14th Oregon Leadership Summit
Where Do We Go From Here?

Oregon’s Maritime Economic Sector
A Sector of Business Clusters
Maritime means: Related to the sea and inland waters including water-side & upland activities

Problem Statement:

- #1: Oregon doesn’t formally recognize the existence of a maritime sector;
- #2: Oregon Workforce Investment does not recognize workers that report to zip codes out of state.
- Washington does. “The sector contributes more than $15 billion in gross business income, and directly employs 57,700 people. Including indirect and induced impacts, the sector is responsible for 146,000 jobs in the state and $30 billion in economic activity.”¹

- We can use Puget Sound as a comparative proxy for the entire state of Oregon (coast, Columbia River and inland waters, distant waters, Oregon workers in out of state jobs),
- So, where does a ~$15B economic sector, with 60,000 jobs (with indirect multipliers resulting in responsible for 146,000 jobs in the state and $30 billion in economic activity ) fit in the Oregon “stack”?
- And, what portion of Oregon Workforce Investment dollars should encourage and develop the Oregon Maritime Economic Sector Workforce?

Maritime careers span a wide range of opportunities from deep sea to shoreside positions.
### Port Operations
- Cargo Loading and Unloading
- Longshoreman
- Stevedores
- Passenger Loading and Unloading
- Distribution of Cargo (Arrival/Departure)
- Multimodal Distribution
- Homeland/Maritime Security
- Marine Logistics (Cargo Distribution)
- Spill Response

### Transportation
- Cargo (dry and liquid)
- Passenger (ferry and cruise)
- Tug/Towboats (ship assist, tow, bunkering)
- Recreational

### Maritime-Related Professions
- Marine Engineering
- Naval Architects
- Admiralty Lawyers and Staff
- Risk Managers/Insurers/Surveyors
- Marine Chemists
- Merchants Exchange Members

### Shipbuilding and Repair
- Ship Repair Operations
- Tug and Barge Construction
- New Vessel Construction
- Recreational Boat Construction and Repair
- Ship Engineering and Design

### Offshore Exploration and Support
- Scientific and Oceanographic Research
- Commercial
- Academia

### Fishing and Crabbing
- Commercial Fishers
- Commercial Crabbers
- Charter
- Recreational
- Operations/Engineering/Logistics Support
- Catch Operations
- Processing
- Marine Hardware and Chandlery
- Distant Waters Operations

### Maritime Workforce Deployed around the Globe
- US Commercial Mariners on ships of many flags
- US Merchant Marine & Military Sealift Command
- Tug & Tow Mariners
- Local Fishers and Crabbers
- Distant Waters Fishing and Crabbing Fleet
- Oil & Gas Operations Fleet
- Research Vessel Fleet and US NOAA
- US Coast Guard
- US Navy & Marine Corps

### Maritime Sector Clusters and Activities:

<table>
<thead>
<tr>
<th>Cluster</th>
<th>Activities</th>
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<tbody>
<tr>
<td>Shipbuilding and Repair</td>
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</table>

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Maritime means “Deep Draft”

MINERAL BULKS
#1 on West Coast

AUTO IMPORTS & EXPORTS
Major West Coast gateway

WOOD EXPORTS
#1 on West Coast

Maritime means “Bulk Commodities”
Maritime means “Merchant Vessels”

The Evolution of Container Ships

- **First Generation**
  - 1970 - Present
  - 1,000 Containers
  - 25'-30' Draft

- **Second Generation**
  - 1975 - Present
  - 2,000 Containers
  - 30'-35' Draft

- **Third Generation**
  - 1985 - Present
  - 3,500-4,400 Containers
  - 39'-44' Draft

- **Fourth Generation**
  - 1988 - Present
  - 4,400-5,500 Containers
  - 41'-45' Draft

Maritime means “Ports”
Maritime means “Cargo & Commerce”

Maritime means “Ships, Barges, Containers & Facilities”
Maritime means “Big Ports” and “Multi-Function Ports”

Port of Portland  Port Westward/Port of St Helens  Port of Morrow

Aerial view of Port of Newport  Marina at Port of Iwaco  Fishing boats at Port of Garibaldi

Maritime means “Small Ports”
Maritime means “Shipyards and Boatyards”

Vigor at Portland

Boat lift at Port of Toledo

Boatyard at Port of Coos Bay

Maritime means “Ship Assist Tugs”
Maritime means “Inland Waters”

Marine Transportation: Tugs + Barges + Mariners + Facilities & Commodity Clients & Home Ports + Vendors + Supply Chain

Maritime means “Dams and Locks”
Maritime careers span a wide range of opportunities from deep sea to shoreside positions.
Maritime careers span a wide range of opportunities from deep sea to shoreside positions.
Training Vessels: Ships + Mariners + Instructors + Students & Home Ports + Campus + Vendors + Supply Chain
The “Phantom Fleet”: Oregon Mariners who pay Oregon income taxes and go to work around the globe

Oregon’s Maritime Workforce Deployed around the Globe

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Footnote:
41 year taxpayer – 38 years out of state zip codes – 26 years driving ships

Starting places:
- #1: Restore marine engineering workforce training in Oregon!
- #2: Attract mariners and families to Oregon “Homeport Oregon”

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