,450 | 8,989 |
| Fishing and Hunting Workers | 1,202 | 1,184 | -18 | 1,550 | 1,532 |
| Meat, Poultry, and Fish Cutters and Trimmers | 518 | 569 | 51 | 640 | 691 |
| Captains, Mates, and Pilots of Water Vessels | 320 | 346 | 26 | 340 | 366 |
| Sailors and Marine Oilers | 281 | 305 | 24 | 310 | 334 |
| General and Operations Managers | 263 | 285 | 22 | 220 | 242 |
| Laborers and Freight, Stock, and Material Movers, Hand | 192 | 208 | 16 | 260 | 276 |
| Welders, Cutters, Solderers, and Brazers | 181 | 196 | 15 | 180 | 195 |
| Office and Administrative Support Workers, All Other | 179 | 194 | 15 | 200 | 215 |
| First-Line Supervisors of Production and Operating Workers | 178 | 193 | 15 | 170 | 185 |
| Retail Salespersons | 167 | 181 | 14 | 250 | 264 |
| Tank Car, Truck, and Ship Loaders | 146 | 159 | 13 | 180 | 193 |
| Miscellaneous Assemblers and Fabricators | 128 | 139 | 11 | 140 | 151 |
| Bookkeeping, Accounting, and Auditing Clerks | 106 | 116 | 10 | 130 | 140 |
| Heavy and Tractor-Trailer Truck Drivers | 105 | 114 | 9 | 110 | 119 |

Source: Oregon Employment Department

CONCLUSION

- Maritime workforce totaled around 11,300 in 2022.
- Oregon's maritime sector is spread across the state and plays a key economic role in many coastal and rural communities.
- Sector is expected to continue adding new jobs.
- With an aging workforce, replacement openings will be important to fill with new workers.
- Represents challenges for employers, as well as opportunities for Oregonians.

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