



INDUSTRY CLUSTER UPDATE



FOREWORD

The 2020 Industry Cluster Update utilizes the latest data from the year 2020 from the Oregon Employment Department. We understand that the report is based on data during the height of the COVID-19 Pandemic and may not reflect current cluster economic data. However, as we continue to move forward with long-term economic recovery efforts, this cluster update will provide base foundations for future comparisons and work.



INDUSTRY OVERVIEW

Tualatin's transportation and logistics sector is an integral part of Tualatin's and the Portland Metro's area economy, supporting all sectors. This sector includes a variety of industries: logistics, transportation, warehousing, aviation, and other related services. The sector is responsible for managing the flow of goods, services, and information between a point of origin and destination to meet customer demand.

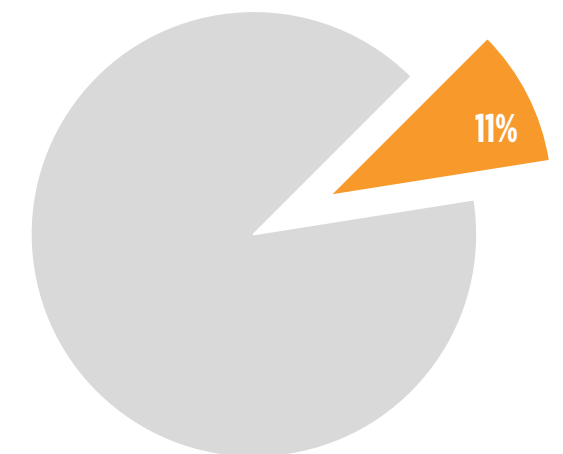
QUICK FACTS

Total Employment: 3,486
Average Salary: \$63,000
Number of Firms: 213

Largest Employers:

- United Parcel Service
- DPI Specialty Foods
- Columbia Corrugated Box
- Mclane Food Service
- FedEX

INDUSTRY CLUSTER EMPLOYMENT



CLUSTER UPDATE

This sector has continued to experience growth as suburban communities fulfill demand for warehousing and logistics to support the broader Portland Metro area. Tualatin's transportation and logistics cluster employment base grew 5% since 2017 with an **average salary increase of 7%**. As with most clusters, the total number of firms within this cluster decreased by 2%.

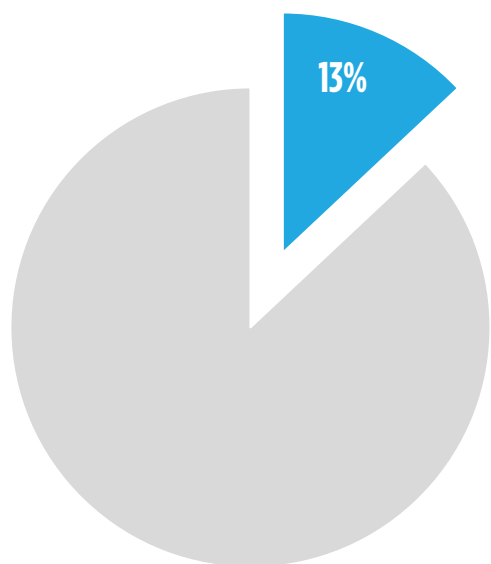
SOFTWARE & TECHNOLOGY



INDUSTRY OVERVIEW

Software and technology enterprises are high-knowledge, human-capital-based businesses that are expanding globally. This cluster includes companies that may develop, produce, or provide software, hardware, data management, internet-based services, and other information services. This industry is also involved with development of off-the-shelf software products to consumer programming, computer facilities management, computer systems design, and data processing. This cluster is Tualatin's **largest** employment sector.

INDUSTRY CLUSTER EMPLOYMENT



QUICK FACTS

Total Employment: 3,991
Average Salary: \$111,000
Number of Firms: 78

Largest Employers:
 Lam Research
 TacPro
 Ichor Systems
 Dealer Spike
 JAE Oregon

CLUSTER UPDATE

Of the five identified 2017 Industry Clusters, this cluster has seen the most growth in employment and average annual salary. Between 2016 and 2020, software and technology employment grew at a **tremendous rate of 40%**. Corresponding with that growth, average **annual salary increased by 18%**. The sector lost 11% of its firms since 2017. Reasons for this decrease could include limited industrial space for growth, acquisitions, and smaller firms unable to compete in the overall economy.

CORPORATE & FINANCIAL



INDUSTRY OVERVIEW

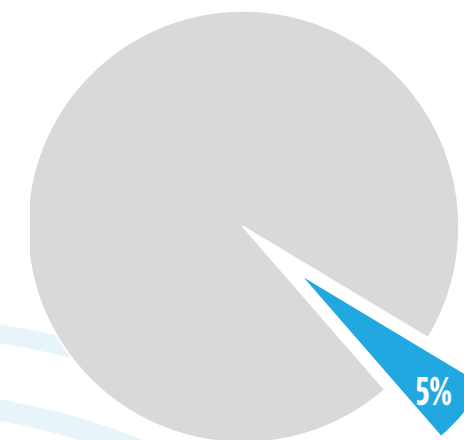
Corporate and financial (business services) provide the top-tier management for local, regional, national, and international commerce. This sector represents the full spectrum of businesses focused on management of businesses, consulting services, securities and brokers, and marketing services. This cluster is Tualatin's only emerging cluster.

QUICK FACTS

Total Employment: 1,502
Average Salary: \$84,000
Number of Firms: 196

Largest Employers:
 AKS Engineering
 Portland General Electric
 Enterprise Rent-A-Car
 Xenium Resources

INDUSTRY CLUSTER EMPLOYMENT



CLUSTER UPDATE

As an emerging cluster, the corporate and financial sector is a non-concentrated industry in the region but is growing quickly. This sector has increased the number of firms by 15% but has lost 36% of its workforce since 2016. Yet, the average annual salary has **increased by 49%, the largest of any industry cluster**. The employment decrease can be attributed to workforce reductions by several firms within this cluster.

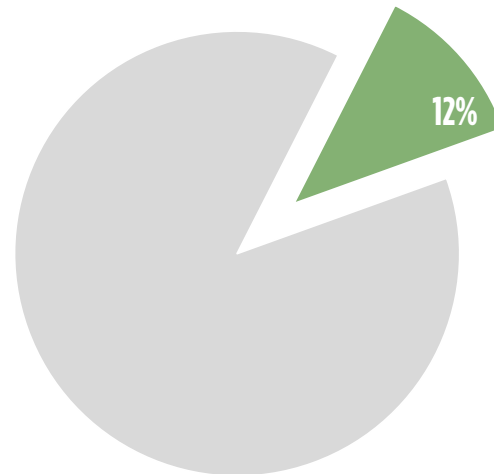
WELLNESS & HEALTH



INDUSTRY OVERVIEW

Extending beyond local healthcare delivery, this sector represents a continuum of businesses ranging from treating diseases to a multidimensional and holistic approach that focuses on complete physical and mental health, social well being, and disease prevention. Companies in this industry include physicians, dentists, chiropractors, optometrists, mental health practitioners, physical and speech therapists, and other health professionals. The industry also includes home health, wellness centers, fitness clubs, and medical labs.

INDUSTRY CLUSTER EMPLOYMENT



QUICK FACTS

Total Employment: 3,676
Average Salary: \$66,000
Number of Firms: 190

Largest Employers:
 Legacy Meridian
 Center for Autism
 Bay Club
 Kaiser

CLUSTER UPDATE

The City of Tualatin wants to **thank and acknowledge our healthcare workers** for their tireless efforts to treat individuals with COVID-19, and for continuing their normal course of care for thousands of existing patients.

This cluster has remained relatively unchanged since 2016. Unemployment has remained stable and the number of firms has increased by 8%. The average annual salary increased 14%.

ADVANCED MANUFACTURING



INDUSTRY OVERVIEW

Advanced manufacturing is the integration of high-tech processes, machinery and materials, and includes companies that may utilize or develop innovative processes. A vital component to advanced manufacturing is a skilled workforce, where skills required of workers are often more advanced and broad than those in other industries. Examples of advanced manufacturing tools and techniques include computer aided design, simulations, robotics, laser and enhanced prototyping. Tualatin's advanced manufacturing super-cluster includes chemical and plastic materials, food processing, medical equipment, and metal products.

INDUSTRY CLUSTER EMPLOYMENT



QUICK FACTS

Total Employment: 3,940
Average Salary: \$60,000
Number of Firms: 93

Largest Employers:
 Nortek
 Campbell Soup Supply
 Pacific Motion
 Milgard Manufacturing
 KAI USA

CLUSTER UPDATE

Advanced manufacturing has been a pillar of the Portland Metro and Tualatin's economies for decades. As technologies change, so do the definitions and outputs for "advanced manufacturing." Over the last four years, the cluster has seen a decrease in employment of 11%. Major closures, company acquisitions, and expansions outside the city have led to this reduction. **The average annual salary increased 15%.** Food processing is the fastest growing industry in Tualatin.

