Overview

With more than 95 percent of the world’s population and 80 percent of the world’s purchasing power outside the United States, future economic growth and jobs for Oregon and America increasingly depend on expanding U.S. trade and investment opportunities in the global marketplace.

The following pages feature key facts and figures drawn from new Business Roundtable research, U.S. government data, and other data sources that demonstrate the benefits of international trade and investment to economic growth and jobs in Oregon.

Trade Creates & Supports Jobs in Oregon

- **International trade, including exports and imports, supports 505,700 Oregon jobs – more than one in five.** These trade-related jobs grew nearly four times faster than total employment from 1992 to 2017 and are at large and small companies, on farms, in factories, and at the headquarters of Oregon’s globally engaged firms. *(See Oregon Jobs Depend On Two-Way Trade)*

- **Oregon exported $20.8 billion in goods and $9.0 billion in services in 2017,** including lime & gypsum products, veneer, plywood & engineered wood, pesticides & fertilizers and travel services. Of Oregon's 5,670 exporters, 89 percent are small- and medium-sized companies with less than 500 workers. *(See Oregon Businesses Grow With Exports)*

- **Customers in 200 countries and territories buy Oregon-made goods and services,** including billions of dollars in annual exports to top markets like China, Canada and Malaysia. Oregon's exports have grown about nine percent faster than state GDP since 2007. *(See Oregon Companies Export Throughout The World)*

- **Imports lower prices and increase choices for Oregon companies and families.** Lower raw material and input costs help Oregon companies stay competitive in global markets, while families can stretch paychecks further as trade agreements reduce the cost of products by eliminating costly barriers to trade. *(See Oregon Companies Use Imports to Make Competitive Products)*

- **Free trade agreements (FTAs) have helped fuel rapid export growth from Oregon to partner countries.** In 2017, $6.1 billion of Oregon's goods exports, or 29 percent, went to FTA partners. *(See Oregon Needs Trade Agreements To Grow)*

- **Foreign-owned companies invest and build facilities and employ 65,300 workers in Oregon.** *(See Foreign Investment In Oregon Creates Jobs)*

Contact: Paul DeLaney, Business Roundtable: pdelaney@brt.org  
www.brt.org/trade
Overview

Creating and preserving quality U.S. jobs is a goal shared by all Americans. With more than 95 percent of the world’s population and 80 percent of the world’s purchasing power outside of the United States, future American economic growth and job creation depend on open markets abroad.

Trade Supports Jobs in Oregon

- Export growth increases jobs by generating new business for Oregon’s manufacturers, service providers and farmers. Imports support jobs and keep costs low, helping Oregon businesses compete and saving Oregon families real dollars at the cash register.
- More than one in five Oregon jobs depends upon international trade.
- Oregon’s trade-related employment grew nearly four times faster than total employment from 1992 to 2017.
- Jobs in export-dependent industries pay about 16 percent more than jobs in less export-intensive industries.
- U.S. exporting plants increase employment 2 to 4 percent faster annually than plants that do not export. Exporting plants also are less likely to go out of business.
- Trade-supported jobs are not just at companies that export and import. Trade supports higher wages for workers and lower costs for companies and consumers, providing them with more money to spend on other things. This spending supports additional jobs throughout the U.S. economy in sectors like entertainment, education and construction.

By the Numbers

505,700
Number of Jobs in Oregon Supported by Trade

Share of Jobs Tied to Trade
Increased 93 percent from 1992 to 2017

Jobs Tied to Trade
Top Sectors, 2017

- Trade & Distribution 115,500
- Prof., Scient. & Tech. Services 80,800
- Agriculture 40,200
- Personal & Rec. Services 32,000
- Manufacturing 21,700

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OREGON BUSINESSES GROW WITH EXPORTS

Overview

Oregon exported an estimated $20.8 billion in goods and $9.0 billion in services in 2017. Between 2007 and 2017, Oregon goods exports have increased by 26 percent and services exports by 75 percent. Large companies now account for 79 percent of the value of Oregon’s goods exports, with the rest provided by small- and medium-sized enterprises (SMEs).

Small & Large Employers Partner to Export

In addition to exporting directly themselves, thousands of American SMEs export indirectly when they sell goods and services to large U.S. exporters. Based on their direct and indirect export activity combined, SMEs represent more than 40 percent of the value of U.S. exports.

Top Oregon Exports

- Oregon ranks among the top 5 state exporters in 10 industries, including first in lime & gypsum products ($23 million), first in veneer, plywood & engineered wood ($182 million), second in pesticides & fertilizers ($682 million), and third in greenhouse & nursery products ($80 million).
- Oregon is America’s 24th largest exporter of agricultural products. It is the third largest exporter of greenhouse & nursery products, the eighth largest exporter of miscellaneous crops, the ninth largest exporter of vegetables & melons, and the ninth largest exporter of fruits & tree nuts.
- One of Oregon’s fastest growing export categories is pharmaceuticals & medicines, which increased by 27 times its 2007 value. In 2017, exports of these products reached $645 million.

By the Numbers

5,670
Number of Oregon Businesses that Exported in 2016

Share of Oregon Exporters that are Small- & Medium-Sized Businesses

89%

Top Oregon Exports, 2017

<table>
<thead>
<tr>
<th>Goods</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Semiconductors &amp; Components</td>
<td>$6.3 billion</td>
</tr>
<tr>
<td>Industrial Machinery</td>
<td>$2.9 billion</td>
</tr>
<tr>
<td>Computer Equipment</td>
<td>$1.4 billion</td>
</tr>
<tr>
<td>Pesticides &amp; Fertilizers</td>
<td>$682 million</td>
</tr>
<tr>
<td>Navigational &amp; Meas. Instruments</td>
<td>$658 million</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Services</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Travel</td>
<td>$2.0 billion</td>
</tr>
<tr>
<td>Royalties from Industrial Processes</td>
<td>$1.9 billion</td>
</tr>
<tr>
<td>R&amp;D &amp; Testing Services</td>
<td>$1.4 billion</td>
</tr>
</tbody>
</table>

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In 2017, Oregon companies sold their products in 200 countries and territories.

Top export markets include:

- **Canada**: Goods Exports: $2.3 billion, Services Exports: $577 million
- **China**: Goods Exports: $3.8 billion, Services Exports: $646 million
- **Korea**: Goods Exports: $1.9 billion, Services Exports: $350 million
- **Vietnam**: Goods Exports: $1.6 billion, Services Exports: $20 million
- **Malaysia**: Goods Exports: $2.3 billion, Services Exports: $44 million
- **Japan**: Goods Exports: $1.5 billion, Services Exports: $537 million

Fast Facts: How Exports Help the Oregon Economy Grow

- Oregon's exports have grown about nine percent faster than state GDP since 2007. The average annual export growth during this period was 3.8 percent, while the average annual state GDP growth was 3.5 percent.
- Oregon's top export markets for goods are China, Canada, and Malaysia. Its top market for services is Ireland.
- Oregon's goods exports to Vietnam have grown by 57 percent per year since 2007, while Oregon's services exports to Hong Kong have grown by 19 percent per year.

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OREGON COMPANIES USE IMPORTS TO MAKE COMPETITIVE PRODUCTS

Overview

In 2017, 58 percent ($1.3 trillion) of the products imported into the United States were inputs and components used by American producers. Lower cost inputs keep U.S. manufacturing competitive in international markets. Imports frequently contain components (like cotton or semiconductors) and services inputs (like design) provided by U.S. companies and farmers, including companies and farmers in Oregon.

- Services, especially transportation from Oregon’s ports, finance and insurance, marketing and legal services are needed to bring imported goods to American manufacturers and households.
- In 2016, about 75 percent of identified U.S. importers were very small businesses with less than 20 employees.
- Trade and investment liberalization policies save the average Oregon family of four more than $10,000 per year.
- Imports help keep prices down for Oregon families while increasing their choices for goods and services. Prices for imported consumer goods tend to drop year after year.

In 2016, about 211,000 U.S. companies (including 5,309 in Oregon) imported products...

And roughly three-quarters of U.S. importers were very small businesses with less than 20 employees.

Imports Decrease Prices

-87.9% Decrease in the Price of Televisions Between 2007 and 2017.

-63.3% Decrease in the Price of Computers Between 2007 and 2017.

-44.7% Decrease in the Price of Toys Between 2007 and 2017.

Imports Increase Choices

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Overview

Trade with our free trade agreement (FTA) partner countries supports millions of American jobs. Trade agreements level the playing field by lowering other nations’ trade barriers, opening up foreign markets to U.S. exports and setting strong, enforceable rules for trade between the United States and those other countries.

- In 2017, $6.1 billion of Oregon's goods exports, or 29 percent, went to FTA partners.
- Since 2007, Oregon's goods exports to countries with FTAs in effect with the United States in 2017 have decreased by 11 percent.
- But Oregon's goods exports to Canada and Mexico have increased by $1.7 billion (167 percent) since NAFTA went into effect in 1994.
- Oregon's goods exports to Chile have increased by 328 percent since the FTA took effect in 2004.
- Oregon's exports to Korea of industrial machinery have increased from $19 million to $1.2 billion since the FTA went into effect in 2012.
- In 2017, $2.1 billion of Oregon's services exports, or 24 percent, went to FTA partners.
- Oregon's exports to Singapore of R&D & testing services have increased from $5.4 million to $206 million, or by 3,729 percent, since 2006 (earliest year available).

By the Numbers

-11%

Change in Oregon Goods Exports to FTA Partners Between 2007 and 2017

Per Capita Purchases of Oregon Goods, 2017

<table>
<thead>
<tr>
<th>Non-FTA Countries</th>
<th>FTA Partner Countries*</th>
</tr>
</thead>
<tbody>
<tr>
<td>$2.19</td>
<td>$13.13</td>
</tr>
</tbody>
</table>

* U.S. FTAs in effect with countries in 2017.

In 2017, FTA partners purchased 6.0 times more goods per capita from Oregon than non-FTA partners.

Contact: Paul DeLaney, Business Roundtable; pdelaney@brt.org www.brt.org/trade
Overview

Foreign-owned companies invest significant amounts of capital to open or expand facilities in Oregon every year. Foreign-owned companies from around the world employed tens of thousands of workers in Oregon, including:

- 17,000 workers employed by companies based in the United Kingdom;
- 9,300 workers employed by companies based in Japan;
- 8,800 workers employed by companies based in Germany;
- 5,700 workers employed by companies based in Switzerland;
- 5,500 workers employed by companies based in Canada.

### Foreign-Owned Companies Employed 65,300 Oregon Workers Across Many Industries, 2016

<table>
<thead>
<tr>
<th>Industry</th>
<th>Workers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manufacturing</td>
<td>23,600</td>
</tr>
<tr>
<td>Other</td>
<td>19,100</td>
</tr>
<tr>
<td>Wholesale Trade</td>
<td>10,800</td>
</tr>
<tr>
<td>Finance &amp; Insurance</td>
<td>4,300</td>
</tr>
<tr>
<td>Retail Trade</td>
<td>3,400</td>
</tr>
<tr>
<td>Prof., Sci. &amp; Tech. Services</td>
<td>2,200</td>
</tr>
<tr>
<td>Information</td>
<td>2,000</td>
</tr>
</tbody>
</table>

### Selected Foreign-Owned Companies Employing Workers in Oregon

<table>
<thead>
<tr>
<th>Company</th>
<th>Industry</th>
<th>Country</th>
</tr>
</thead>
<tbody>
<tr>
<td>Acuren Group</td>
<td>Inspecting &amp; Testing Services</td>
<td>Canada</td>
</tr>
<tr>
<td>Adidas-Salomon Inc.</td>
<td>Footwear Manufacturing</td>
<td>Germany</td>
</tr>
<tr>
<td>ASC Profiles</td>
<td>Steel Products Manufacturing</td>
<td>Australia</td>
</tr>
<tr>
<td>Evraz North America</td>
<td>Steel Manufacturing</td>
<td>Luxembourg</td>
</tr>
<tr>
<td>Interfor</td>
<td>Wood Product Manufacturing</td>
<td>Canada</td>
</tr>
<tr>
<td>KPMG LLP</td>
<td>Accounting Services</td>
<td>Netherlands</td>
</tr>
<tr>
<td>Mercedes-Benz</td>
<td>Automotive Manufacturing</td>
<td>Germany</td>
</tr>
<tr>
<td>Ricoh Americas Corporation</td>
<td>Manufacture/Distribute Office Equipment</td>
<td>Japan</td>
</tr>
<tr>
<td>Rodda Paint</td>
<td>Paint Manufacturing</td>
<td>Canada</td>
</tr>
<tr>
<td>Siltronic Corp.</td>
<td>Semiconductor Manufacturing</td>
<td>Germany</td>
</tr>
<tr>
<td>Solarworld Industries America</td>
<td>Power Equipment Manufacturing</td>
<td>Germany</td>
</tr>
<tr>
<td>Vestas Blades America</td>
<td>Turbine Manufacturing</td>
<td>Denmark</td>
</tr>
</tbody>
</table>

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OREGON JOBS DEPEND ON TWO-WAY TRADE


OREGON BUSINESSES GROW WITH EXPORTS

Small and Large Firms Partnering to Export (for 2006, the most recent year for which data were available): U.S. International Trade Commission, Small and Medium-Sized Enterprises: Characteristics and Performance, November 2010, (http://www.usitc.gov/publications/332/pub4189.pdf)


OREGON COMPANIES EXPORT THROUGHOUT THE WORLD


OREGON COMPANIES USE IMPORTS TO MAKE COMPETITIVE PRODUCTS


Imports as Components: Derived from Census end-use import data


Price Changes: Derived from BLS Consumer Price Index database (http://www.bls.gov/cpi/)

OREGON NEEDS TRADE AGREEMENTS TO GROW


Per Capita Purchases of Oregon Goods: Derived from The Trade Partnership (http://tradepartnership.com/data/cdxports-and-cdxjobs) and World Bank population estimates

FOREIGN INVESTMENT IN OREGON CREATES JOBS

Employment Data: BEA “Direct Investment & Multinational Companies” database (http://bea.gov/ITable/index_MNC.cfm)

Foreign Investors: Uniworld BP database of “Foreign Firms Operating in the United States” (http://www.uniworldbp.com)

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