

*Investing in Portland's Future*

**PDC**

**PORTLAND DEVELOPMENT COMMISSION**

**Economic Development  
Biosciences  
Target Industry Plan**

Fiscal Year 2005/2006

November 25, 2005

## Biosciences

### Industry Definition/Summary

Oregon is home to a growing number of dynamic bioscience companies. The medical device and healthcare information technology sectors show energetic growth benefiting from interactions with Oregon's high technology and semiconductor industries. NIH funding, a measure of competitive bioscience research activity, has been increasing in Oregon faster than the national average in recent years. In 2002, Oregon ranked 23<sup>rd</sup> in total NIH funding and Portland ranked as the 31<sup>st</sup> city. Total NIH funding for 2002 was \$233.5 million.

The average number of jobs per company in the region is 17. The majority of the biosciences companies in the Portland region are small businesses. The average revenue for a biosciences company in the Portland region is \$9.6 million a year.<sup>1</sup>

Biosciences is made up of four primary industries. Listed below are the industries that make up the biosciences industry cluster.

- **Pharmaceutical & Medicine Manufacturing**
- **Medical Equipment & Supplies Manufacturing**
- **R & D in the Physical, Engineering, & Life Sciences**
- **Medical & Diagnostic Laboratories**

In addition to companies engaged in the biosciences industry, support and supplier industries play an integral role in helping the cluster function. A list of key support and supplier industries is listed in Appendix C with the estimated local contribution to Portland region biosciences industry.

### Employment Trends

First identified as a locally concentrated cluster in 2002 as part of a citywide economic development strategy, an estimated 5,736 jobs were attributed to biosciences in the Portland-Salem Metro area in 1997. Using the smaller geography of Clackamas, Multnomah and Washington counties, employment as of 2004 in biosciences is estimated to be 4,963 jobs. This is a nine percent increase from 2001 when employment for the cluster was an estimated 4,541.

Overall, the biosciences cluster is less concentrated in the 3-county Portland region than the West Coast states of California, Oregon and Washington. In 2001 biosciences had a local concentration<sup>2</sup> of 0.47. In 2004 the local concentration in the Portland region has increased to 0.50. This means that, on a percentage basis, the employment growth that has occurred in the Portland region from 2001 is more overall than what has been gained during the same period on the West Coast.

Within biosciences, the research and development sector is the largest employer in the Portland region (NAICS 54171). This sub-industry added 295 jobs between 2001 and 2004, growing by 18 percent. The medical equipment and supplies manufacturing sector (NAICS 33911) had the second largest number of jobs with 1,662 jobs in 2004 versus 1,393 in 2001. This sector had the greatest percentage growth during that period within the biosciences industry with nineteen percent growth from 2001 to 2004. Both of these sectors rapidly outpaced job growth on the West Coast.

After research and development and medical equipment and supplies manufacturing, medical and diagnostic laboratories are the next largest employer in the Portland region (NAICS 62151). In 2004 an estimated 867 jobs were in medical and diagnostic laboratories in the Portland region. This is a decrease from 2001 when an estimated 884 jobs were within the medical and diagnostic

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<sup>1</sup> Source: Dun & Bradstreet Marketing Solutions, July 2005.

<sup>2</sup> The local concentration ("location quotient" or LQ) is the calculated ratio between the local economy and the economy of some reference unit, in this case the West Coast states. This ratio is calculated for all industries to determine whether or not the local economy has a greater share of that industry than expected. If an industry has a greater share than expected of a given industry, then that "extra" industry employment is assumed to have a greater concentration and importance to the local economy because those jobs are above what a local economy should have to serve local needs. If an industry has a concentration of more than 1, it is assumed to be locally concentrated. Anything below 1 is not locally concentrated.

laboratories sub-industry. This decrease of 2 percent occurred in the Portland region while employment in the West Coast sub-cluster grew by 15 percent. The majority of the decrease in employment in biosciences occurred in pharmaceutical and medicine manufacturing (NAICS 32541). From 2001 to 2004 in pharmaceutical and medicine manufacturing in the Portland region lost 125 jobs for a decrease of 22 percent. At the same time pharmaceutical and medicine manufacturing expanded along the West Coast 7 percent.

Table 1 shows the employment and changes that have occurred from 2001 to 2004 in biosciences in the Portland region (Clackamas, Multnomah and Washington counties) compared to the West Coast (California, Oregon and Washington).

**Table 1**  
**Biosciences Employment Performance in the Portland Region from 2001 to 2004**

NAICS Code	Industry	2001 Employment		2004 Employment				West Coast % Change	Shift-share	LQ 2001	LQ 2004
		West Coast <sup>3</sup>	Portland Region <sup>4</sup>	West Coast	Portland Region	Portland Region Change	Portland Region % Change				
32541	Pharmaceutical & Medicine Mfg.	40,158	579	42,958	454	-125	-22%	7%	-0.29	0.33	0.25
33911	Medical Equipment & Supplies Mfg.	56,724	1,393	55,492	1,662	269	19%	-2%	0.21	0.56	0.71
54171	R & D: Physical, Eng. & Life Sciences	101,265	1,685	106,303	1,980	295	18%	6%	0.12	0.38	0.44
62151	Medical & Diagnostic Laboratories	24,944	884	28,700	867	-17	-2%	15%	-0.17	0.81	0.71
<b>Biosciences Total</b>		<b>233,091</b>	<b>4,541</b>	<b>234,044</b>	<b>4,963</b>	<b>422</b>	<b>9%</b>	<b>5%</b>	<b>0.04</b>	<b>0.47</b>	<b>0.50</b>

Source: Oregon Labor Market Information System Covered Employment and Wages; U.S. Department of Labor Bureau of Labor Statistics

<sup>3</sup> West Coast includes the States of California, Oregon and Washington.

<sup>4</sup> Portland region includes Clackamas, Multnomah and Washington counties.

## **Wages**

The average annual wage paid in the Portland region by the biosciences cluster in 2004 was \$50,982. This is significantly lower than the average wage paid in biosciences for the West Coast. The average wage paid in the Portland region in biosciences in 2004 is 17 percent higher than the annual wage of \$43,497 paid in 2001. At the same time, West Coast annual wages increased 10 percent from \$67,781. This means that while Portland biosciences wages are lower than the West Coast states as a whole, wage increases in our region have been rising more rapidly than wages elsewhere on the West Coast.

Within biosciences, research and development has the highest wages in the Portland region. In 2004, research and development had an average wage of \$62,304 in the Portland area compared to \$86,789 for the West Coast. Wages for workers at medical and diagnostic laboratories paid second highest within the cluster and also paid the highest on the West Coast with average wages of \$57,029 compared to \$46,732 average on the West Coast. Wages within these two sectors of the regional biosciences cluster rapidly outpaced their West Coast counterparts with wage increases of twenty-five percent in research and development in Portland versus twelve percent on the West Coast and twenty-one percent growth in medical and diagnostic laboratories versus four percent elsewhere on the West Coast between 2001 and 2004.

Average wages in medical equipment & supplies manufacturing remained lower in the Portland region than elsewhere on the West Coast in 2004 at \$37,908 compared to \$59,842. Wages within this sector increased at a slower pace in the Portland region than elsewhere on the West Coast with 11 percent growth versus 16 percent. In the pharmaceutical and medicine manufacturing sub-industry, average wages declined by nine percent between 2001 and 2004, with an average loss of \$3,809 per job. The Portland region average wage of \$37,917 in this sub-industry in 2004 was less than half the average wage elsewhere on the West Coast where it was \$80,647. While Portland saw a decline in wages in this sub-industry, elsewhere on the West Coast the wages remained unchanged between 2001 and 2004.

Table 2 compares 2001 and 2004 Portland area average wages to the West Coast along with the change for the biosciences industry.

**Table 2**  
**Biosciences Wage Performance in the Portland Region from 2001 to 2004**

NAICS Code	Industry	2001 Avg Wage		2004 Avg Wage		Portland Region Change	West Coast Change	Portland Region % Change	West Coast % Change
		West Coast	Portland Region	West Coast	Portland Region				
32541	Pharmaceutical & Medicine Mfg.	\$80,305	\$41,726	\$80,647	\$37,917	-\$3,809	\$343	-9%	0%
33911	Medical Equipment & Supplies Mfg.	\$51,729	\$34,124	\$59,842	\$37,908	\$3,784	\$8,112	11%	16%
54171	R & D: Physical, Eng. & Life Sciences	\$77,483	\$50,009	\$86,798	\$62,304	\$12,294	\$9,315	25%	12%
62151	Medical & Diagnostic Laboratories	\$44,733	\$47,016	\$46,732	\$57,029	-\$1,093	\$3,785	21%	4%
<b>Biosciences Total</b>		<b>\$67,781</b>	<b>\$43,497</b>	<b>\$74,365</b>	<b>\$50,982</b>	<b>\$7,484</b>	<b>\$6,584</b>	<b>17%</b>	<b>10%</b>

Source: Oregon Labor Market Information System Covered Employment and Wages; U.S. Department of Labor Bureau of Labor Statistics

## Observations

Overall, the biosciences industry in the Portland region is ahead of nationwide and West Coast employment trends. From 2001 to 2004 biosciences employment throughout the United States grew by 3 percent. Throughout the West Coast, with the exception of Oregon, where employment in biosciences increased 10 percent, employment grew by 5 percent. Biosciences employment growth in the Portland region was slightly lower than the state as a whole, with 9 percent growth between 2001 and 2004. Table 3 shows the employment and change for biosciences throughout the United States compared to the West Coast, Oregon and the Portland region.

**Table 3**  
**Biosciences Employment and Change in the United States, West Coast, Oregon and Portland Region from 2001 to 2004**

Region	Employment			
	2001	2004	Change	% Change
<b>United States</b>	1,224,443	1,262,343	37,900	3%
<b>West Coast</b>	223,091	234,044	10,953	5%
<b>Oregon</b>	7,956	8,783	827	10%
<b>Portland Region</b>	4,541	4,963	422	9%

Source: Oregon Labor Market Information System Covered Employment and Wages; U.S. Department of Labor Bureau of Labor Statistics

The growth in employment from 2001 to 2004 in the Portland area for biosciences was greater than occurred throughout the West Coast. At the same time, Oregon employment across all industries increased 3 percent. Jobs in the biosciences grew by 9 percent in the Portland region, while overall the region lost nearly 2 percent of its employment. The same is also true when the biosciences industry is compared to all West Coast industries where employment had only a slight increase (1.4 percent). Table 4 compares biosciences to overall employment trends from 2001 to 2004 in the Portland region, Oregon and the West Coast.

**Table 4**  
**Biosciences Employment in the Portland Region Compared to all other Industries 2001 to 2004**

Region	Employment			
	2001	2004	Change	% Change
<b>West Coast</b>	16,220,942	16,451,478	230,536	1.4%
<b>Oregon</b>	1,343,430	1,383,822	40,392	3.0%
<b>Portland Region</b>	709,876	696,532	-13,344	-1.9%
<b>Biosciences</b>	4,541	4,963	422	9%

Source: Oregon Labor Market Information System Covered Employment and Wages; U.S. Department of Labor Bureau of Labor Statistics

Overall, biosciences had a significant gain in wages in the Portland region at 17 percent, while throughout the West Coast wages increased 10 percent. While the bulk of the industry's growth has been and is expected to continue to be locally grown, the growth of the research and development and medical equipment and supplies manufacturing sectors may offer benefits to recruitment prospects considering the Portland region.

Since Portland is beginning to see signs of an economic turn around, it may be time to capitalize on its these advantages through retention, expansion and recruitment efforts. Since 2002, state and regional recruitment efforts related to the biosciences industry have focused on the pharmaceutical and medicine manufacturing sub-industry through attendance at the Biotechnology Industry Organization conferences in 2004 and 2005. While this sector is

anticipated to grow nationally in the next decade, regional employment has been declining since 2001. At the same time, growth within the three other sectors of this industry has been rapidly outpacing national employment trends. While this strategy includes the pharmaceutical and medicine manufacturing sub-industry, economic development efforts should focus on the industry sectors with the greatest number of jobs and growth potential: medical equipment & supplies manufacturing; research and development; and, medical and diagnostic laboratories.

### **Workforce**

According to the Oregon Employment Department, employment in biosciences is expected to grow in Oregon through 2014. Within biosciences, there has been recent strong growth in research and development and medical equipment and supplies manufacturing and the growth is expected to continue as the aging of the baby boomer population continues and FDA regulations guarantee that manufacturing activities take place within the United State. Additionally, China and other Asian markets offer additional potential future growth opportunities for these sub-industries.

Portland region (Clackamas, Multnomah and Washington counties) employment is expected to grow by over 16 percent from 2004 through 2014. The biosciences industries are not expected to meet this growth, with estimated average growth of close to 8 percent during this period.

Occupational needs in biosciences will continue to be primarily high-skilled professional positions. A smaller number of the jobs are mid-level, especially those in the pharmaceutical and medicine manufacturing sub-industry. Most of these positions require significant educational prerequisites, including advanced degrees.

The Regulatory Affairs Managers are especially significant. As FDA regulations have become increasingly complex and time-dependent, more of the industry is involved in FDA approval of products. Upcoming efforts will focus on bringing FDA training to the Portland region and Oregon through critical partnerships within Washington State.

Below are the top occupational categories for biosciences, in alphabetical order. Those in bold are considered the toughest positions to fill.

#### **Top Occupational Categories for Biosciences**

• Agricultural and Food scientists
• Biomedical Engineers
• Biochemists and Biophysicists
• Medical Scientists
• Microbiologists
• <b>Production/Manufacturing</b>
• <b>Quality Assurance</b>
• <b>Research and Development</b>
• <b>Technical Assistance</b>

Source: Strategy for Economic Vitality, Portland 2002; Portland Development Commission Workforce Gap Analysis Report for the Portland-Vancouver MSA, June 2005; Anecdotal information supplied by key stakeholders.

### **Implementation**

The primary goals of strategy implementation are job retention and expansion, wealth creation and business support. The Portland Development Commission plays a support role to the biosciences by promoting industry initiatives, supplying financial assistance and by participating in business outreach efforts. Throughout the next fiscal year, the PDC will work with its partners in

helping to foster a positive business climate for the biosciences industry in the Portland region and throughout the State of Oregon.

The Portland region has a competitive advantage in biosciences. Simple geography, coupled with an extensive multi-modal network allows Portland businesses to move goods throughout the world. Noting Portland's competitive advantage, along with other factors that affect overall biosciences' business helps to assess what actions the PDC can undertake to support the biosciences industry. Below is a listing of factors that the PDC recognizes it can help affect in promoting the biosciences, along with a list of factors that are more difficult to change.

**Biosciences business factors that the PDC can help affect:**

- Business & economic climate
- Distribution & logistics business development
- Financing
- Government Policy
- Industry advocacy
- Industry Networking
- Industry support and coalescence
- Land use issues
- Permitting
- Recruitment
- Retention and expansion of existing biosciences businesses
- Transportation initiatives
- Workforce development

**Biosciences business factors that is difficult to change:**

- Access to markets
- Availability of space
- Competition
- Escalating real estate costs
- Global and national economic conditions
- Physical barriers
- Roadway and other transportation infrastructure
- Technology transfer

Strategy goals were developed for the biosciences strategy in 2002 for the City of Portland to implement. Many of the goals listed were of a supporting nature and the City's future role will continue to be in this manner. Previous strategy goals included:

- Become a research powerhouse
- Attract researchers who increase OHSU's scientific impact
- Create centers of clinical and research expertise
- Ensure the availability of space and equipment
- Maximize the number of commercially viable discoveries
- Grow a biotechnology industry in Oregon

These bullet points will be ongoing efforts to help the biosciences industry in Portland. Other goals to focus on for biosciences are:

- Workforce development for an adequate employment pool
- Job creation through business expansion
- Supplier and support industry retention, expansion and recruitment

## **Action Items for Biosciences**

In order to achieve the goals and further support the biosciences industry, the PDC will perform the following actions to help support the industry.

- Work with private and public sector partners to recruit bioscience firms to Oregon and the Portland metro region
- Participation in public/private industry discussion with OECDD, OHSU and private sector industry representatives (December 7, 2005) to discuss current and future industry initiatives
- Support OECDD/ WorkSystems Inc workforce training initiative for biosciences jobs
- Update marketing materials for biosciences in Portland region
- Work with OBA, OECDD and other industry partners to attract venture capital to Oregon.
- Increased coordination with the Washington Biotechnology & Biomedical Association
- Work with OHSU and the Oregon Biosciences Association to develop a plan that will lead to the development of speculative wet laboratory space to be made available for OHSU spin-offs and smaller biotech start-ups as well as recruitment prospects
- Presence at the following events: BioPartnering North America, February 2006; Invest Northwest 2006; Nanotech/Nano Bio Conference, May 2006
- Planning with OHSU, OECDD and the Oregon Biosciences Association for Portland and Oregon industry representation at Medica 2006 and BIO 2007 trade shows

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**Appendix A**  
**Top 50 (by revenue) Biosciences Companies in Portland region**

Business Name	Industry
<b>A-Dec Inc</b>	Dental Equipment and Supplies
<b>RS Medical</b>	Surgical and Medical Instruments
<b>Exelis Plant Sciences Inc</b>	Commercial Physical Research
<b>Welch Allyn Monitoring</b>	Surgical and Medical Instruments
<b>Sharp Laboratories of America Inc</b>	Commercial Physical Research
<b>First Aid Only Inc</b>	Surgical Appliances and Supplies
<b>PML Microbiologicals Inc</b>	Surgical and Medical Instruments
<b>Oregon Regional Primate Res. Ctr</b>	Noncommercial Research Organization
<b>A Colson Associates</b>	Surgical Appliances and Supplies
<b>Thortex</b>	Surgical and Medical Instruments
<b>Magno-Humphries Inc</b>	Pharmaceutical Preparations
<b>Optical Plastics Inc</b>	Ophthalmic Goods
<b>Coherent Group</b>	Electromedical Equipment
<b>Nutrition Now Inc</b>	Pharmaceutical Preparations
<b>Bioject Inc</b>	Surgical and Medical Instruments
<b>Tidepool</b>	Commercial Physical Research
<b>World Class Technology Corp</b>	Dental Equipment and Supplies
<b>Steridian Corporation</b>	Commercial Physical Research
<b>MML Diagnostics Packaging Inc</b>	Biological Products
<b>LSM Dental</b>	Dental Equipment and Supplies
<b>Nlight Photonics Corporation</b>	Commercial Physical Research
<b>Beaverstate Dental Inc</b>	Dental Equipment and Supplies
<b>Open Advanced MRI</b>	Medical Laboratories
<b>Alpha Tec Systems Inc</b>	Medicinals and Botanicals
<b>Cappseals Inc</b>	Pharmaceutical Preparations
<b>Cascade Cytology Reference Labs</b>	Medical Laboratories
<b>Cardinal Nutrition</b>	Pharmaceutical Preparations
<b>Bioshark Systems</b>	Biological Products
<b>Active Open Imaging LLC</b>	Medical Laboratories
<b>Cascade Biologics Inc</b>	Biological Products
<b>Hemcon Inc</b>	Surgical Appliances and Supplies
<b>Zygo Industries Inc</b>	Surgical Appliances and Supplies
<b>Neurocom International Inc</b>	Surgical and Medical Instruments
<b>NPC Research</b>	Noncommercial Research Organization
<b>Oregon Aero Inc</b>	Surgical Appliances and Supplies
<b>Ocean Research &amp; Exploration Intl</b>	Noncommercial Research Organization
<b>Procedure Products Corp</b>	Surgical and Medical Instruments
<b>Herbal Concepts Inc</b>	Pharmaceutical Preparations
<b>Engle Dental Systems Inc</b>	Dental Equipment and Supplies
<b>Bonneville Environmental Foundation</b>	Commercial Physical Research
<b>American Tinnitus Foundation</b>	Noncommercial Research Organization
<b>Prio Corporation</b>	Surgical and Medical Instruments
<b>NF Formulas</b>	Medicinals and Botanicals
<b>Sustainable Ecosystems Institute</b>	Commercial Physical Research
<b>Transitional Research Center</b>	Noncommercial Research Organization
<b>Hocks Hearing Healthcare</b>	Surgical Appliances and Supplies
<b>Innovite Inc</b>	Medicinals and Botanicals
<b>Lifeline First Aid LLC</b>	Surgical Appliances and Supplies
<b>Battelle Pacific NW Natural Labs</b>	Commercial Physical Research

Source: Dun & Bradstreet Marketing Solutions, August 2005.

**Appendix B**  
**Top 50 (by employment) Biosciences Companies in Portland region**

<b>Business Name</b>	<b>Industry</b>
<b>A-Dec Inc</b>	Dental Equipment and Supplies
<b>RS Medical</b>	Surgical and Medical Instruments
<b>Exelis Plant Sciences Inc</b>	Commercial Physical Research
<b>Quest Diagnostics</b>	Medical Laboratories
<b>Welch Allyn Monitoring</b>	Surgical and Medical Instruments
<b>Kaiser Foundation</b>	Noncommercial Research Organization
<b>Oregon Regional Primate Res. Ctr</b>	Noncommercial Research Organization
<b>Sharp Laboratories of America Inc</b>	Commercial Physical Research
<b>Vollum Institute</b>	Medical Laboratories
<b>First Aid Only Inc</b>	Surgical Appliances and Supplies
<b>Fiserv</b>	Noncommercial Research Organization
<b>A Colson Associates</b>	Surgical Appliances and Supplies
<b>Magno-Humphries Inc</b>	Pharmaceutical Preparations
<b>Starkey Northwest</b>	Surgical Appliances and Supplies
<b>PML Microbiologicals Inc</b>	Biological Products
<b>Thorntex</b>	Surgical and Medical Instruments
<b>Oregon Health &amp; Sciences Univ</b>	Noncommercial Research Organization
<b>MML Diagnostics Packaging Inc</b>	Biological Products
<b>Coherent Group</b>	Electromedical Equipment
<b>Eclectic Institute</b>	Pharmaceutical Preparations
<b>Bioject Inc</b>	Surgical and Medical Instruments
<b>Open Advanced MRI</b>	Medical Laboratories
<b>Nutrition Now Inc</b>	Pharmaceutical Preparations
<b>RTI</b>	Commercial Physical Research
<b>Laerdal Manufacturing</b>	Electromedical Equipment
<b>Optical Plastics Inc</b>	Ophthalmic Goods
<b>Nlight Photonics Corporation</b>	Commercial Physical Research
<b>AVI Biopharma Inc</b>	Pharmaceutical Preparations
<b>Clinical Genetics</b>	Medical Laboratories
<b>LSM Dental</b>	Dental Equipment and Supplies
<b>Hemcon Inc</b>	Surgical Appliances and Supplies
<b>Oregon Medical Laser Center</b>	Noncommercial Research Organization
<b>World Class Technology Corp</b>	Dental Equipment and Supplies
<b>Synarc Inc</b>	Commercial Physical Research
<b>Alpha-Tec Systems Inc</b>	Medicinals and Botanicals
<b>RS Dow Neurological Sciences Inst</b>	Noncommercial Research Organization
<b>RMC Research Corporation</b>	Noncommercial Research Organization
<b>Cappseals Inc</b>	Pharmaceutical Preparations
<b>Zygo Industries Inc</b>	Surgical Appliances and Supplies
<b>Columbia Nutritional Service</b>	Pharmaceutical Preparations
<b>Cardinal Nutrition</b>	Pharmaceutical Preparations
<b>Tidepool</b>	Commercial Physical Research
<b>NPC Research</b>	Noncommercial Research Organization
<b>Virginia Garcia Mem Fmly Planning</b>	Medical Laboratories
<b>Daimler-Chrysler Res &amp; Tech</b>	Commercial Physical Research
<b>Cascade Biologics Inc</b>	Biological Products
<b>Ocean Research &amp; Exploration Intl</b>	Noncommercial Research Organization
<b>Beaverstate Dental Inc</b>	Dental Equipment and Supplies
<b>Oregon Aero</b>	Surgical Appliances and Supplies
<b>Portland Tissue Processing Lab</b>	Medical Laboratories

Source: Dun & Bradstreet Marketing Solutions, August 2005