

OREGON'S MARITIME SECTOR ANALYSIS

**PACIFIC NORTHWEST REGIONAL ECONOMIC CONFERENCE
MAY 23, 2024**

OREGON'S MARITIME SECTOR ANALYSIS

- Defining Oregon's maritime sector
- Measuring maritime employment and wages
- Importance of the maritime sector in Oregon's coastal and 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

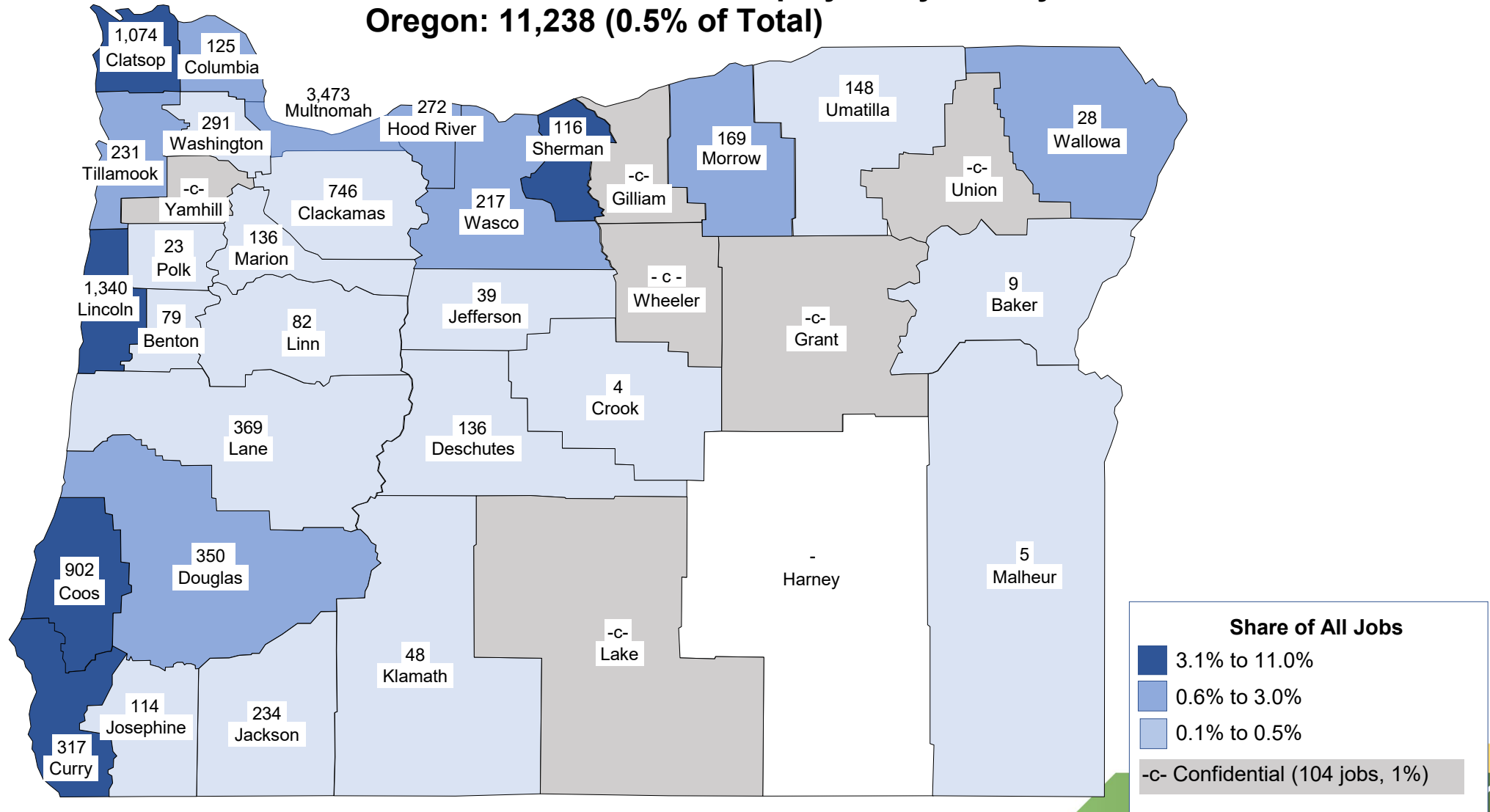
Oregon Nonemployers in Standard Maritime Industries, 2021

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 Sector Covered Jobs and Nonemployers by County
Oregon: 11,238 (0.5% of Total)



Source: Oregon Employment Department (2022) and U.S. Census Bureau, Nonemployer Statistics (2021)

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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