

## Maritime Cluster Profile

Central Puget Sound Region of King, Kitsap, Pierce & Snohomish Counties

2014 Regional Employment Estimate<sup>1</sup>: 15,447

Location Quotient: 3.02



The Maritime cluster includes a variety of manufacturing and service activities related to the region's waterways. Some Maritime subsectors are independently competitive, while others work to support other regional activities and industries. The regional **Fishing & Processing** subsector serves as an importer for much of the Alaskan fishing industry to U.S. markets. The **Marine Cargo Transportation & Handling** subsector is closely tied to the Transportation & Logistics cluster, supporting the movement of goods for regional import and export activities for many of the region's industries. The **Water Passenger Transportation** subsector provides passenger boat service for commuters and tourists. Supporting each of these subsectors is the **Shipbuilding & Repair** subsector, which updates and maintains ship fleets.

### Subsectors & Employment

The Fishing & Seafood Processing subsector is the largest employer in this cluster accounting for nearly half of the cluster's employment. Marine Cargo Transportation & Handling comes in second, making up more than a third of the employment. Occupational data show the mix of workers that make up the Maritime industry. More than a third of the jobs are transportation related, as there is need for these types of workers across all Maritime cluster subsectors. The second highest level of employment is in production related occupations, supporting the Shipbuilding & Repair subsector.

#### Maritime Subsector

- **Fishing & Processing** - Catching fish and other seafood and processing the catch for consumption
- **Marine Cargo Transportation & Handling<sup>2</sup>** - Transportation of goods over water, including land based cargo handling
- **Shipbuilding & Repair** - Building and repairing ships
- **Water Passenger Transportation<sup>3</sup>** - Transportation of people over water for travel and sightseeing purposes

#### Cluster Employment by Subsector<sup>4</sup>

Subsector	%
Fishing & Processing	46%
Marine Cargo Transportation & Handling <sup>2</sup>	34%
Shipbuilding & Repair	20%
Water Passenger Transportation <sup>3</sup>	N/A

#### Cluster Employment by Occupation<sup>5</sup>

Occupation	%
Transportation	39%
Production	16%
Administrative Support	12%
Farming, Fishing & Forestry	7%
Sales	7%
Other	7%
Installation, Maintenance & Repair	5%
Management	4%
Business & Financial Operations	3%

<sup>1</sup> Source: PSRC Covered Employment Estimates, See 2012 Regional Economic Strategy for complete industry cluster definition

<sup>2</sup> Marine Cargo Transportation & Handling subsector also related to Transportation & Logistics cluster

<sup>3</sup> Water Passenger Transportation employment counted in Tourism & Visitors cluster totals, and related to Transportation & Logistics cluster

<sup>4</sup> Source: EMSI 2011 complete employment estimates

<sup>5</sup> Source: WA ESD 2013 estimates

## Competitiveness

The region is highly competitive in each Maritime subsector. The region's Fishing & Processing subsector is more than 11 times more concentrated than the national average, due to the proximity to the Alaskan fishing region. The central Puget Sound region is in direct competition with other west coast U.S. and Canadian ports for imports and exports, but holds an employment concentration in the Marine Cargo Transportation & Handling subsector 3.92 times the national average. The Shipbuilding & Repair subsector is also a regional strength with a concentration 23% higher than the national average. Employment and location quotient for the overall cluster have fluctuated between 2002 and 2013. Jobs in the Marine Cargo Transportation & Handling and Water Passenger Transportation subsectors have a strong outlook and are projected to see double digit employment growth between 2012 and 2022.

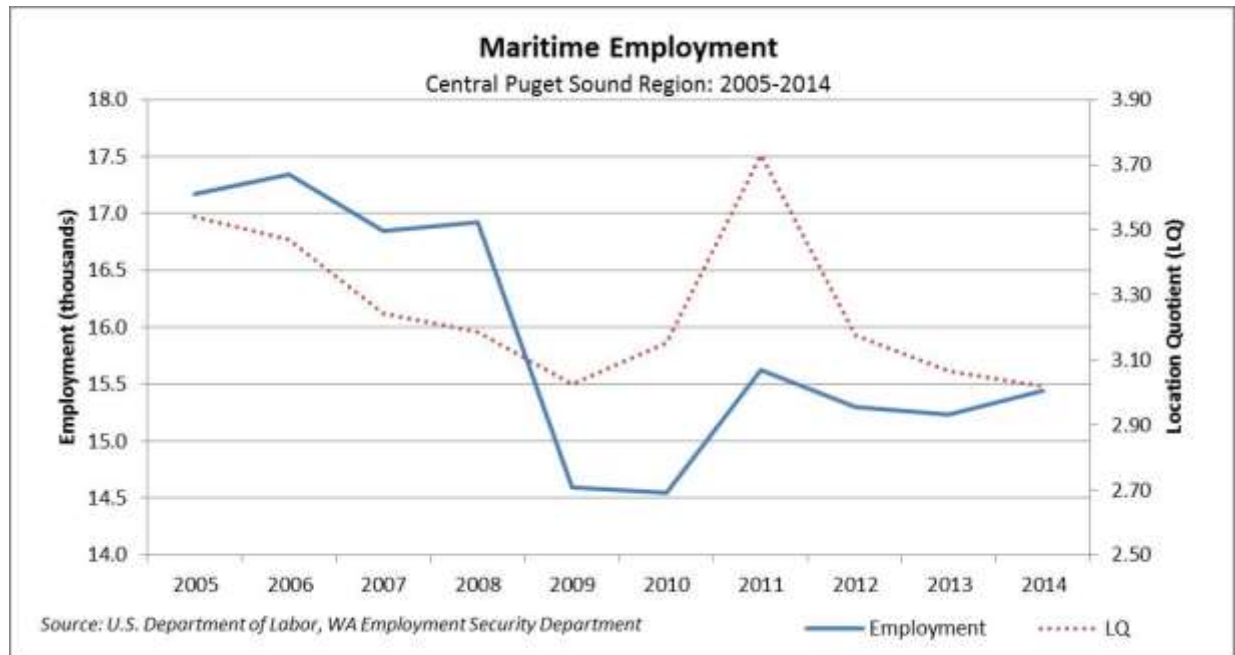
LQ <sup>6</sup>	Subsector	Top 6 U.S. MSAs <sup>7</sup>	
<b>11.25</b>	<b>Fishing &amp; Processing</b> U.S. jobs in the "Fishing, hunting & processing" industry are projected to decrease in the U.S. by 3% <sup>8</sup>	<ul style="list-style-type: none"> <li>• Seattle, WA</li> <li>• Providence, RI</li> <li>• Boston, MA</li> </ul>	<ul style="list-style-type: none"> <li>• Virginia Beach, VA</li> <li>• Los Angeles, CA</li> <li>• Tampa, FL</li> </ul>
<b>3.92</b>	<b>Marine Cargo Transportation &amp; Handling<sup>2</sup></b> U.S. jobs in "Water transportation" are projected to increase by 19% and jobs in "Warehousing & storage" are projected to increase by 17% <sup>8</sup>	<ul style="list-style-type: none"> <li>• Los Angeles, CA</li> <li>• New Orleans, LA</li> <li>• Houston, TX</li> </ul>	<ul style="list-style-type: none"> <li>• New York, NY</li> <li>• <b>Seattle, WA</b></li> <li>• Miami, FL</li> </ul>
<b>1.23</b>	<b>Shipbuilding &amp; Repair</b> U.S. jobs in the "Ship and boat building" industry are projected to decrease by 10% <sup>8</sup>	<ul style="list-style-type: none"> <li>• Virginia Beach, VA</li> <li>• Gulfport, MS</li> <li>• San Diego, CA</li> </ul>	<ul style="list-style-type: none"> <li>• Norwich, CT</li> <li>• New Orleans, LA</li> <li>• Mobile, AL</li> </ul>
<b>7.11</b>	<b>Water Passenger Transportation<sup>3</sup></b> U.S. jobs in "Water transportation" and in "Scenic and sightseeing transportation and support activities for transportation" are each projected to increase by 19% <sup>8</sup>	<ul style="list-style-type: none"> <li>• Miami, FL</li> <li>• Los Angeles, CA</li> <li>• <b>Seattle, WA</b></li> </ul>	<ul style="list-style-type: none"> <li>• Honolulu, HI</li> <li>• New York, NY</li> <li>• Orlando, FL</li> </ul>



= Concentration > U.S. Average



= Concentration < U.S. Average



<sup>6</sup> Source - 2012 Location Quotients: U.S. Cluster Mapping (<http://clustermapping.us>), Institute for Strategy and Competitiveness, Harvard Business School. Copyright © 2014 President and Fellows of Harvard College. All rights reserved. Research funded in part by the U.S. Department of Commerce, Economic Development Administration.

<sup>7</sup> Source - 2012 Employment Totals, Top 6 MSAs by total employment: U.S. Cluster Mapping

<sup>8</sup> Source - 2012-2022 Employment Projections: U.S. Bureau of Labor & Statistics