

OREGON'S ECONOMY AND TRADE

1 in 5 Oregon jobs are dependent upon transportation

In 2015, Oregon moved **348.8M tons of product** valued at **\$353B**

The cost of congestion in the Portland region is **\$1.8B annually**, the **11th highest** in the nation

Oregon manufacturers and their workers **depend on** foreign customers for **\$1 in every \$4 of sales**

OREGON'S GROWING GRIDLOCK IS LIMITING OUR ECONOMIC FUTURE

ROADBLOCKS TO GROWTH

Businesses and industries that make up the local, regional and statewide economy rely on Oregon's multimodal gateway to global markets. The state's economy depends on the success of those businesses and industries. Bottlenecks, decreasing capacity, and lack of infrastructure maintenance and improvements directly impact business' ability to meet current demands and grow. Investment in the state's transportation system is an investment in Oregon's economy.

STATEWIDE CONGESTION

- 1 I-84 eastbound
- 2 I-5 Salem- Albany area
- 3 Bend area
- 4 I-5 Medford
- 5 Hwy 99W

METRO AREA CONGESTION (INSET MAP)

- 6 I-5 Bridge over Columbia
- 7 I-5 at I-405
- 8 I-5 and I-84
- 9 Hwy 217
- 10 I-205 West Linn to Columbia River
- 11 I-5 Wilsonville area north
- 12 Hwy 99 through Dundee
- 13 US 26 at the tunnel

ROAD CONDITION

- 14 US 30 to Astoria – limited capacity at locations
- 15 Hwy 97 from CA to WA – poor condition and lacks passing lanes in some places
- 16 Hwy 42 – too narrow and winding for trucks
- 17 Hwy 38 – Reedsport to Drain, narrow and winding
- 18 I-5 – Douglas and Josephine counties need for truck climbing lane
- 19 I-84 at Farewell Bend, lacks passing lane in some places

WEATHER

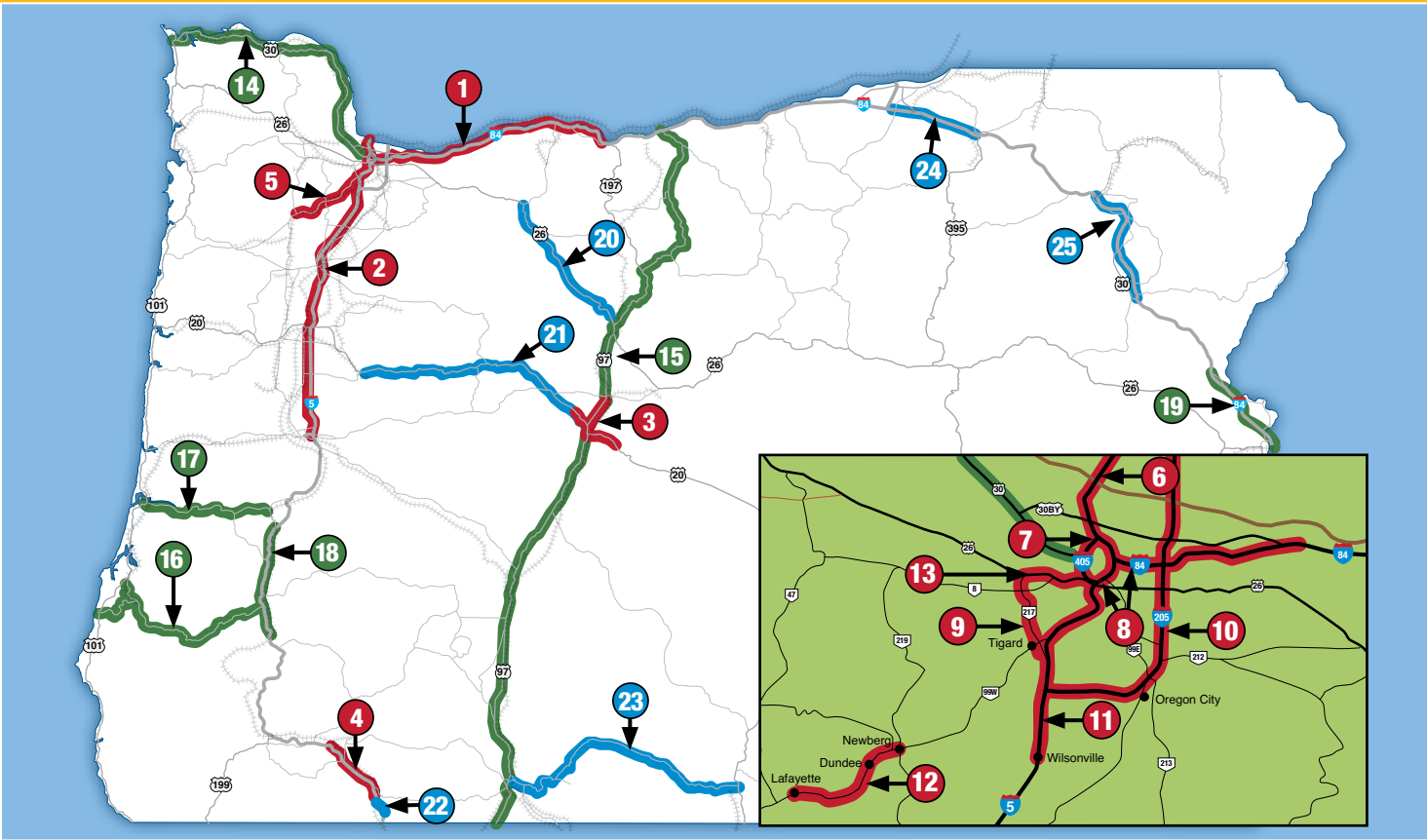
- 20 Hwy 26 Government Camp
- 21 Hwy 26 and 20 over Santiam Pass
- 22 I-5 at Siskiyou Pass
- 23 Hwy 140
- 24 I-84 outside of Umatilla
- 25 I-84 in Blue Mountains, La Grande and Pendleton

RAIL (NOT SHOWN ON MAP)

- Lake County branch heavier rail
- Union Pacific - 6 mph curves north of Steel Bridge
- Signalization and switches at Lake Yard
- Crossovers and switches just west of Willamette Rail Bridge
- Double tracking Kenton Line
- Upgrade of Astoria Line

PORTS (NOT SHOWN ON MAP)

- Willamette River channel deepening (Portland)
- Coos Bay channel deepening
- Berth and channel maintenance at Oregon Ports
- T-6 container service restored
- Major capital maintenance at Oregon Ports

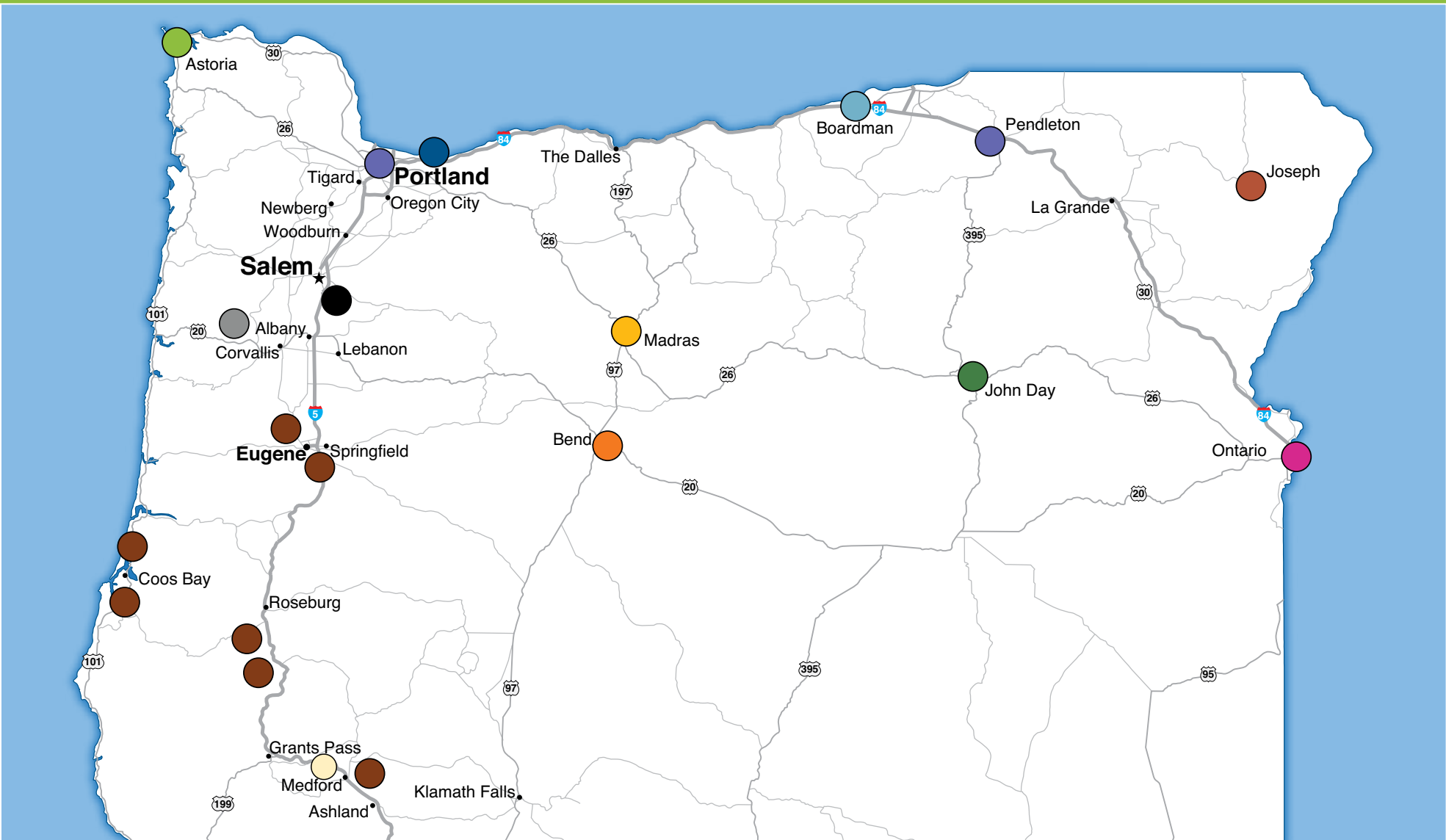


MAP KEY

- CONGESTION AREAS
- ROAD CONDITION QUALITY ISSUES
- WEATHER-IMPACTED AREAS

TRANSPORTATION INVESTMENT CAN GROW OREGON'S ECONOMY

Oregon's congested transportation corridors are jeopardizing the growth of the businesses that draw billions to the state's economy every year. Nearly 6,100 businesses export from Oregon each year and close to 90 percent of those businesses are small to medium-sized companies. Increased transit times from growing congestion are costing companies more and more each quarter. Investing in the state's transportation system is an investment in Oregon's economic future and global competitiveness.



- **Fort George Brewery**, Astoria (Clatsop County)
Employees: 120
Inbound: Hops/barley: OR, WA, ID; Cans: WA; Kegs: Europe
Outbound: Beer: OR, WA, ID
Mode: Truck, ocean, rail
- **Harry & David**, Medford (Jackson County)
Employees: 3,200 year-round, 8,000 at holiday peak
Inbound: Produce, ingredients and specialty food items: OR; baskets: Asia
Outbound: Gift packages: USA
Mode: Truck, ocean, air
- **Ruffwear**, Bend (Deschutes County)
Employees: 31
Inbound: Finished product: Vietnam
Outbound: Finished product: Europe, Japan, South Korea, China, Australia
Mode: Truck, ocean, air
- **Malheur Lumber Company & Ochoco Lumber**, John Day (Grant County)
Employees: 105
Inbound: N/A
Outbound: Lumber and pellets: Japan, China
Mode: Truck, ocean, rail
- **Bossco**, Tangent (Linn County)
Employees: 48
Inbound: Straw, hay, alfalfa: OR
Outbound: Straw, hay, alfalfa, Japan and Korea
Mode: Truck, ocean
- **Boeing**, Portland (Multnomah County)
Employees: 2,009
Inbound: Forgings, castings, fasteners, parts, raw materials: OR, WA, CA, Europe, Russia, Japan
Outbound: Complex aircraft assemblies: WA, SC, Japan, Australia
Mode: Truck, air
- **Boardman Foods**, Boardman (Morrow County)
Employees: 150
Inbound: Fresh unions: OR
Outbound: Fresh and frozen onions: OR, IN, OH, Taiwan, Japan
Mode: Truck, ocean
- **Pendleton Woolen Mills**, Pendleton/Portland (Umatilla and Multnomah Counties)
Employees: 800
Inbound: Scoured wool and yarn: Uruguay, China, Germany
Outbound: Finished goods: USA, Canada, Japan, Europe; Fabric: Mexico, El Salvador, Asia
Mode: Truck, ocean, rail, air
- **Fry Foods**, Ontario (Malheur County)
Employees: 80
Inbound: Onions: OR; Breeding/batter: IL
Outbound: Frozen onion rings and cheese sticks: USA, small amount overseas
Mode: Truck, ocean
- **Norpac**, Salem (Marion County)
Employees: 1,500-2,000
Inbound: Produce: OR, WA
Outbound: Frozen/canned produce: USA, Iceland, Middle East, Guam, Taiwan, Puerto Rico
Mode: Truck, rail, ocean
- **Bright Wood**, Madras (Jefferson County)
Employees: 915 total (840 local)
Inbound: Wood/lumber products: OR, WA, ID, CA, AZ, MT, WY, SD, Canada, Chile, New Zealand
Outbound: Finished wood products: USA, Canada, Japan, Asia, Europe
Mode: Truck, ocean, rail
- **Roseburg Forest Products**, Springfield, Dillard, Medford, Junction City, Riddle, Coquille, North Bend (Lane, Jackson, Douglas, Coos Counties)
Employees: 3,000 total (1,500 local)
Inbound: Veneer: USA, South America, Canada; Raw material: USA
Outbound: Wood products: USA, Japan, China, Korea
Mode: Truck, ocean, rail
- **Valley Bronze**, Joseph (Wallowa County)
Employees: 32
Inbound: Raw materials: CA, WA, OR
Outbound: Bronze sculptures, statues and monuments: USA, Germany, UK, China
Mode: Truck, ocean, air

OREGON CONNECTIONS WITH GLOBAL REACH



FORT GEORGE
Since the brewery opened in 2007 with less than 10 employees, Fort George has grown by leaps and bounds as it continues to try and meet the demands of the skyrocketing craft beer market. With an entire city block devoted to their destination brewery and public house in Astoria as well as a distribution facility in Warrenton, Fort George's 120 employees work to produce and deliver quality beer throughout the Pacific Northwest. Facing increasing congestion along Oregon's coastal highways, the company continues to adjust trucking times in order to meet delivery windows. Dependent on multiple modes of transportation, transportation bottlenecks provide challenges for the company's fast-paced growth.



ROSEBURG FOREST PRODUCTS
Eighty years ago, Kenneth Ford purchased 15,000 acres of Oregon timberland and Roseburg Forest Products was born. Since then, the company has grown significantly now with over 600,000 acres of land, 10 production facilities throughout the U.S. and 3000 employees. Oregon is home to their headquarters, five facilities and 1,500 employees. Manufacturing a variety of wood products, Roseburg depends on a multifaceted transportation network to get their product to market, both domestically and internationally. Increasing challenges with capacity and congestion on the freeway systems in Oregon have forced the company to move some production out of state, taking the associated tax revenue with it. Addressing Oregon's transportation challenges now will allow Roseburg Forest Products to continue to grow.



RUFFWEAR
For the last 22 years, performance dog gear manufacturer, Ruffwear, has been providing outdoor adventurers and their human companions with products for their shared adventures. From collapsible dog bowls, the company's original product, to dog packs and harnesses, Ruffwear and their 31 employees lead the industry pack. In 2013, the company expanded to a 21,000 square foot building that consolidated staff into one space. In 2016, Ruffwear moved the warehouse operation to a third party logistics company in Portland to accommodate the company's growth. With an anticipation of continued growth, investments in Oregon's transportation system are critical for Ruffwear's advancement and competitiveness in an increasing niche market.



PENDLETON WOOLEN MILLS
A sixth-generation family-owned business, Pendleton Woolen Mills has been bringing woven woolen products to consumers for more than 150 years. Reaching markets throughout the world through their network of production facilities, including six in the Pacific Northwest, Pendleton continues to expand their ever growing line of wool products. Dependent on international trade for all aspects of their business, Pendleton imports raw material while exporting finished product throughout the world. With 800 employees and facilities located throughout the state, transportation investments to reduce bottlenecks and improve traffic flow in the Portland metro area are imperative in keeping freight costs low, allowing the one and half century-old business to continue to thrive for years to come.