Region 4 - Snohomish County WDA

The Snohomish WDA is home to Boeing's major aircraft assembly plant and it is no surprise to see that this region has an extremely high location quotient for the aerospace cluster – 50 times the national density of employment in this cluster. Aerospace is also the largest cluster in the county; in fact, aerospace is 1.5 times as large as all of the other clusters shown in the following charts and table for this region. The second largest cluster in the region is the federal military cluster, consisting mainly of the Navy base in Everett. As in WDA 3, the boat building industry in the Snohomish WDA stands out with a very high average compensation level, over $200,000 per year.

Aerospace, the largest cluster and the one with the highest location quotient, grew very slowly from 2001 to 2007; however a much more robust growth rate is expected out to 2018 with the percentage change from 2006 to 2016 expected to reach nearly 20 percent. The military cluster, second largest in the region, is projected to change little in employment level in the years ahead. The sheet metal products cluster expanded by 67% from 2001 to 2007 and is projected to expand by another 26% from 2006 to 2016. Forest products and electrical machinery employment declined in recent years, and this downward trend is expected to continue.

In this region, 8 of 11 clusters for which occupational data are available have a higher percentage of middle wage jobs than the regional average, but only 3 of the 11 have a higher percentage of high wage jobs. Aerospace is the most highly ranked cluster overall in this region, scoring well above several closely ranked clusters including federal military, boat builders, electrical machinery, and abrasive products.

As shown in the accompanying map, there is a strong aerospace cluster evident in the Paine Field/Mukilteo region of WDA 4. Several industrial specialties are very important and exhibit relatively strong clustering tendencies, with a strong cluster near Monroe at the Highway 2 and 522 interchange. The Edmonds area, in the far southwest of this region, shows a concentration of firms in the Fishing cluster. Just northeast of Edmonds, the Lynnwood area shows a strong concentration of Industrial Specialty firms. The Forest Products cluster in WDA 4 is predominant primarily in the northern portion of Snohomish county, with especially strong concentrations in the Marysville and Arlington areas.

Figure 12: WDA4 Cluster Characteristics

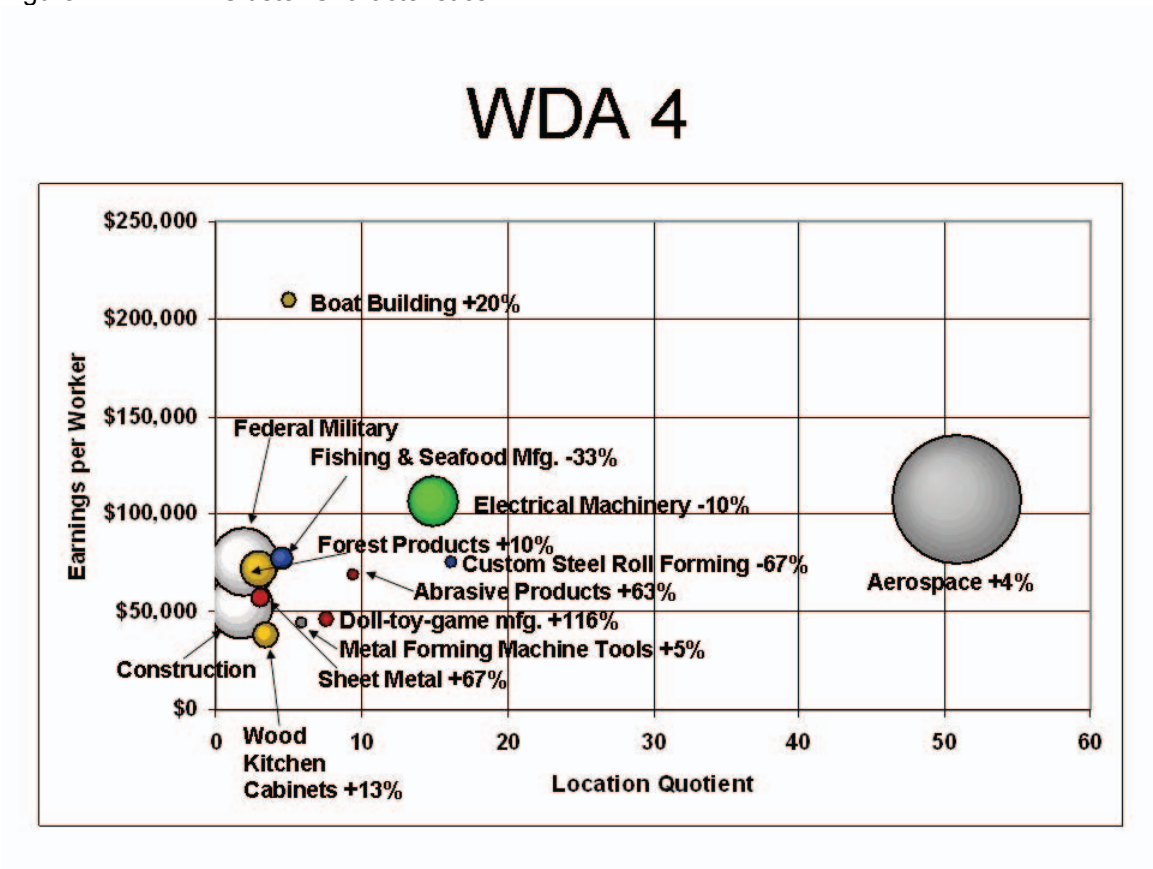

Figure 13: WDA4 Cluster Linkages

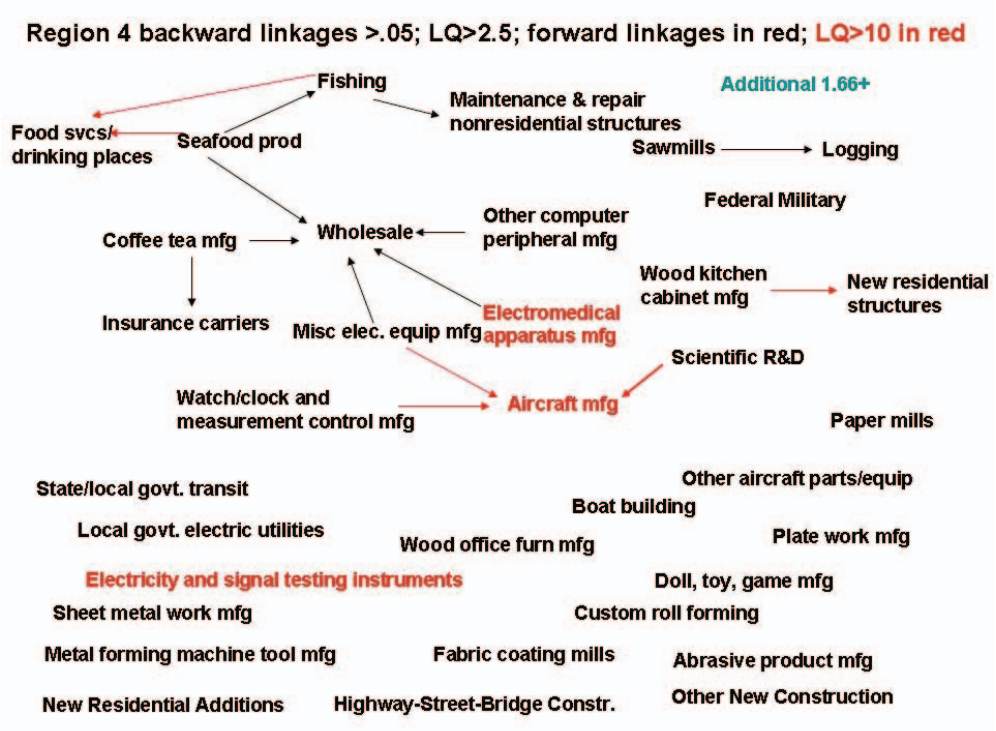

Table 10: Distribution of Occupational Median Wages in WDA 4

Wage Type	Annual Wages
Mean Wages	$45,831
Pct25 Wages	$26,225
Median Wages	$38,273
Pct75 Wages	$58,498

Table 11: Middle and High Wage Jobs by Cluster in WDA 4

Cluster	All Employment	Middle Wage Jobs	Percent Middle Wage Jobs	High Wage Jobs	Percent High Wage Jobs
Aerospace	30,588	6,014	20%	16,940	55%
Custom Steel Roll Forming	39	19	49%	7	18%
Electrical Machinery	3,734	1,033	28%	2,559	69%
Doll-Toy-Game Mfg.	734	532	72%	92	13%
Metal Forming Machine Tools	73	59	81%	14	19%
Boat Builders	1,296	736	57%	231	18%
Fisheries & Seafood Products	227	32	14%	18	8%
Wood Kitchen Cabinets	1,142	977	86%	105	9%
Sheet Metal Products	1,296	1,000	77%	233	18%
Forest Products	1,821	1,140	63%	219	12%
Other Construction	3,964	2,849	72%	970	24%
Cluster Total	196,654	76,115	39%	21,388	11%
All Industries	255,312	117,534	46%	54,803	21%
Clusters as % of All Industries	77%	65%			

Table 12: Strategic Evaluation of Clusters in Region 4

Cluster or Industry	LQ	Employment	Output ($ millions)	Earnings/ Worker	Percent of Occupations in Middle Wage Range	Percent of Occupations in High Wage Range	Chg Est 01-07	Chg Empl 01-07	Chg Wage 01-07	Projected Employment Increase 2006-16	R&D Occ'n. as % Empl.	Exports as % Output
Aerospace	50.86	26,549	13,221	107,959	20%	55%	-20.69%	4.35%	32.37%	19.44%	36.25%	82.43%
Custom Steel Roll Forming	16.13	192	86	75,911	49%	18%	-40.00%	-67.40%	-76.32%	3.65%	2.56%	98.78%
Electrical Machinery	14.86	4,060	1,585	106,905	28%	69%	-17.36%	-10.36%	17.20%	-18.83%	35.78%	67.70%
Abrasive Products Mfg.	9.44	183	56	69,672	*n/a*	*n/a*	162.50%	62.85%	83.82%	19.13%	4.67%	93.97%
Doll-Toy-Game Mfg.	7.61	360	88	46,536	72%	13%	16.77%	116.02%	245.81%	-7.22%	0.27%	38.39%
Metal Forming Machine Tools	5.81	181	29	45,138	81%	19%	12.50%	4.87%	37.46%	7.18%	9.59%	94.49%
Boat Builders	5.01	331	127	210,236	57%	18%	38.30%	19.60%	22.15%	-62.54%	6.40%	99.06%
Fisheries & Seafood Products	4.48	894	127	77,575	14%	8%	-43.27%	-32.61%	3.12%	3.58%	0.47%	56.77%
Wood Kitchen Cabinets	3.4	1030	158	38,678	86%	9%	-1.97%	12.86%	52.54%	1.84%	2.63%	60.10%
Sheet Metal Products	3.09	604	126	57,353	77%	18%	5.03%	66.79%	102.00%	26.54%	6.10%	97.91%
Forest Products	2.89	818	2,078	72,216	63%	12%	-1.89%	9.89%	37.09%	-11.48%	1.15%	85.29%
Federal Military	1.90	7,253	606	75,786	*n/a*	*n/a*	*n/a*	*n/a*	*n/a*	-0.59%	21.74%	100.00%
Other Construction	1.69	496	6,713	53,070	72%	24%	*n/a*	*n/a*	*n/a*	*n/a*	*n/a*	37.51%

Rankings

Cluster or Industry	LQ	Employment	Output ($ millions)	Earnings/ Worker	Percent of Occupations in Middle Wage Range	Percent of Occupations in High Wage Range	Chg Est 01-07	Chg Empl 01-07	Chg Wage 01-07	Projected Employment Increase 2006-16	R&D Occ'n. as % Empl.	Exports as % Output	Sum of Ranks*	Index (120-Summed Scores)
Aerospace	1	1	1	2	10	4	9	8	8	2	1	8	55	65
Custom Steel Roll Forming	2	11	11	5	8	8	10	11	11	5	9	3	94	26
Electrical Machinery	3	3	4	3	9	3	8	9	9	11	2	9	73	47
Abrasive Products Mfg.	4	12	12	8	6	1	1	3	3	3	7	6	66	54
Doll-Toy-Game Mfg.	5	9	10	11	4	10	3	1	1	9	12	12	87	33
Metal Forming Machine Tools	6	13	13	12	2	6	4	7	7	4	4	5	83	37
Boat Builders	7	10	7	1	7	9	2	4	4	12	5	2	70	50
Fisheries & Seafood Products	8	5	9	4	11	13	11	10	10	6	11	11	109	11
Wood Kitchen Cabinets	9	4	6	13	1	12	7	5	5	7	8	10	87	33
Sheet Metal Products	10	7	9	9	3	7	5	2	2	1	6	4	65	55
Forest Products	11	6	3	7	6	11	6	6	6	10	10	7	89	31
Federal Military	12	2	5	6	6	2	6	6	6	8	3	1	63	57
Other Construction	13	8	2	10	5	5	6		6	6.5	6.5	13	81	39

Note:
Missing data assigned the median rank value.
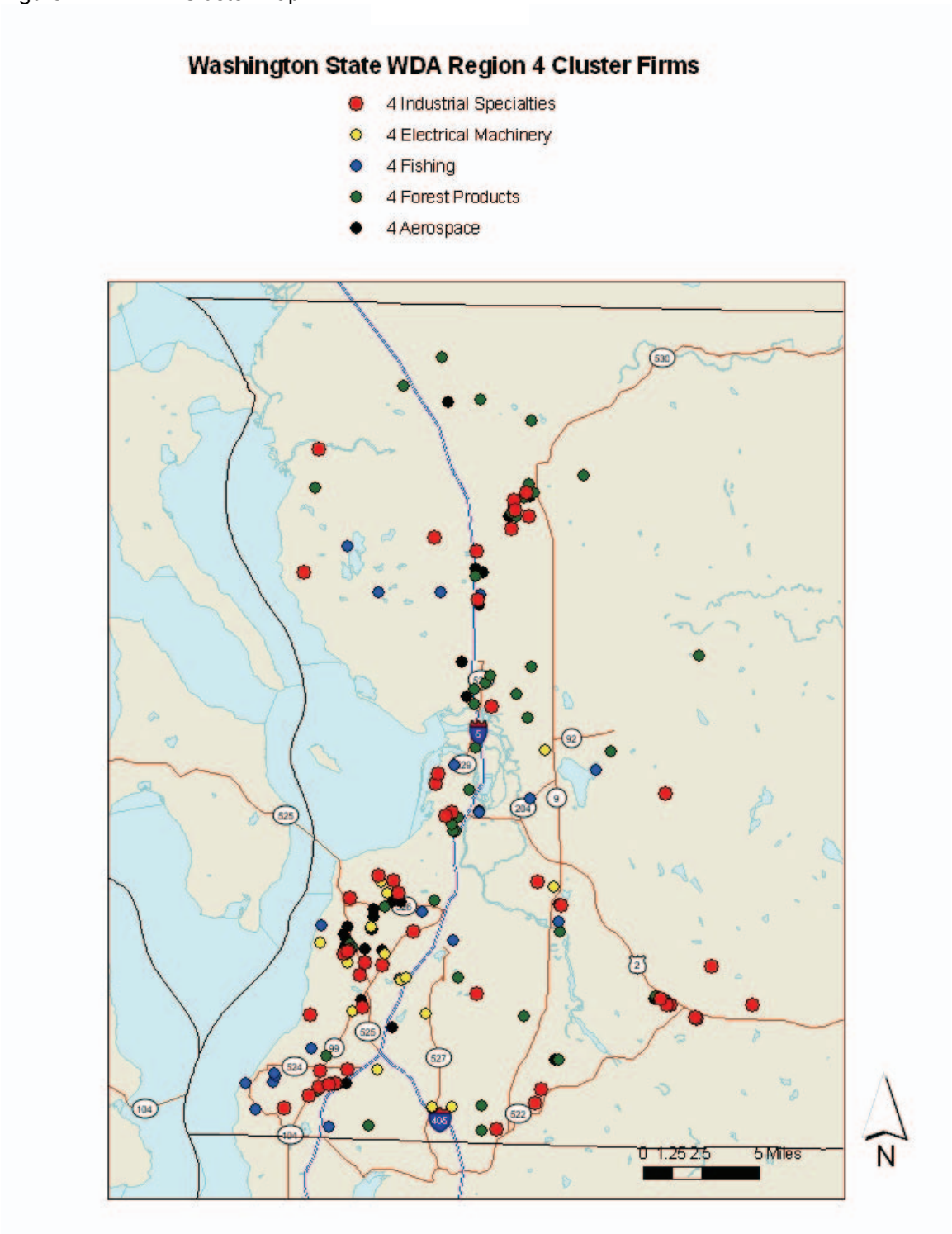
Figure 14: WDA4 Cluster Map