



CLATSOP COUNTY PLANNING COMMISSION REGULAR MEETING AGENDA

Judge Guy Boyington Building, 857 Commercial St., Astoria

Tuesday, May 13, 2025 at 10:00 AM

ZOOM MEETING INSTRUCTIONS

- [1.](#) Zoom Instructions

CALL MEETING TO ORDER

FLAG SALUTE

ROLL CALL

ADOPT AGENDA

BUSINESS FROM THE PUBLIC: This is an opportunity for anyone to give a brief presentation about any land use planning issue or county concern that is not on the agenda.

PUBLIC HEARINGS

- [2.](#) Ordinance 25-07: Clatsop County Economic Opportunities Analysis 2025

PROJECT STATUS REPORT

- [3.](#) May Project Status Report

DIRECTOR'S REPORT

- [4.](#) [May](#) 2025 Director's Report

GOOD OF THE ORDER

ADJOURN

NOTE TO PLANNING COMMISSION MEMBERS: Please contact the Community Development Department (503-325-8611) if you are unable to attend this meeting.



Clatsop County

Community Development – Planning

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Clatsop County Planning Commission Regular Hybrid Zoom Meeting Instructions

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Hi there,

You are invited to a zoom webinar.

WHEN: May 13, 2025, 10:00 AM Pacific Time (US and Canada)

TOPIC: Planning Commission

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Clatsop County – Land Use Planning

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TO: Planning Commission

FROM: Jay Blake, Planning Manager

DATE: May 13, 2025

RE: **Public Hearing - Type IV Review Process**
Ordinance 25-07 Economic Opportunities Analysis (EOA) Addendum to 2023
Goal 9 Economic Development Plan

PROJECT OVERVIEW

The Planning Commission is asked to conduct a public hearing pursuant to LAWDUC Section 2.1050 and to consider a recommendation to the Clatsop County Board of Commissioners for adoption of the 2025 Clatsop County Economic Opportunities Analysis (EOA). This document is an addendum to the 2023 Clatsop County Goal 9 Economic Development Plan.

PUBLIC REVIEW PROCESS

The County appointed a technical advisory committee (TAC) to assist with guiding the research and analysis of economic conditions and trends. The TAC met five times to review the data and develop recommendations for implementation steps. A community questionnaire was developed and results added to the findings within the EOA document. A draft EOA was reviewed at two public open houses and presentations made to the five municipalities, chambers of commerce and business groups within the county.

PLANNING COMMISSION WORK SESSIONS

The preliminary data, findings, and recommendations were presented to the Planning Commission in work sessions on July 9, 2024, November 11, 2024, and February 11, 2025

BOARD OF COMMISSIONERS WORK SESSION

Work session presentations were made to the Clatsop County Board of Commissioners March 27, 2024, July 24, 2024, September 4, 2024, and April 2, 2025.

PLAN CONTENTS:

The Clatsop County EOA is designed to analyze current economic conditions and future economic trends leading to community economic goals and implementation steps.

The plan identifies four growth sectors on which future planning and investment should be prioritized:

Blue Marine Economy Sector: Fisheries, Food Processing, Natural Resources Research and Innovation, Tourism, Marine Construction and Repair

Healthcare and Wellness Sector: Hospital Systems, Health Service Expansion, Living/Care Facilities, Healthcare and Wellness Businesses,

Construction and Resources Sector: Trades Education Programs, Apprenticeships, Timber Resource Research and Development

Food Processing Sector: Seafood Processing, Brewing and Distilling Businesses, Farming Operations,

These growth sectors are highlighted because:

1. The sector has a presence in the past and present economies,
2. State employment projections identify growth in these sectors,
3. Oregon identified several of these sectors for future state investment,
4. Public support through the community questionnaire.

The Plan is organized into five sections:

- Section 1. Introduction
- Section 2. Current Economic Indicators
- Section 3. Future Economic Trends
- Section 4. Economic Drivers
- Section 5. Goal Statements and Implementation Steps

NEXT STEPS

The Planning Commission has options available regarding these proposed code amendments:

- Continue the item to a date certain to conduct additional review or to allow staff to properly address questions or concerns
- Table the item indefinitely
- Recommend the Board of Commissioners adopt the code amendments as presented
- Recommend the Board of Commissioners adopt the code amendments as revised by your commission
- Recommend the Board of Commissioners deny the code amendments

If the Planning Commission chooses to recommend the Board of Commissioners consider the proposed code amendments, the ordinance would be tentatively scheduled for two public hearings with the Board on June 11, 2025 and June 25, 2025.

STAFF RECOMMENDATION

Staff recommends that the Planning Commission recommend the Board of Commissioners approve Ordinance 25-07 **An Ordinance adopting the Clatsop County Economic Opportunities Analysis as a supporting document to Clatsop County’s Comprehensive Plan.**

Suggested Motion: “I recommend that the Board of Commissioners adopt Ordinance 25-07 as presented by staff.”

EXHIBITS

Exhibit A: Ordinance 25-07

**BEFORE THE BOARD OF COMMISSIONERS
FOR THE COUNTY OF CLATSOP**

In the Matter of:

An Ordinance adopting the Clatsop County Economic Opportunities Analysis and incorporating the findings and recommendations into the Clatsop County Goal 9 Economic Development document

ORDINANCE NO. 25-07

Doc # _____

Recording Date: _____

RECITALS

WHEREAS, the Oregon State Legislature approved Senate Bill 100 on May 29, 1973, creating the Land Conservation and Development Commission and establishing the foundation for the statewide land planning system; and

WHEREAS, the Board of Clatsop County Commissioners adopted its original Goal 9 Economic Development plan on July 23, 1980 and amended on September 30, 1983; and

WHEREAS, the Board of Clatsop County Commissioners adopted an updated Goal 9 Plan on June 28, 2023, as part of the Clatsop County 2040 Plan Update; and

WHEREAS, Clatsop County desired to increase its understanding of its economy and future economic trends and recommended in General Policy A that it would be advantageous for the county to explore an economic opportunities analysis as allowed by ORS; and

WHEREAS, the Board of Clatsop County Commissioners initiated an Economic Opportunities Analysis (EOA) process in 2023; and

WHEREAS, the public involvement and planning process has resulted in the development of an EOA that represents a local review of national, state and regional economic trends; and

WHEREAS, the extensive public involvement included the appointment of 30-member technical advisory committee, public outreach meetings, a community questionnaire, public review meetings and multiple public hearings; and

WHEREAS, the Board of Clatsop County Commissioners reviewed the draft findings and recommendations In April, July and September of 2024 and in April of 2025; and

WHEREAS, the Clatsop County Planning Commission held a public hearing on these documents on May 13, 2025; and

Ordinance 25-07

1st Public Hearing: June 11, 2025

Agenda Item # 2.

Agenda Item # 2.

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WHEREAS, the Board of Commissioners has received and considered the Planning Commission’s recommendations on these proposed amendments at public hearings on June 11, 2025 and _____, 2025; and

WHEREAS, The County board finds that the recommendations for goals and action steps augment its original findings in the Goal 9 update Dated June 28, 2023, and that EOA should be used in conjunction with the comprehensive plan policy statements.

THE BOARD OF COMMISSIONERS OF CLATSOP COUNTY ORDAINS AS FOLLOWS:

SECTION 1. ADOPTION

The Board of County Commissioners hereby adopts the Clatsop County Economic Opportunities Analysis as shown in Exhibit 1, attached hereto and incorporated herein by this reference. This document supports and supplements the Goal 9 Policy statements.

SECTION 2. SEPARABILITY

The provisions of this ordinance are severable. If any portion of this ordinance is for any reason held to be invalid, such decision shall not affect the validity of the remaining portions of this ordinance.

SECTION 3. CONFORMANCE OF STATE LAW

This Ordinance shall not substitute for nor eliminate the necessity for conformity with any and all laws or rules of the state of Oregon, or its agencies, or any ordinance, rule, or regulation of Clatsop County.

SECTION 4. INCONSISTENT PROVISIONS

This Ordinance shall supersede, control and repeal any inconsistent provision of any County Ordinance as amended or any other regulations made by Clatsop County.

SECTION 5. APPLICABILITY

This Ordinance shall apply within the unincorporated areas of Clatsop County but shall not apply within the boundaries of any incorporated City.

SECTION 6. EFFECTIVE DATE

This Ordinance shall take effect on the 30th day following adoption by the Board of Commissioners as provided in Chapter III, Section 8(B) of the Home Rule Chapter for the Government of Clatsop County.

Approved this ____ day of _____, 2025

THE BOARD OF COUNTY COMMISSIONERS
FOR CLATSOP COUNTY, OREGON

By _____
Mark Kujala, Chair

Date _____

By _____
Theresa Dursse, Recording Secretary

First Reading: June 11, 2025
Second Reading:
Effective Date:

EXHIBIT 1

Ordinance 25-07
1st Public Hearing: June 11, 2025

Agenda Item # 2. ng:

RESOURCEFUL CLATSOP COUNTY



Economic Opportunities Analysis - 2025



Acknowledgements

Resourceful Clatsop County: An Economic Opportunity Analysis was prepared with the guidance and assistance of the following groups and individuals:

Clatsop County Board of Commissioners

Commissioner Mark Kujala, Chair (District 1)
Commissioner Courtney Bangs, Vice Chair (District 4)
Commissioner Anthony Huacuja (District 2)
Commissioner Pamela Wev (District 3)
Commissioner Lianne Thompson (District 5)

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Terms and Definitions

ABBREVIATIONS

The following abbreviations are used throughout the EOA document:

CEDR	Clatsop Economic Development Resources
COLPAC	Columbia Pacific Economic Development District
CTE	Career and Technical Education
DLCD	Oregon Department of Land Conservation and Development
DOGAMI	Oregon Department of Geology and Mineral Industries
DSL	Oregon Department of State Lands
EOA	Economic Opportunities Analysis
FEMA	Federal Emergency Management Agency
FEMA BiOp	FEMA Biological Opinion – Endangered Special Act Implementation Procedures
GDP	Gross Domestic Product
HCP	Oregon Habitat Conservation Plan
HUD	U. S. Department of Housing and Urban Development
LAWDUC	Clatsop County Land and Water Development and Use Code
LQ	Location Quotient
MERTS	Clatsop Community College Marine and Environmental Research and Training Station
NAICS	North American Industry Classification System
OAR	Oregon Administrative Rules
ODOT	Oregon Department of Transportation
OED	Oregon Employment Department
OHA	Oregon Health Authority
ORS	Oregon Revised Statutes
OSU	Oregon State University
PMA	Portland Metropolitan Area
PSU	Portland State University
RHTF	Clatsop County Regional Housing Task Force
SB 100	Senate Bill 100 (State Planning Regulations)
SBDC	Small Business Development Center
TAC	Technical Advisory Committee
UGB	Urban Growth Boundary
USAC	United States Army Corps of Engineers
USCG	United States Coast Guard
USGS	United States Geological Survey

TERMS AND DEFINITIONS

DEFINITIONS

DEVELOPED LAND – Non-vacant land that is likely to be redeveloped during the planning period.

DEVELOPMENT CONSTRAINTS – Factors that temporarily or permanently limit or prevent the use of land for economic development. Development constraints include, but are not limited to, wetlands, environmentally sensitive areas such as habitat, environmental contamination, slope, topography, cultural and archaeological resources, infrastructure deficiencies, parcel fragmentation, or natural hazard areas.

GROSS DOMESTIC PRODUCT - the standard measure of the value added created through the production of goods and services within a country, state or other geographic area.

INDUSTRIAL USE – Employment activities generating income from the production, handling, or distribution of goods. Industrial uses include, but are not limited to: manufacturing; assembly; fabrication; processing; storage; logistics; warehousing; importation; distribution and transshipment; and research and development. Industrial uses may have unique land, infrastructure, energy, and transportation requirements. Industrial uses may have external impacts on surrounding uses and may cluster in traditional or new industrial areas where they are segregated from other non-industrial activities.

LOCATIONAL FACTORS – Market factors that affect where a particular type of industrial or other employment use will locate. Locational factors include, but are not limited to, proximity to raw materials, supplies, labor, services, markets, or educational institutions; access to transportation and freight facilities such as rail, marine ports and airports, multimodal freight or transshipment facilities, and major transportation routes; and workforce factors (e.g., skill level, education, age distribution).

NORTHWEST OREGON REGION – a designation or grouping of counties in northwest Oregon by which economic data is categorized by the Oregon Employment Department. It includes Benton, Clatsop, Columbia, Lincoln and Tillamook Counties.

OREGON URBAN COMMUNITIES – The 13 counties that make up Oregon’s’ eight Metropolitan Statistical Areas (MSAs) as defined by the US Census, including Multnomah/Washington/Columbia, Clackamas/Yamhill Counties (Portland/Vancouver MSA), Jackson/Josephine Counties (Medford-Grants Pass), Lane County (Eugene-Springfield), Marion/Polk Counties (Salem), Benton County (Corvallis), Linn County (Albany/Lebanon), Deschutes County (Bend)

OTHER EMPLOYMENT USE – All non-industrial employment activities including the widest range of retail, wholesale, service, non-profit, business headquarters, administrative and governmental employment activities that are accommodated in retail, office and flexible building types. Other employment uses also include employment activities of an entity or organization that serves the medical, educational, social service, recreation and security needs of the community typically in large buildings or multi-building campuses.

TERMS AND DEFINITIONS

PLANNING AREA – The area within an existing or proposed urban growth boundary. Cities and counties with urban growth management agreements must address the urban land governed by their respective plans as specified in the urban growth management agreement for the affected area.

PRIME INDUSTRIAL LAND – Land suited for traded-sector industries as well as other industrial uses providing support to traded-sector industries. Prime industrial lands possess site characteristics that are difficult or impossible to replicate in the planning area or region. Prime industrial lands have necessary access to transportation and freight infrastructure, including, but not limited to, rail, marine ports and airports, multimodal freight or transshipment facilities, and major transportation routes. Traded-sector has the meaning provided in ORS 285B.280.

RECREATIONAL COUNTIES – A United State Department of Agriculture (USDA) term for counties meeting criteria including employment rates, tourism-based earning, and the percentage of vacant housing units intended for seasonal or occasional use. In Oregon there are 8 counties meeting this definition, including Clatsop County.

SERVICEABLE – Public facilities and transportation facilities, as defined by OAR 660, divisions 011 and 012, currently have adequate capacity for development planned in the service area where the site is located or can be upgraded to have adequate capacity within the 20-year planning period.

SHORT-TERM SUPPLY OF LAND – Suitable land that is ready for construction within one year of an application for a building permit or request for service extension. Engineering feasibility is sufficient to qualify land for the short-term supply of land. Funding availability is not required. “Competitive Short-term Supply” means the short-term supply of land provides a range of site sizes and locations to accommodate the market needs of a variety of industrial and other employment uses.

SITE CHARACTERISTICS – The attributes of a site necessary for a particular industrial or other employment use to operate. Site characteristics include, but are not limited to, a minimum acreage or site configuration including shape and topography, visibility, specific types or levels of public facilities, services o energy infrastructure, or proximity to a particular transportation or freight facility such as rail, marine ports and airports, multimodal freight or transshipment facilities, and major transportation routes.

SUITABLE – Serviceable land designated for industrial or other employment use that provides, or can be expected to provide the appropriate site characteristics for the proposed use.

TOTAL LAND SUPPLY – The supply of land estimated to be adequate to accommodate industrial and other employment uses for a 20-year planning period. Total land supply includes the short-term supply of land as well as the remaining supply of lands considered suitable and serviceable for the industrial or other employment uses identified in a comprehensive plan. Total land supply includes both vacant and developed land.

TERMS AND DEFINITIONS

VACANT LAND – A lot or parcel:

- a. Equal to or larger than one half-acre not currently containing permanent buildings or improvements; or
- b. Equal to or larger than five acres where less than one half-acre is occupied by permanent buildings or improvements



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Executive Summary

Resourceful Clatsop County - Economic Opportunities Analysis 2025

Oregon's land use planning system requires cities and counties to update their comprehensive plans periodically and to provide for adequate 20-year growth capacity, based upon an Economic Opportunity Analysis (EOA). Developed at a time when multiple outside events are threatening the County's economic stability and status quo, the Clatsop County EOA provides a comprehensive assessment of the historical, current, and future economic landscape of Clatsop County. This initiative is an extension of the 2023 Clatsop County Comprehensive Plan Goal 9 (Economic Development) update. The EOA acknowledges the county's traditional resource-based economy, which includes robust forestry, fisheries, and recreational tourism sectors. The goal of the analysis is to leverage these existing sectors while also identifying growing and emerging industries to ensure sustainable opportunities for future generations.

The EOA evaluates the current economic conditions, highlighting both the opportunities and challenges local businesses encounter. Notable positive aspects include:

- A resource-abundant region characterized by timber, fisheries, and recreational tourism
- A scenic natural environment
- Steady job growth over the past four decades

Conversely, the analysis identifies several foundational challenges:

- Cyclical nature of major industries
- Shortage of affordable housing for local employees
- Insufficient number of available childcare spaces
- Evolving regulatory restrictions
- Infrastructure limitations

Furthermore, pursuant to OAR 660-009-0015, the EOA examines the availability of vacant and redevelopable employment lands within unincorporated Clatsop County. This evaluation reveals that the employment land base is constrained by historic zoning patterns, environmental factors (such as slopes, wetlands, and flood plains), statewide planning goals and rules, and inadequate infrastructure (including sewer, water, and transportation).

Key Findings:

- Clatsop County has demonstrated consistent population growth over the past four decades; however, projections from Portland State University suggest that this growth may decelerate due to an aging population and declining birth rates over the next 50 years.

EXECUTIVE SUMMARY

- As of February 2025, the predominant employment sectors in Clatsop County are Leisure and Hospitality (4,490 jobs), followed by Trade, Transportation, and Utilities, which includes Retail Trade (3,500) jobs.
- Monitoring of traditional resource-based employment in forestry and fisheries is complicated by statewide reporting regulations, which do not collect data on self-employed persons.
- The food and paper manufacturing sectors have experienced modest employment growth, with an increase of 170 jobs recorded from February 2024 to February 2025.
- Identified growth sectors over the next 20 years include:
 - Blue Marine Economy Sector
 - Healthcare and Wellness Sector
 - Construction and Resources Sector
 - Food Processing Sector
- Employers and respondents to the questionnaire have highlighted housing costs and availability as the foremost challenges to future economic growth in the region.

Recommendations

The identified growth sectors are significant to the current economy, based on state and regional employment projections, anticipated state investment strategies, and strong public support. *Resourceful Clatsop County: Economic Opportunities Analysis 2025* outlines three primary goal areas:

- Economic Activity
- Housing
- Healthy, Safe and Resilient Community

These areas represent the County's vision for the desired outcomes by the conclusion of the 20-year planning period. This document also features an Implementation Strategies matrix that delineates specific work tasks, roles for the County and identified partners, and corresponding timelines for action. This document has been drafted with the intent that it should be continually monitored and updated at least every five years. Annual review of the Implementation Strategies will allow elected and appointed officials and public/private staff to establish yearly goals, evaluate progress, and adapt actions in response to changing external forces. By creating this momentum, Clatsop County can take control of its economic future and establish a comprehensive and prosperous future for all.

Section 1: Introduction



*Astoria Marine Construction Company
Source: University of Oregon*

SECTION 1: INTRODUCTION

THE COUNTY SETTING

Clatsop County is located at the northwest corner of the State of Oregon. The first county government was organized on June 22, 1844, and Astoria has served as county seat for most of that time.

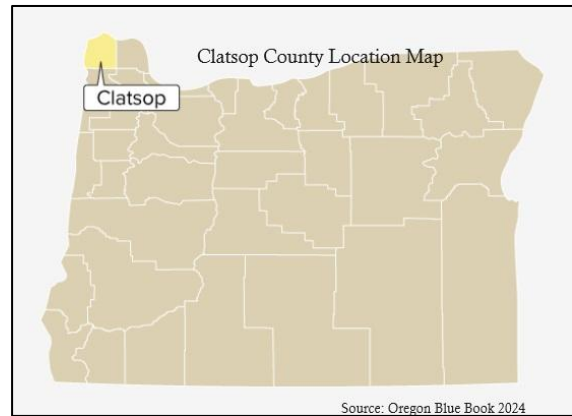
The county has a diverse physical geography that includes the Coastal Mountain Range, the Columbia River, 35.4 miles of Pacific Ocean coastline, and smaller rivers and creeks running from the mountains through the dunes and beach areas along the coast or to the Columbia River. The Coastal Mountain Range provides dramatic backdrops and beautiful vistas and is home to tree species that are the basis for the historic timber industry in the area.

The largest and most significant waterway in the region is the Columbia River. It serves as the northern border of the county and the State of Oregon, provides access to inland resources and population centers, and transports \$23 billion of regional products annually to national and international markets. It traditionally has been the “working waterfront” of the county. The deep-water ports, as well as access to natural resources such as timber and fisheries, make the Columbia River an important economic driver for the region. The U.S. Army Corps of Engineers has reported that the Columbia River supports approximately 100,000 jobs that are either directly or indirectly related to maritime commerce. The cities of Warrenton and Astoria capitalize on this location for industrial development along with the Wauna Mill site near Westport.

Clatsop County has other unique natural features including coastal beaches, dunes, and estuaries. The beaches and dunes area of the county runs generally parallel with the Pacific Ocean from Warrenton to the south county border. These areas are dotted with sandy slopes and plains, and numerous wetland areas. Estuaries associated with the Necanicum River, Ecola Creek and the Columbia River are significant and unique habitat areas for diverse wildlife. The cities of Gearhart, Seaside, and Cannon Beach have developed as coastal recreation communities in this area.

The central and eastern areas of Clatsop County are home to large stands of public-owned and private forestry lands. Historically, many local jobs began in the forests and ended at the mill sites in the area. While the number of mill sites has decreased, forestry operations remain a vital component of the local economy. Although not specifically identified as employment lands (industrial or commercial zoning classifications) by the State of Oregon, these significant tracts of timber are considered by residents and businesses as employment lands for the region.

Figure 1.1: Clatsop County Location Map



SECTION 1: INTRODUCTION

Economic Opportunities Analysis Purpose

The State of Oregon authorizes the Economic Opportunities Analysis (EOA) as a supporting effort for Goal 9 Economic Development planning. The EOA is a technical document that compares projected demand for land for industrial and other employment uses to the existing supply of such land. (DLCD Economic Development Planning Team, 2008). The Clatsop County EOA process is a logical extension of the Comprehensive Plan Update, Goal 9, and is designed to analyze land needs for future economic development and job growth opportunities. However, the process showed early on that the shifting economies and diversification of the jobs base were not going to be managed through a land exercise alone and that an expanded approach would be required.

In addition to the typical land analysis and goal/policy setting, this plan brings the County's economic planning to a different level. This plan reviews past planning efforts and asks the community what has been done to move the Clatsop County economy forward. It reaffirms the goals for a diverse forward-thinking economy that concentrates on the assets of the community.

This document addresses several pressing issues facing Clatsop County in 2025. It is a snapshot of where Clatsop County has been, where Clatsop County is today, and where Clatsop County wants to be in the future. There are certain facts that are reiterated from previous economic development planning efforts. Clatsop County is a resource rich county that includes timber, marine, and recreational assets. Outside forces again threaten to alter the trajectory of the local economy – including the Oregon Department of Forestry's Western Oregon State Forests Habitat Conservation Plan (HCP), FEMA rule changes related to floodplain management and development (FEMA BiOp), and the continued impacts on infrastructure and services from increased tourism. Those forces, coupled with the ongoing triple crises of homelessness, a lack of affordable housing, and a shortage of child care facilities, have created a "perfect storm" of events that makes this EOA more needed and relevant than ever. These complex issues are inextricably linked and will require coordination between the County, cities and other public and private partners to develop lasting and sustainable solutions.

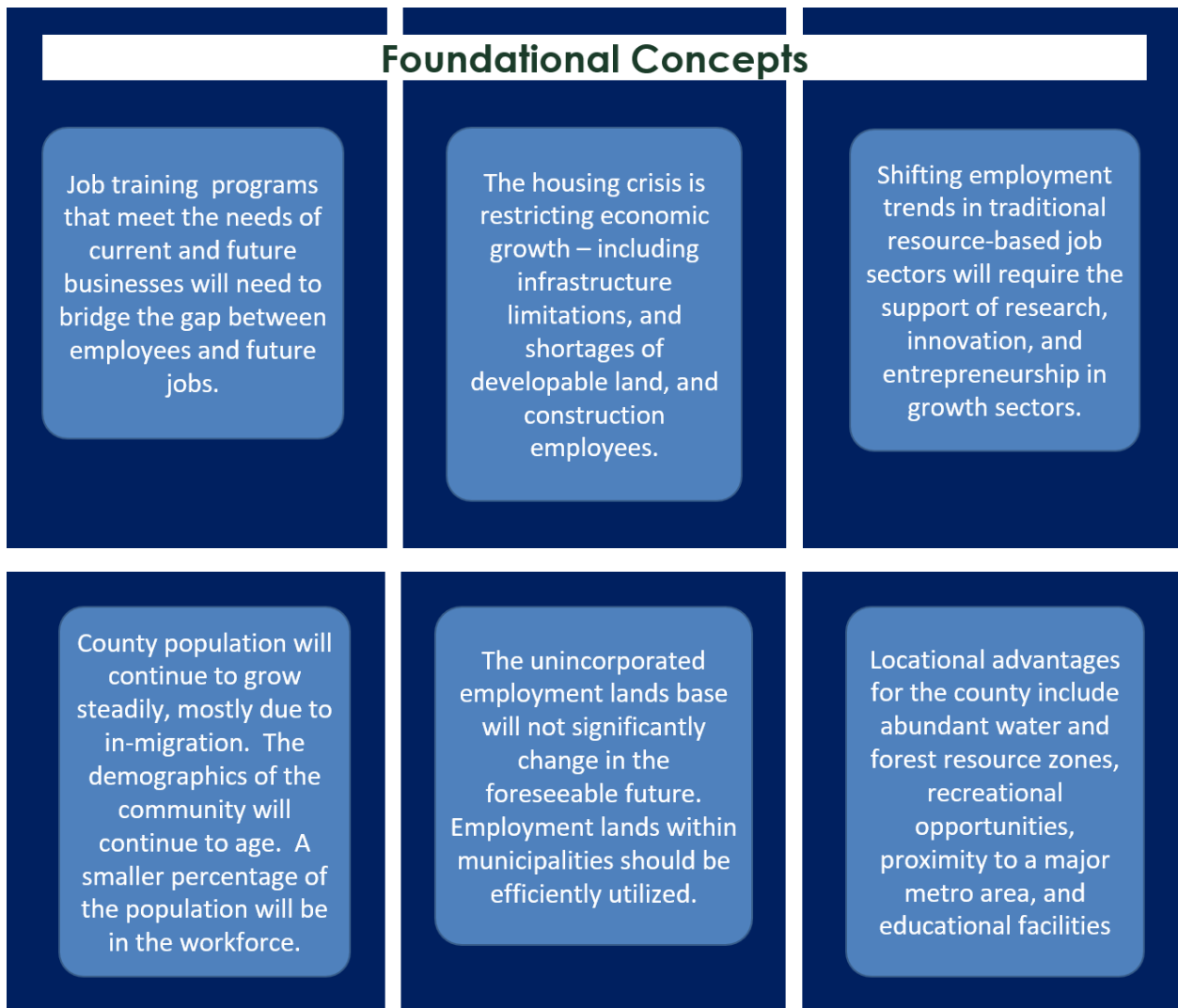
Plan Format

The plan is researched and developed around these six basic foundational concepts, shown below in Figure 1.2. The County's economy has historically been dependent on the harvest and use of local resources and the recreational tourism associated with the natural resources of the region. This context will not change significantly over the 20-year planning period covered by this analysis. How the community approaches these resources and on which of the resources it leans will change as a response to outside influences on the county and the changing state, national, and international economies. Clatsop County will always be at the northwest corner of Oregon. It will always have access to the biggest ocean in the world, the largest river in the Pacific Northwest, and Clatsop County and its residents will always strive to wisely manage its

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resources for the greatest local and regional public benefit and for future generations.

Figure 1.2: Foundational Concepts



Public Involvement Process

Clatsop County started to involve the public in discussions about future economic development during the 2019-2023 Comprehensive Plan update process. Citizen advisory committees and stakeholders participated throughout the plan update and review process. The Port of Astoria, the Clatsop County Fairgrounds, chambers of commerce, Clatsop Community College and others provided input on revisions to Goal 9 (Economic Development), updating an element that had not been amended in over 40 years. The EOA process is the next a logical extension of the Goal 9 planning process as it seeks to examine future employment land needs and establish an economic blueprint for the next 20 years.

In 2023 a Technical Advisory Committee (TAC) was convened and began reviewing historical

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data, current trends, and future projections related to population, demographics and employment in Clatsop County and the State of Oregon. The TAC included representatives from major industries, community groups, state and regional organizations and other interested parties. The TAC was charged with representing the varied interests and perspectives from within Clatsop County and the State of Oregon. The five TAC meetings were publicized and conducted in a virtual format. All documents presented to the TAC were added to the Clatsop County EOA webpage.

During the summer of 2024, the County developed and promoted an economic development questionnaire to foster additional input to the goals and action steps for the document. A summary of results from the 184 responses to the questionnaire is in Appendix A. The results helped to focus the foundational building concepts above, as well as the goal statements, and action steps.

Following completion of the draft goal statements and action steps, Clatsop County hosted two public open houses and invited members of the public to provide feedback and comments. Public hearings were held by both the Clatsop County Planning Commission and the Clatsop County Board of Commissioners before the document was scheduled for adoption in June 2025.

Historic Economic Development Planning

As guided by state planning regulations, Clatsop County first examined the strength and weaknesses of its economic base in the late 1970s and early 1980s. The first Goal 9 Element was adopted in July of 1980. The background report strongly declared that the primary goal was to “diversify and improve the economy of the state and Clatsop County”. The report identifies the County’s big three economic engines as: forestry, fisheries, and tourism. Even though the “Big Three” industries remain, the data from that plan reflects a very different economic reality from today. The goal report states that the lowest unemployment rate was at 5.1% in 1965 and the highest at 10.8% in 1974. These numbers were challenging then but would be seen as very challenging compared to modern unemployment rates, which are currently around 4%. The concerns of the time were highlighted by the following statements from that plan:

Currently, a substantial portion of all unemployed persons in Clatsop County do not possess the basic skills necessary to maintain viable full-time employment. In addition, few opportunities are available to upgrade existing skills or learn new ones...numerous geographic conditions act to isolate the area from major markets due to certain transportation disadvantages. Of particular concern is Highway 30 and the railroad to handle increased usage. Highway 30 needs improvements in the vicinity of Astoria to offer a swift and essential corridor to Portland.

There is a present lack of appropriately sized parcels zoned for industrial development in the County primarily outside of the urbanized areas adjacent to

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either the Columbia River or Coastal plain areas.

The 1980 Comprehensive Plan Goal 9 report identified areas of concern, including: “the dependence on harvest and exploitation of local natural resources; fragmented local economic planning; insufficient industrial land in rural areas; economic conflicts over resource use; development pressure on agricultural, forest, and marine uses; seasonality of major occupational opportunities; increased mechanization; low-income in non-manufacturing and non-resource based occupations; and a disproportionately high number of retired residents.”

The world economy has changed dramatically since the 1980s, but many of the issues and concerns from that time have not.

In 2004, the County conducted another economic planning program. The three-step process included a strengths, weaknesses, opportunities, and threats (SWOT) review, a community survey of businesses and residents, and focus group interviews. It resulted in the County establishing the following unified definition of ***Economic Development***:

Public and private activities that encourage investments that provide the community with:

- Quality educational opportunities and access to higher education systems
- Living-wage jobs
- Affordable housing
- Recreational opportunities
- Multiple health care choices
- Community safety, and
- Environmental quality

The plan identified shortcomings in tax revenues to fund infrastructure improvements, lack of air and rail service, and the distance to the interstate highway system as major hurdles. Other issues of concern included:

- Inadequate job training
- Lack of economic development staff to assist with business growth
- Costs of health care and housing
- Inadequate transportation systems

Recommendations for coordination of county-wide economic development efforts, which had been seen as fragmented, were also developed. The report’s recommendations included:

- Streamlining the development process
- Coordinating county and city economic development efforts
- Maintaining an updated economic database
- Creating a business rapid-response team
- Upgrading the tourism industry to improve job quality and pay levels

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A decade later in 2014, the community embarked on a visioning process that focused on the health of the community. The process, called- **“Clatsop Vision 2030 Together”**, created vision statements and identified potential strategies for six different focus areas based upon input obtained during community interviews, regional workshops, online questionnaires and extensive public outreach. The final product included 16 potential strategies to create a diverse and more stable economy that were related to the economic health of the community. The vision statement for the Economy and Jobs Section states:

In 2030, Clatsop County has a diverse, stable economy that produces good living-wage jobs, allowing people of all ages and incomes to live here and thrive. Our economy balances the county’s natural resource base with its scenic beauty– and growth with the long-term sustainability of our environment. We recognize the importance of our traditional industries, such as forestry, fisheries and tourism, while transitioning to the emerging economy of the 21st century. While maintaining our status as a maritime and forest products center, we also promote “value added” industry and light manufacturing in appropriate locations. Newer, innovative enterprises are drawn here for both our natural environment and skilled workforce, and our prosperity builds on our rich culture, historical traditions, and vibrant arts and culture scene.

In 2019, Clatsop County updated its Comprehensive Plan including Goal 9: Economic Development. The stated goal remains the same as the original 1980 plan:

Goal: To diversify and improve the economy of the state and Clatsop County.

The economic position of Clatsop County has evolved over the past 40 plus years, as have some of the policies. Goal 9 still identifies the “Big Three” industries as forestry, marine resources, and travel. The plan identifies other threats and opportunities for the economic health of the region:

- Housing shortages and costs (Threat)
- Impacts of the State Habitat Conservation Plan (Threat)
- Changing flood plain regulations (Threat)
- Expanding telecommunication and technology infrastructure (Opportunity)
- Growing agri-tourism opportunities (Opportunity)
- Expanding fairgrounds usage (Opportunity)
- Expanding the capacity of Clatsop Community College (Opportunity)
- Arts and culture community(Opportunity)

Many of the current threats result from actions originating from outside of the County, including state and federal regulations that impact natural resource-based employment and limit development opportunities. These new challenges, combined with ongoing needs identified in previous planning exercises and areas of opportunity, make the need to fully implement the recommendations of this analysis more imperative than ever before.

Section 2: Current Economic Indicators



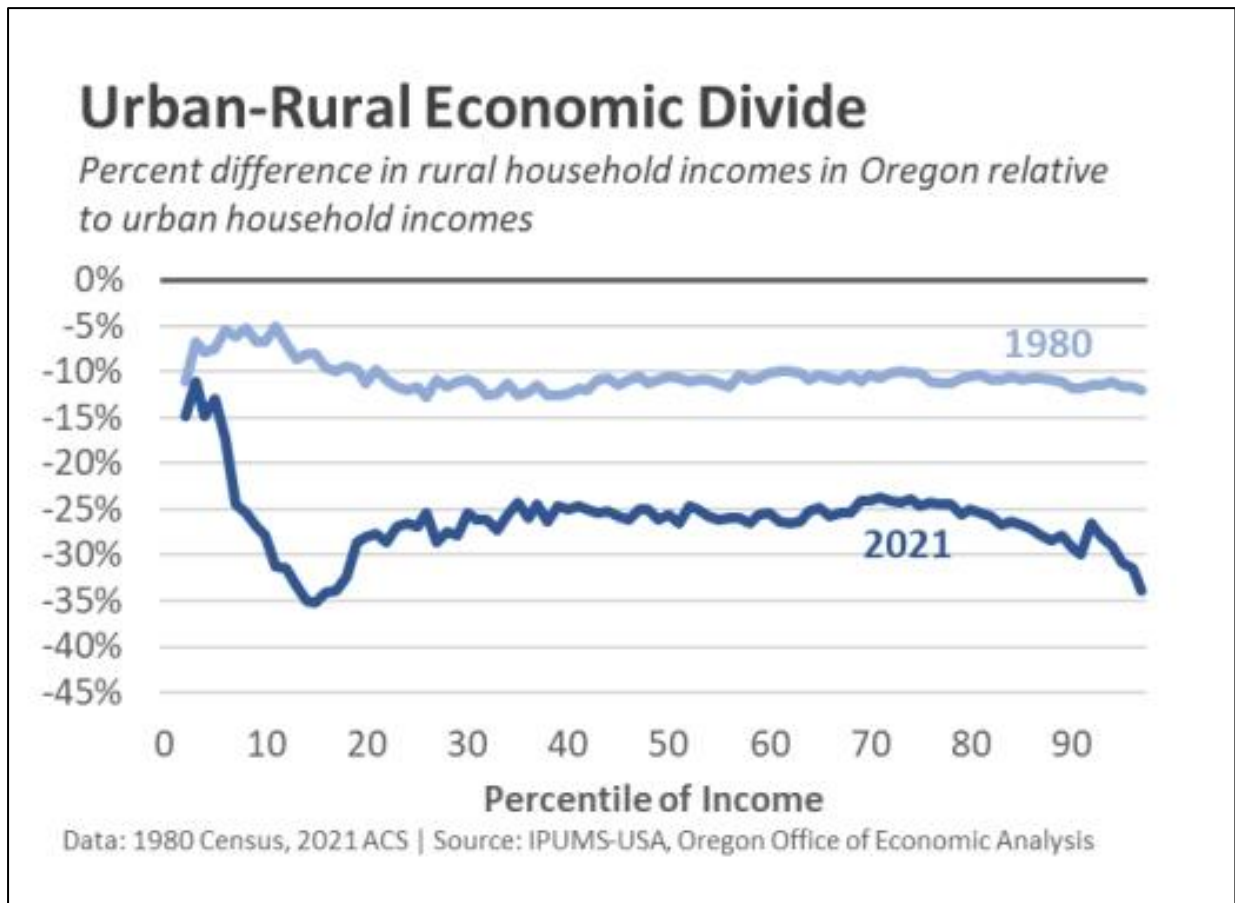
*Jewell circa 1941
Source: Clatsop County Historical Society*

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Statewide Context

Clatsop County is one of 36 counties in Oregon. Its location has historically made it a resource, river, and recreation county. It is more rural than urban, although its proximity to the Portland metro area gives it access to some of the cultural and employment opportunities of an urban area. The rural economies of Oregon have always trailed the urban economies in terms of wages and overall employment. Even with technological advances that allow for remote work options, the rural economy still lags in economic production, wages and opportunities.

Figure 2.1. Urban-Rural Economic Divide (2021)

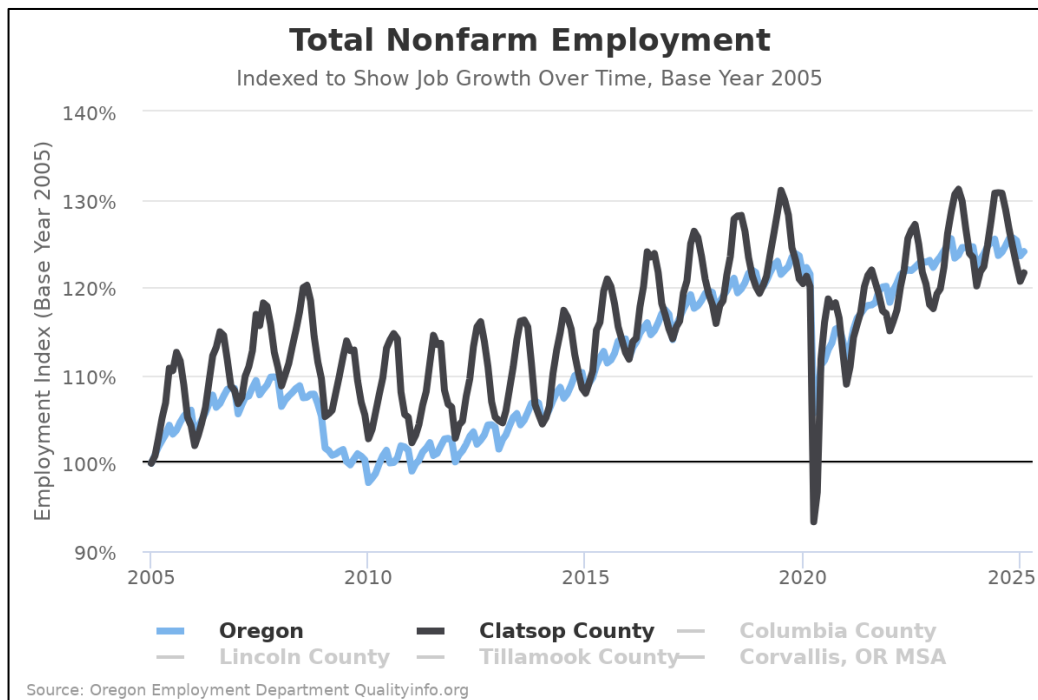


Source: Oregon Office of Economic Analysis

The Oregon economy is more volatile than most states, so during expansions, the economy grows more quickly and falls further in recessions. (Oregon Office of Economic Analysis). In a state whose economy fluctuates more than most, the Clatsop County economy fluctuates more than most counties in Oregon. If non-farm employment is isolated, overall employment is trending upwards statewide. The county, however, has significant seasonal peaks and valleys that are shown on Figure 2.2. The light blue line represents job volatility for Oregon and the black line represents employment in Clatsop County. Other coastal counties have similar annual employment volatility.

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Figure 2.2. State and County Non-farm Employment History (January 2025)



Source: Oregon Employment Department

Clatsop County Context

The location of Clatsop County continues to define the economic engine for the area. Timber harvesting, fisheries and food processing, and travel remain the “Big Three” employment sectors. Although the county economy is statistically healthier than it has been in terms of overall employment rates and wages, current and anticipated external regulatory changes related to timber harvests, floodplain development, and wastewater treatment and discharge are a near-term threat to the healthy local economy. Furthermore, while the tourism sector continues to generate an increasing number of jobs, many of those positions do not provide a living wage salary. Additionally, state-mandated requirements for the use of transient room tax limit the County’s ability to utilize those funds to address impacts to infrastructure and law enforcement generated by increasing levels of visitors. Finally, the ongoing housing crisis throughout the state is likely the most pressing issue limiting economic development within the county.

The following section reviews current economic indicators for the health of the Clatsop County economy and examines future trends and growth sectors.

Current Economic Indicators

Gross Domestic Product

In general terms, the Clatsop County economy is expanding, although not as fast as the State of Oregon as a whole. The county Gross Domestic Product (GDP) has grown from \$1.843 billion in

SECTION 2: CURRENT ECONOMIC INDICATORS

2017 to \$1.956 billion in 2022. This represents an increase of 6.2%, while State GDP rose 14.4% during the same time frame. Similarly situated rural counties in Oregon grew at comparable rates. (Source: Federal Reserve Bank of St. Louis (www.fred.stlouisfed.org))

Figure 2.3 Clatsop County and Oregon Gross Domestic Product (GDP) Change

Gross Domestic Product Change 2017 - 2022			
	2017	2022	% Change
Clatsop County	\$ 1,843,200.00	\$ 1,956,800.00	6.2%
Oregon	\$ 222,601,600.00	\$ 254,710,000.00	14.4%
United States	\$ 19,480,000,000.00	\$ 25,440,000,000.00	30.6%

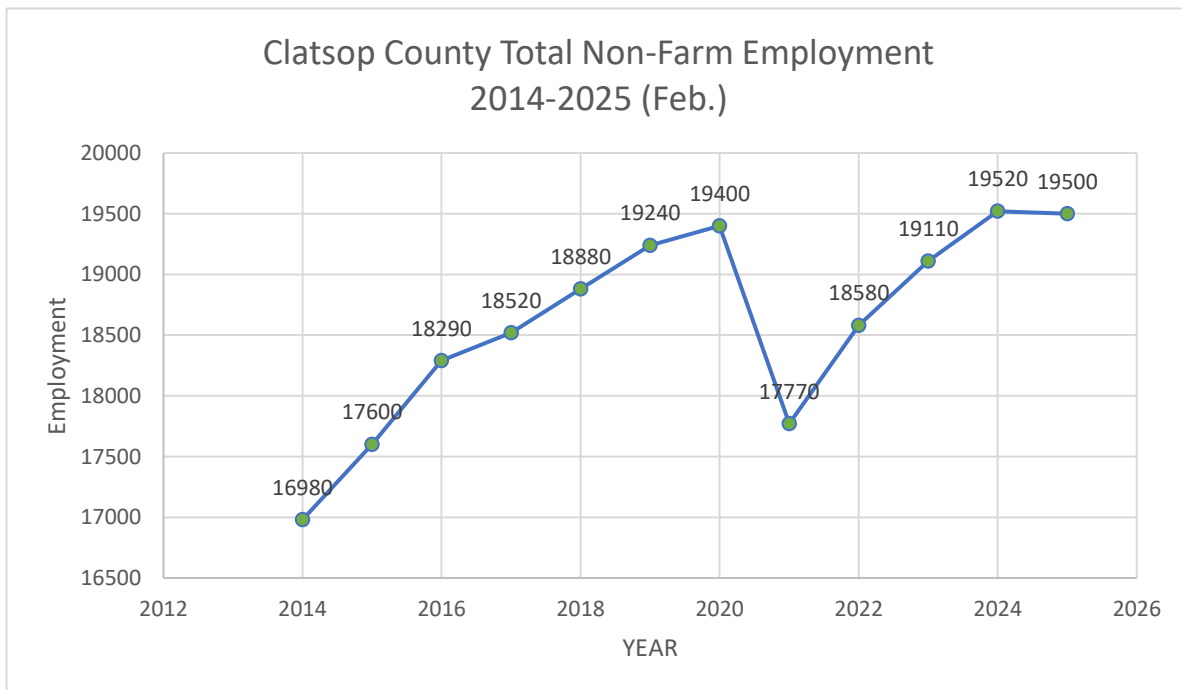
Source: Oregon Employment Department and World Bank

GDP is a general indicator of the overall health of an economy. The slower GDP growth statistics are not unique to Clatsop County. As discussed above, the rural-urban divergence also shows up in income analysis. The Oregon Office of Economic Analysis compared rural and urban income levels from 1980 to 2021 (Figure 2.1). In 1980, incomes for rural Oregonians were about 10% lower than urban area incomes. By 2021, the gap increased to 25%.

Job Growth and Employment

Job growth continues in Clatsop County. After the significant job losses at the start of the COVID pandemic in 2020, the number of people employed in Clatsop County has surpassed the pre-pandemic levels in both real and seasonally adjusted levels. Figure 2.4 uses information

Figure 2.4. February Data Point Seasonally Adjusted Non-Farm Employment



Source: State of Oregon Employment Department

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from the Oregon Employment Department that clearly shows the initial pandemic year (2020) drop in employment. The total employment number fully rebounded by 2023 and 2024. The number remained nearly unchanged between February 2024 and February 2025.

The unemployment rate for Clatsop County has remained low since the pandemic recovery began in 2021. The February 2025 unemployment rate for Clatsop County was 4.3% - lower than the State of Oregon and Columbia County, and the same as Tillamook County.

Figure 2.5. Unemployment Regional Comparison, February 2025

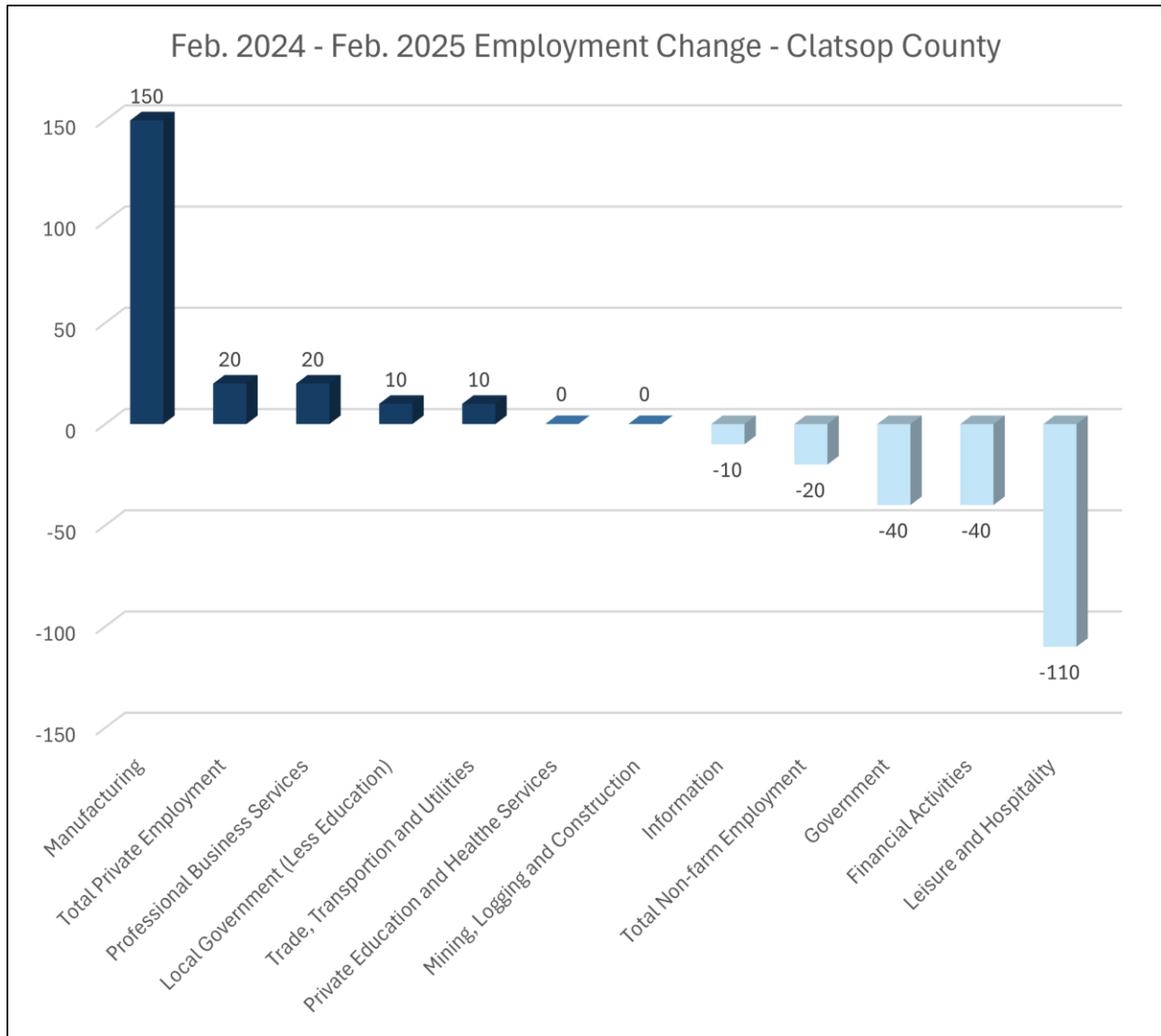


Source: State of Oregon Employment Department

The year-over-year employment figures for February 2024 to February 2025 (Figure 2.6) show a slight drop in the number of seasonally-adjusted total non-farm employment (-20 jobs). Most notable was the increase in manufacturing jobs over the period. Job losses were noted in the Leisure and Hospitality, Financial Activities, Government and Information sectors.

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Figure 2.6. February 2024 – February 2025 Employment Change – Clatsop County



Source: State of Oregon Employment Department

Another notable trend is the percentage of residents in the workforce. State employment figures showed that in 2010, 55% of Clatsop County’s population was in the work force. By 2024, that number had decreased to 49%. This trend mirrors other recreational counties or regions where the population is aging. This issue is addressed in greater detail in Section 3 of this report. Employment indicators are just one part of the true health of the Clatsop economy. Other economic wellness factors include poverty rates, housing availability and affordability, houselessness rates, and education attainment rates.

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Income Growth, Living Wages and Poverty Rates

Personal income levels have increased in Clatsop County at comparable rates to the State of Oregon but remain approximately 14% lower than the state median household incomes.

Figure 2.7. Median Household Income Growth (2000-2022)

	2000	2010	2022	22 Years % Change	12 Years % Change	22 Years \$ Change	12 Years \$ Change
Clatsop County	\$36,945	\$44,234	\$68,025	84%	54%	\$31,080	\$23,791
Columbia County	\$47,133	\$50,707	\$83,265	77%	64%	\$36,132	\$32,558
Tillamook County	\$34,663	\$40,797	\$63,098	82%	55%	\$28,435	\$22,301
Washington County	\$55,139	\$60,555	\$85,385	55%	41%	\$30,246	\$24,830
Multnomah County	\$43,153	\$48,018	\$82,539	91%	72%	\$39,386	\$34,521
Clackamas County	\$52,670	\$57,960	\$97,419	85%	68%	\$44,749	\$39,459
State of Oregon	\$42,500	\$50,600	\$78,860	86%	56%	\$36,360	\$28,260

Source: Federal Reserve Bank of St. Louis

There is much discussion about the need to create more living wage jobs. However, there is less understanding of what an actual living wage job is. The Massachusetts Institute of Technology has compiled a living wage calculator for every county in the United States (<https://livingwage.mit.edu/>). The researchers have defined “living wage” as the hourly rate a full-time worker needs to earn to meet basic cost of living expenses in their geographic area. These basic needs include childcare, food, health care, housing, internet/mobile phone, transportation, civic engagement, utilities and income and payroll taxes. Additional details can be found on the MIT living wage website.

Figure 2.8 shows the estimated 2025 living wage estimates for Clatsop County. For a family of four with two wage earners, each person would need to earn \$27.64 per hour for typical full-time positions (2,080 hours per year). A single parent with one child would need to make \$39.86 per hour to cover basic living expenses.

Figure 2.8. Living Wages – Clatsop County 2025

	One Adult Working			
	0 Children	1 Child	2 Children	3 Children
Living Wage	\$22.83	\$39.86	\$49.46	\$60.58
Minimum Wage	\$14.70	\$14.70	\$14.70	\$14.70
	Two Adults - One Working			
	0 Children	1 Child	2 Children	3 Children
Living Wage	\$31.74	\$37.95	\$42.30	\$49.19
Minimum Wage	\$14.70	\$14.70	\$14.70	\$14.70
	Two Adults - Both Working			
	0 Children	1 Child	2 Children	3 Children
Living Wage	\$15.87	\$22.57	\$27.64	\$32.17
Minimum Wage	\$14.70	\$14.70	\$14.70	\$14.70

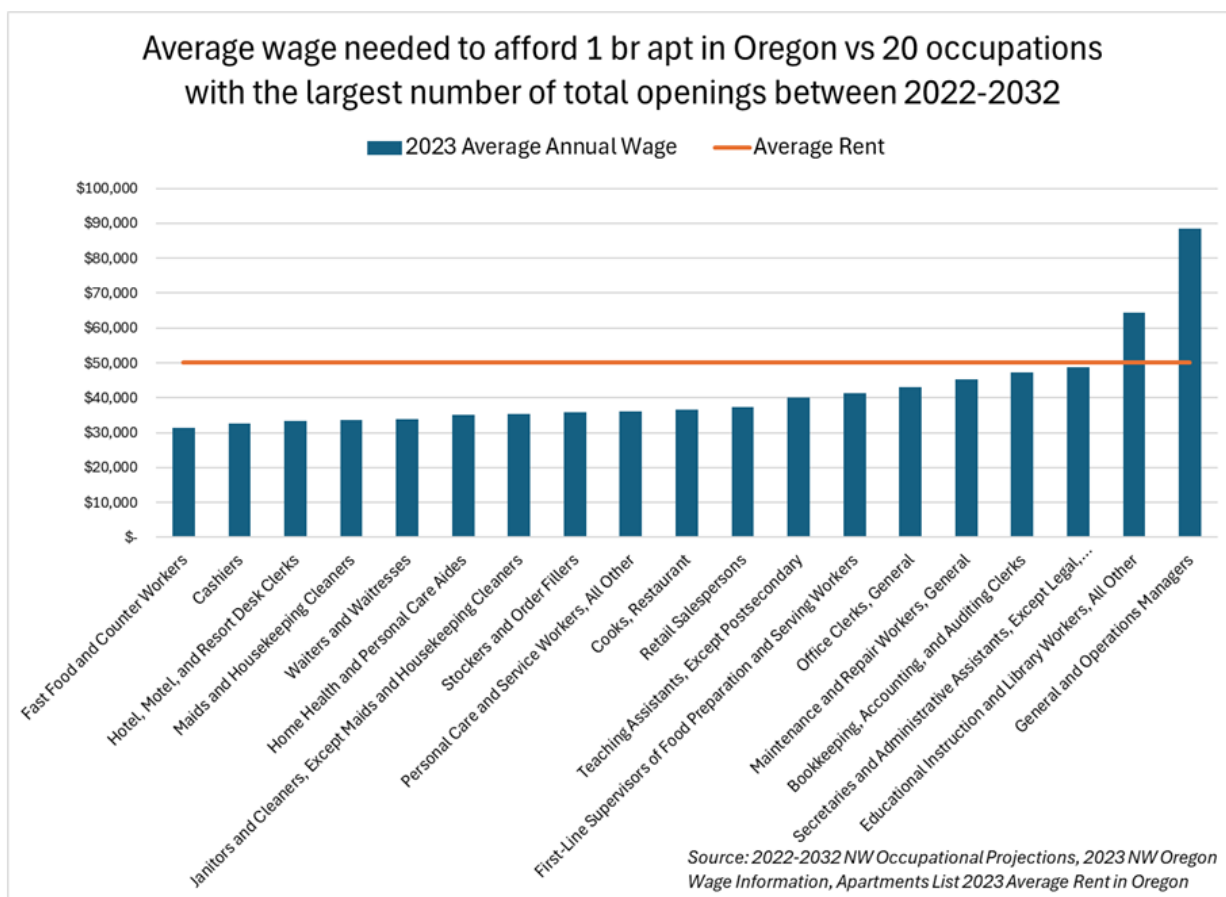
Source: Massachusetts Institute of Technology – Living Wage Calculator

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In 2024, the Oregon Housing and Community Services Department released the State of the State’s Housing report which documents rising home ownership costs and rental prices throughout the state of Oregon. The report found that more than half of all renters in Oregon and a third of homeowners experience a housing cost burden, meaning that they spend more than 30% of their income on housing costs. The report also examined future job and income growth for 20 sectors between 2022 and 2032. The report concluded that employees in 13 of the 20 fastest growing occupations would not, on average, make enough money to afford a 1-bedroom apartment.

Economists from the Oregon Employment Department reviewed the same data for the Northwest Oregon region (Columbia, Clatsop, Tillamook, Lincoln and Benton counties). The analysis shows that of the 20 occupations with the most openings between 2022 and 2032, the average wage for 18 of the occupations would not allow them to afford the rent for an average 1-bedroom apartment.

Figure 2.9. Occupation Growth and Rental Housing Costs



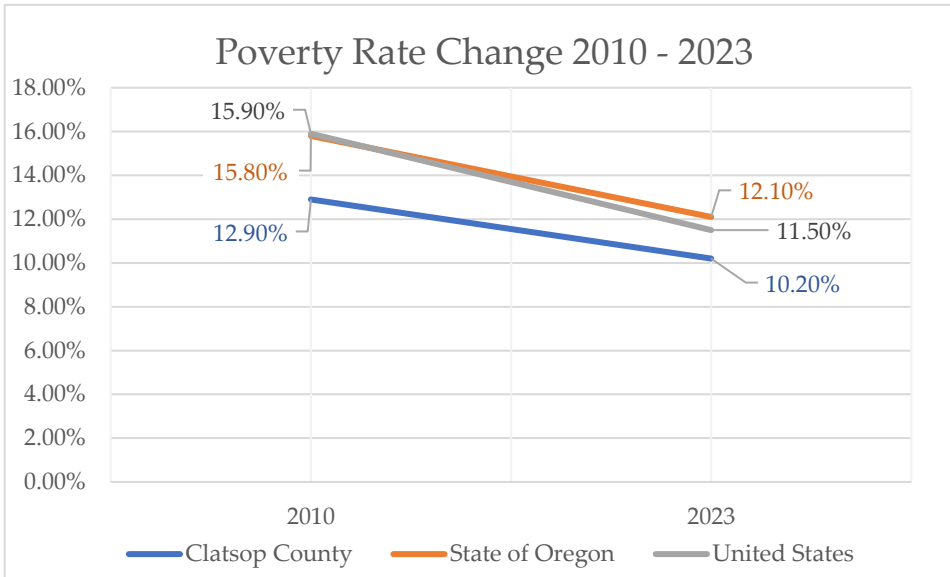
This data highlights the connection between employment growth, wages and housing availability and affordability in the region. Based upon this information it would appear that not only is additional housing at all price points required, but pay levels need to be examined

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and certain occupational sectors should be promoted and supported to increase the opportunities for living wage employment.

Another generalized indicator of the health of the economy is the poverty rate of an area. Overall, poverty rates for the county, state, and nation have dropped over the past 13 years. The Clatsop County poverty rate has dropped to 10.2%. This is lower than both the State of Oregon and national rates.

Figure 2.10. Poverty Rate Change



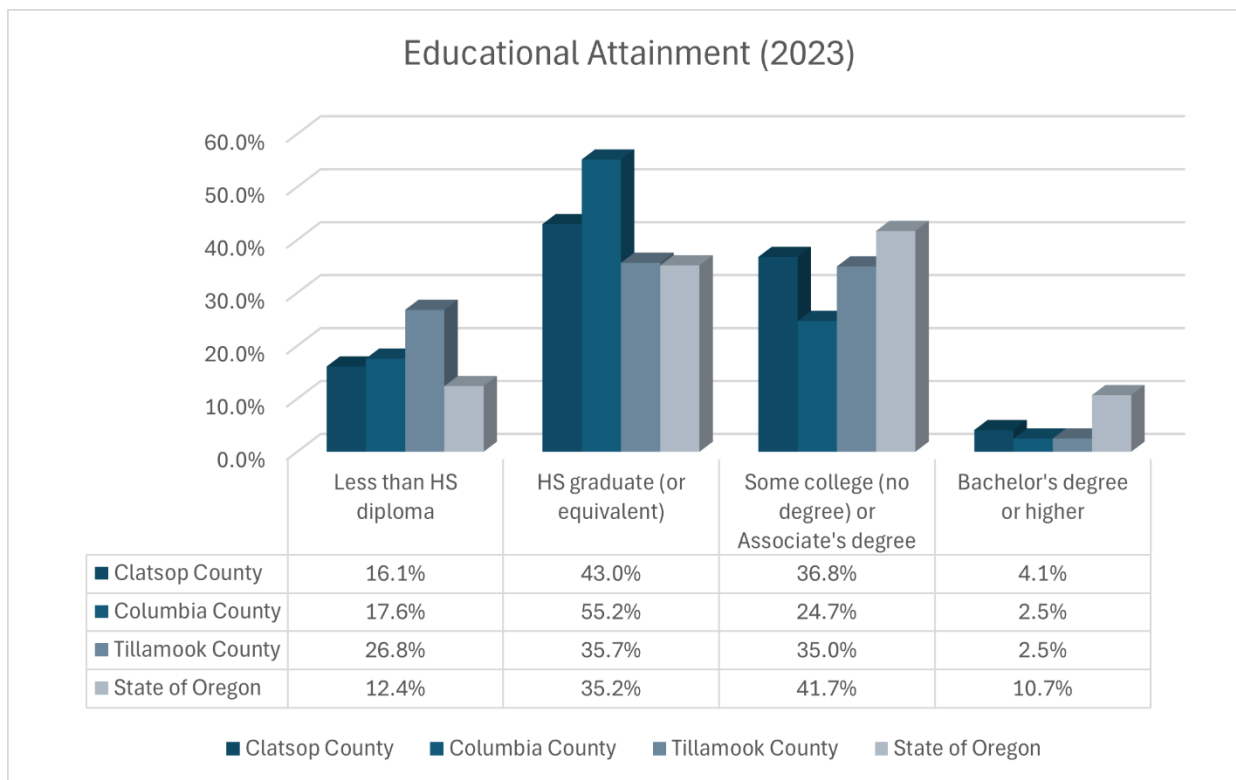
Source: United States Census Reports

Educational Attainment

Educational attainment is another factor to predict the overall economic health and sustainability of a community. Data from the 2020 Census in Figure 2.11 shows that Clatsop County has a higher rate of high school graduation and associate's degree attainment than the state of Oregon. The four-year degree and post-graduate and professional degree education rates, however, are below the state average. High school graduation rates and college graduation rates are both higher than the levels recorded in the 1990 Census (high school degree - 1990: 81.8%; 2020 high school degree - 2020: 92.2%) (4-year degree or higher - 1990: 16.7%, 4-year degree or higher - 2020: 23.7%).

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Figure 2.11. Educational Attainment



Source: 2023 American Community Survey 5-Year Estimates

It is often the case that employment sectors that offer living wages are also the sectors that require education beyond a high school diploma. One of Clatsop County’s strongest opportunities is the fact that it has a community college with two campuses. Community colleges can prepare students for careers requiring an associate’s degree or can reduce costs for traditional four-year college students by allowing them to complete basic core courses while living at home and attending a less expensive educational institution. Community colleges can also have a vital role in retraining workers and establishing curricula to support the needs of local employers. Beginning in May 2023, Clatsop Community College began a period of transition and restructuring. In April 2025, the College proposed eliminating and/or restructuring six positions in FY 2025/26 to address funding challenges. One of the reasons cited for the proposed reductions was declining enrollment. Between academic years 2022/23 and 2023/24, full-time equivalent (FTE) enrollment declined from 1,073 students to 899 students. Those enrollment figures are lower than pre-pandemic levels and are in contrast with other community colleges around the state, which have experienced enrollment increases (Daily Astorian; Oregon Community Colleges Data Mart).

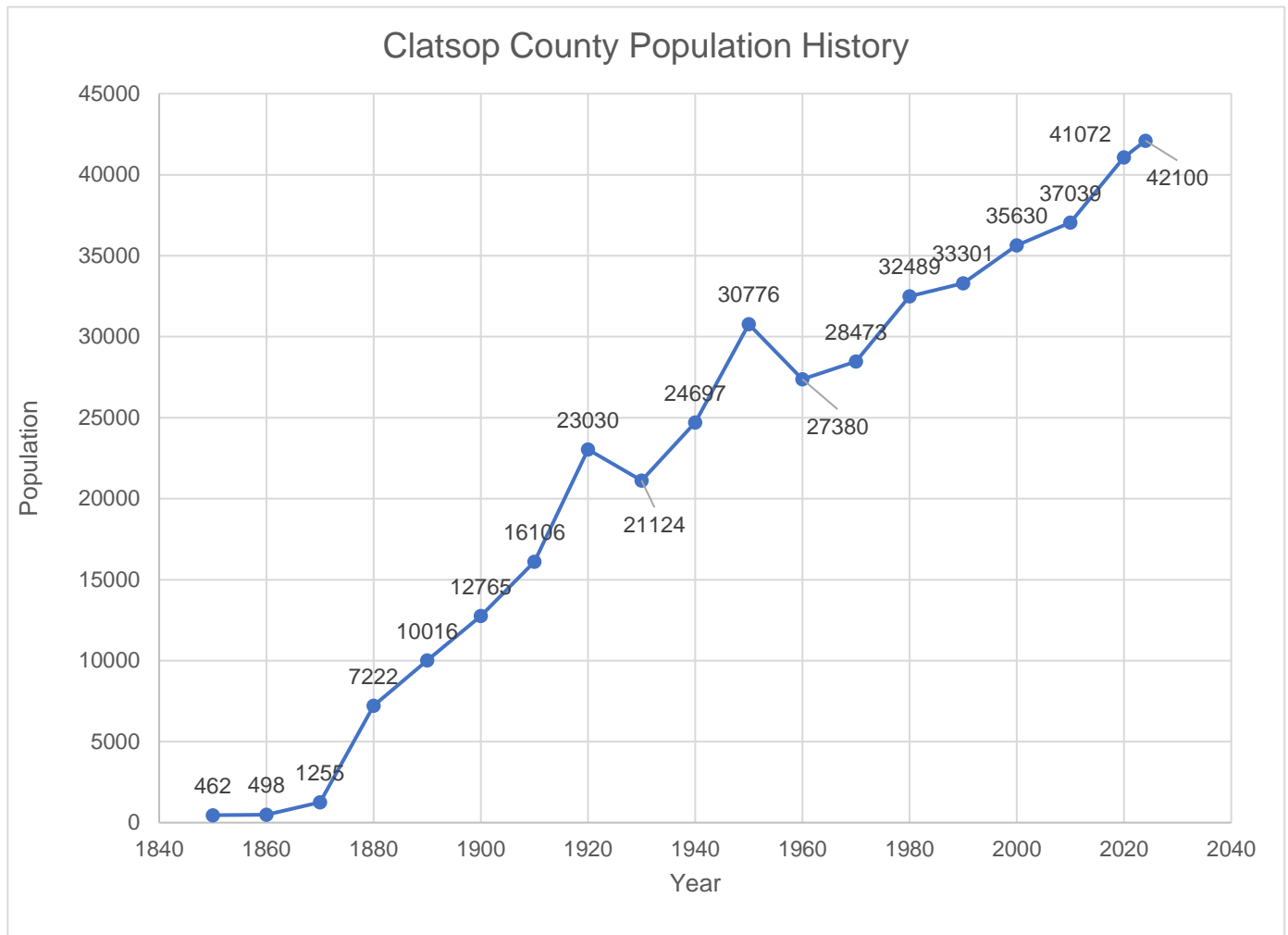
Population Statistics

Since its inception, Clatsop County’s population growth has occurred at a relatively steady pace,

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except for two peaks associated with economic boom times within the county and the nation.

Figure 2.12. Clatsop County Population History



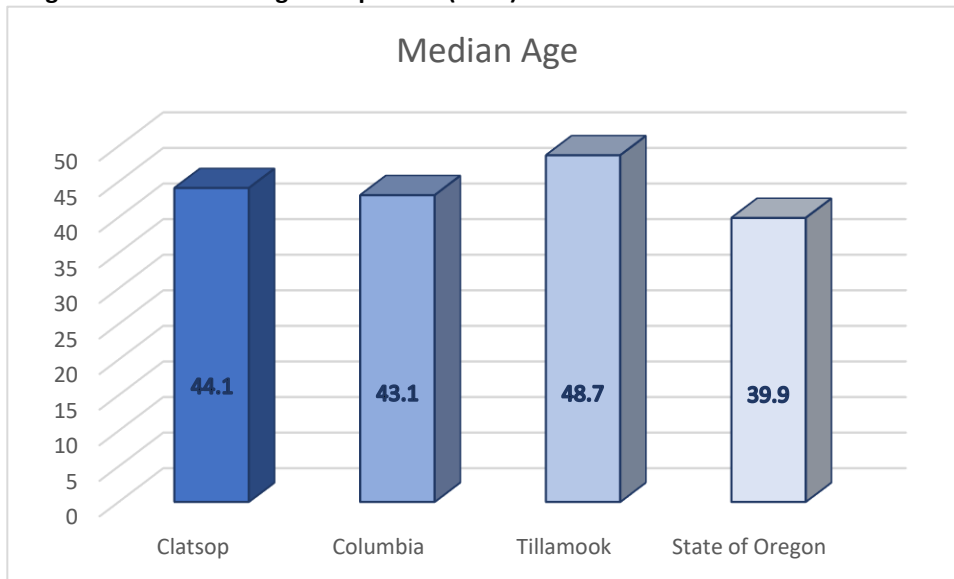
Source: United States Census Reports

Both in 1920 and again in 1950, the county's population rose then fell during the subsequent decade. Both eras align with resource use and industry expansions and subsequent economic declines. Population growth in recent decades can be tied to the net in-migration of retirees to rural recreational counties.

Per the 2020 Decennial Census, Clatsop County has a total population of 41,072. National, regional and local trends indicate that the median age of the population in Clatsop County is increasing. This is consistent with previous planning efforts that noted the higher median ages and number of retired residents in the county. Figure 2.13 and Figure 2.14 show the median age and percentage of population over 65 in Clatsop, Columbia, and Tillamook Counties and the State of Oregon.

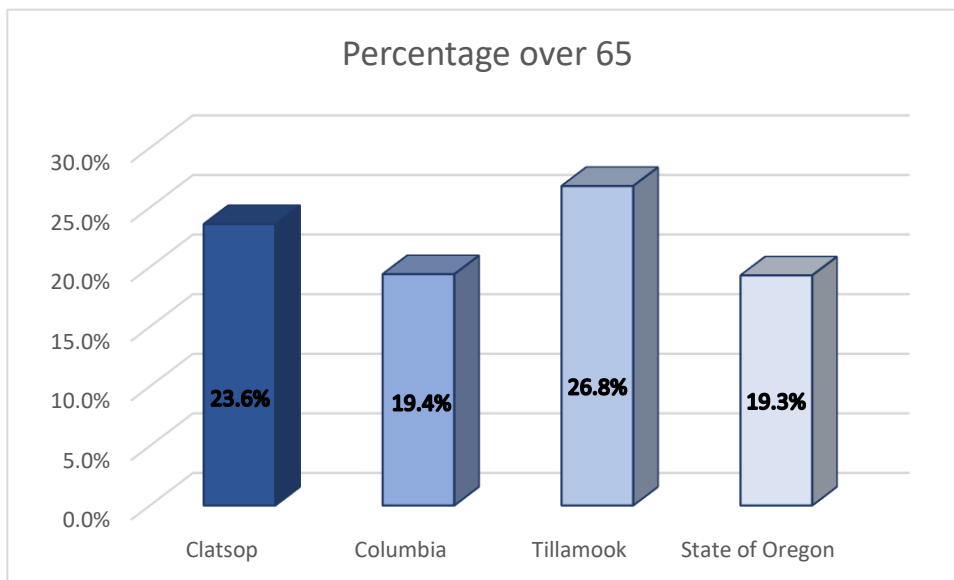
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Figure 2.13. Median Age Comparison (2020)



Source: United States 2020 Census Report

Figure 2.14. Percentage of Population over 65 (2020)



Source: United States Census Reports

The aging of Clatsop County’s residents mirrors trends from across the state and the country. As a recreational county with abundant natural beauty, retirement in-migration will likely impact the future workforce characteristics. This is documented in the Oregon Employment Department report entitled “Oregon’s Labor Force - What Slower Population Growth and Increasing Retirements Mean for the Workforce” (July 2024). The report details how the aging

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of the Baby Boomer generation will impact future labor conditions.

The youngest members of the large Baby Boomer Generation, born between 1946 and 1964, turn 60 years old this year. Workers in the age group have been, and are expected to continue, shifting into retirement and taking their skills and experience with them.

- *In 1990, 10% of job holders in Oregon were at least 55 years old. By 2022, that share grew to 24%.*
- *In 2023, the number of Oregonians not in the labor force due to retirement reached 786,000, an all-time high. Over the past decade, the number of Oregonians not in the labor force due to retirement grew by 160,000 or 26%.*

Between 1993 and 2023 the percentage of workers in what is defined as “prime working age” (25-54 years) dropped as a percentage of the workforce from 74.4% to 67.0% reflecting the higher percentage of retiree aged residents.

Figure 2.15. Oregon Labor Force Change by Age Cohort (1993 – 2023)

	1993		2023	
	Labor Force	Share	Labor Force	Share
16 to 19 years	79,000	5.0%	90,000	4.2%
20 to 24 years	155,000	9.7%	191,000	8.9%
25 to 34 years	372,000	23.3%	479,000	22.4%
35 to 44 years	494,000	31.0%	506,000	23.6%
45 to 54 years	321,000	20.1%	448,000	20.9%
55 to 64 years	134,000	8.4%	275,000	12.9%
65 years and older	40,000	2.5%	151,000	7.1%
Prime Age 25-54	1,187,000	74.4%	1,433,000	67.0%

Source: Oregon Employment Department, Local Area Unemployment Statistics

Rural counties tend to have slightly higher percentages of workers over 55 years of age. In Clatsop County, 27% of workers are 55 years old or greater, slightly higher than the Oregon rate of 24%.

Figure 2.16. Oregon Counties Age Analysis (2023)

Share of Jobs Held by Workers Ages 55+ in Rural Areas					
County	Ages 55+	% Ages 55+	County	Ages 55+	% Ages 55+
OREGON					24%
Grant	641	32%	Klamath	5,872	26%
Curry	1,996	31%	Malheur	3,459	26%
Lake	698	31%	Yamhill	9,835	26%
Wallowa	913	31%	Columbia	2,901	26%
Wheeler	103	30%	Marion	1,720	26%
Lincoln	5,002	30%	Crook	22,704	26%
Jefferson	1,883	30%	Jackson	8,190	26%

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Figure 2.16. Oregon Counties Age Analysis (2023)

Share of Jobs Held by Workers Ages 55+ in Rural Areas					
County	Ages 55+	% Ages 55+	County	Ages 55+	% Ages 55+
Coos	6,348	29%	Umatilla	11,691	25%
Harney	679	29%	Linn	38,294	25%
Tillamook	2,625	28%	Lane	38,294	25%
Sherman	226	28%	Clackamas	44,082	25%
Clatsop	4,720	27%	Polk	5,304	25%
Wasco	2,851	27%	Benton	9,316	25%
Josephine	8,103	27%	Morrow	1,465	24%
Baker	1,418	27%	Union	2,305	23%
Douglas	9,743	27%	Deschutes	20,158	23%
Hood River	3,624	27%	Washington	72,408	22%
Gilliam	211	27%	Multnomah	112,231	22%

Source: Oregon Employment Department and U.S. Census Bureau, Quarterly Workforce Indicators

Some sectors have even higher percentages of workers over the age of 55. Roughly 33% of workers in resource-based sectors are at or above 55 years in age. Other major local sectors such as Health Care and Social Assistance, Retail Trade, Accommodation and Food Services have a generally younger workforce.

Figure 2.17. Aging Workforce by Sector (2023)

Oregon Jobs in 2023	All Workers	Age 55+	% Age 55+
ALL SECTORS	1,937,646	466,892	24%
Agriculture, Forestry, Fishing and Hunting	51,599	17,129	33%
Mining, Quarrying, and Oil and Gas Extraction	1,782	571	32%
Real Estate and Rental and Leasing	31,310	8,982	29%
Transportation and Warehousing	75,268	20,177	27%
Utilities	8,198	2,189	27%
Public Administration	76,045	20,216	27%
Manufacturing	187,188	49,612	27%
Other Services (except Public Administration)	67,927	17,976	26%
Wholesale Trade	79,239	20,715	26%
Educational Services	147,653	38,323	26%
Finance and Insurance	55,456	13,844	25%
Health Care and Social Assistance	300,237	72,783	24%
Administrative and Waste Services	105,222	24,966	24%
Retail Trade	208,358	49,131	24%
Construction	124,024	28,640	23%
Professional, Scientific, and technical Services	113,276	24,722	22%
Arts, Entertainment, and Recreation	33,491	7,042	21%
Management of Companies and Enterprises	53,138	10,926	21%
Information	41,478	7,697	19%
Accommodation and Food Services	176,757	31,251	18%

Sources: Oregon Employment and Quarterly Workforce Indicators, U.S. Census Bureau

SECTION 2: CURRENT ECONOMIC INDICATORS

An aging workforce has several implications for workers in Clatsop County. As older employees remain in the workplace, opportunities for advancement by younger generations of workers become scarcer. This may force some younger workers to relocate outside the region. Conversely, when older workers do retire, the knowledge, skills and experience they have acquired over a lifelong career also leaves with them. This may have consequences for on-the-job training and institutional knowledge that younger workers may not be able to receive. Finally, as the overall age of the County's population increases, there will be impacts on the healthcare sector as the need for gerontological services and other types of medical care may increase.

Housing Affordability and Availability

The rapid increase in housing costs, both ownership and rental, continues to be near the top of the list of threats to economic growth in Clatsop County. The 2024 community questionnaire developed in conjunction with this document confirms this concern. When asked what the potential threats to a healthy economy are, the top two answers were "Housing Affordability" and Housing Availability". It is not that housing does not exist within the county, rather demand and availability are impacting affordability for local employees. The supply of housing does not match the needs of the community. The 2019 Clatsop County Housing Study indicated that there were adequate numbers of residences, however, the concentration of second homes and vacation rental homes leaves the county short on homes for residents and employees. Employers have cited housing shortages and pricing as critical problems facing the future growth of the economy.

As a response, the City of Cannon Beach started the Regional Housing Task Force (RHTF) to coordinate a regional response with Clatsop County, area municipalities and local employers to study the causes of the problem and to prepare a regional response. The RHTF is currently working on a regional analysis of buildable lands, current housing stock, and infrastructure needs. It will provide the County and municipalities with a better understanding of the current housing and infrastructure needs and identify strategies to increase housing at all levels of need.

The original 1980 comprehensive plan Goal 10 (Housing) cited the rising cost of housing, both ownership and rental, as a critical concern.

"Family incomes have not been able to keep up with rising home prices. Over a period of eight years, median family incomes in the county have risen 99% or 12% annually while home prices have increased 215% or 27% annually. This fact, however, has not slowed sales...The present mortgage interest rate is expected to rise even further since the ceiling is now 12%. This impact of inflation on interest rates has been the most important factor in increasing the difficulty of buying a home for the first time."

Housing prices vary greatly across the county. Areas in close proximity to desirable natural resources such as rivers, the Pacific Ocean, forests or mountains have higher housing costs than

SECTION 2: CURRENT ECONOMIC INDICATORS

those in low amenity areas. The demand for second homes and vacation rental units remains high and in January 2025, Clatsop County instituted a cap on short-term rentals in specific geographic areas of the county. Redfin.com Clatsop County housing market analysis reports that the median sale price for house sales in February 2025 was \$431,057, which is a 4.6% increase over February 2024 when the median sales price was \$412,156. Comparatively, the 1980 Goal 10 Housing element noted that “the average sales price for a home in Clatsop County in 1970 was \$13,400 and by 1978, that figure had increased to \$43,321.” The report even predicted that housing prices could reach \$100,000 by 1985.

Figure 2.18. Clatsop County Home Price to Income Ratio (1970, 1978, and 2025)

	1970	1978	2025
Median Household Income	\$8,730	\$18,823	\$81,400*
Average Home Price	\$13,400	\$43,321	\$431,057
Home Price to Income Ratio	1.53	2.30	5.30
		% Increase	\$ Increase
Median Household Income Increase (1970-2025)		~832%	\$72,670
Median Home Price Increase (1970-2025)		~3,117%	\$417,657

*Based on HUD FY 2025 Median Family Incomes for Nonmetropolitan Portions of Oregon
Sources: Clatsop County; Redfin.com, U.S. Department of Housing and Urban Development

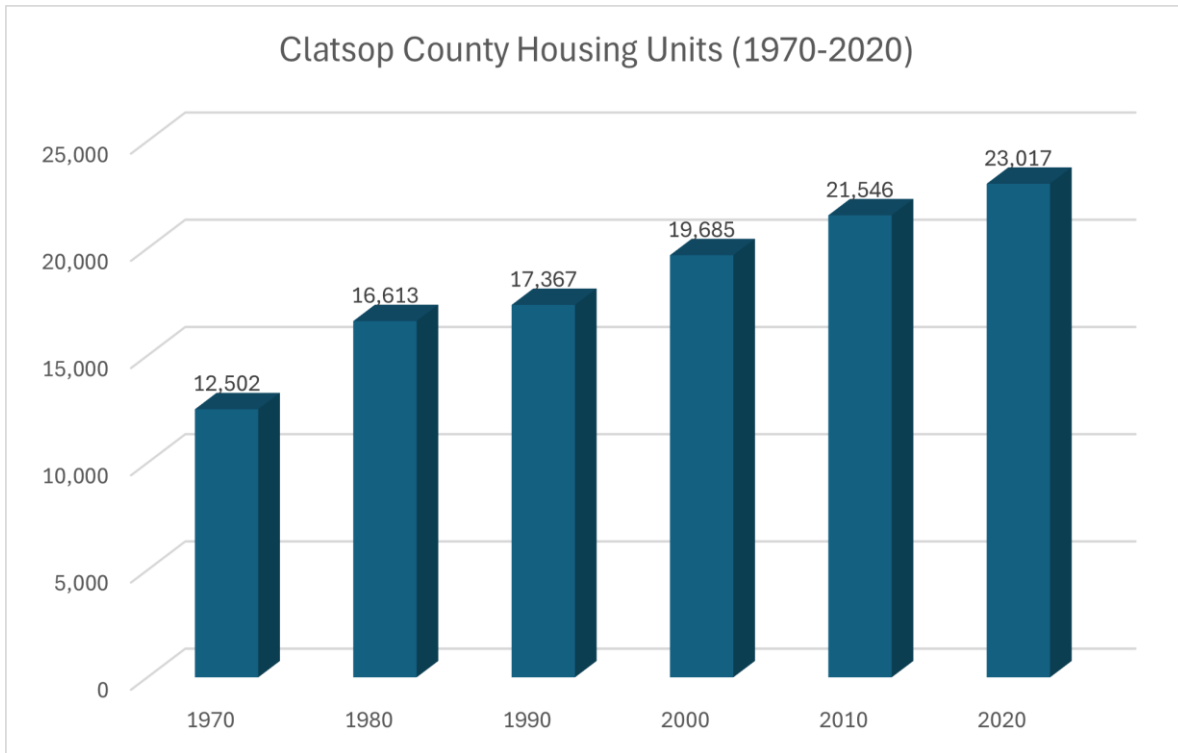
As detailed above, the cost of housing has far outpaced the income levels within Clatsop County. While household incomes have risen dramatically, the housing costs have increased more than 32 times faster. While many workers, including those in the higher income economic sector, struggle to find housing, the number of housing units within the county continues to increase, nearly doubling in the past 50 years.

Over the past fifty years, the number of housing units available in Clatsop County has risen almost twice as quickly (84%) as the rate of population growth (44%) (Figure 2.19). National trends towards smaller households, the general aging of the population, and the growing number of vacation rentals and second homes in recreational counties are the likely causes for this trend.

Dwelling unit vacancy rates have also risen over the past 40 years (Figure 2.20). In 1979 an estimated 18% of county dwelling units were vacant. That percentage rose to nearly 24% in 2020 although it is down slightly from its peak of nearly 27% in 2010. In all cases, these rates are double to triple the State of Oregon’s averages. The 2020 Decennial Census estimated that approximately 23.8% (5,484 units) were categorized as vacant within Clatsop County. Vacant housing units can include not only vacation homes and short-term rentals, but also new units that are not occupied, units where the occupants are temporarily absent, or units that are undergoing renovations.

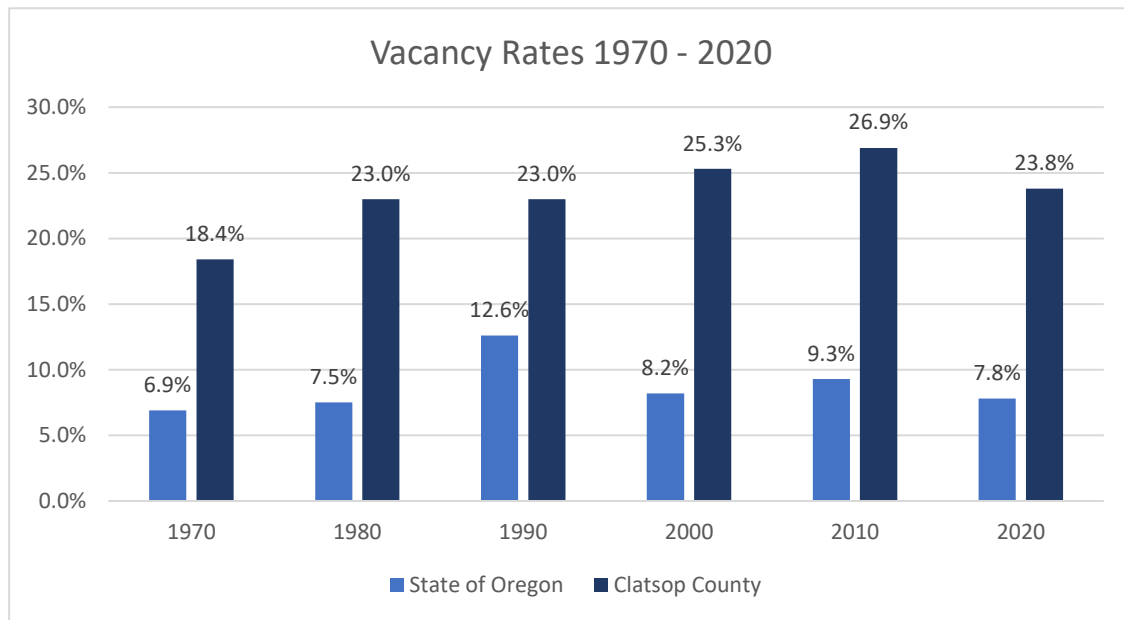
SECTION 2: CURRENT ECONOMIC INDICATORS

Figure 2.19. Clatsop County Housing Units



Source: US Census Data Reports

Figure 2.20. Housing Vacancy Rates (1970-2020)



Source: US Census Data Reports

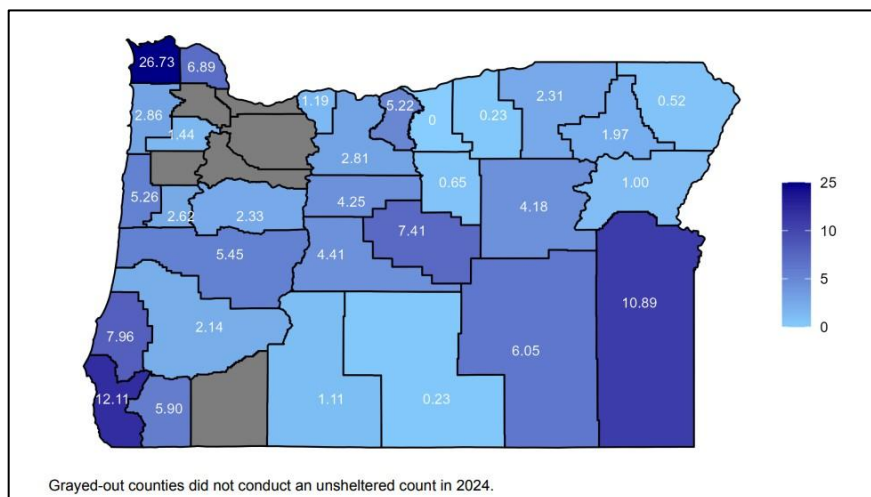
SECTION 2: CURRENT ECONOMIC INDICATORS

Even within Clatsop County vacancy rates vary dramatically. Coastal recreation-oriented communities, including Gearhart, Seaside, and Cannon Beach have higher vacancy rates than Warrenton and Astoria. Each municipality has established regulations affecting the number and location of short-term or vacation rental units. Clatsop County has recently enacted a cap on the number of short-term rentals in certain geographic areas of the county.

These statistics demonstrate why the county is coordinating a regional review of housing needs and production through the Clatsop County RHTF. The group, with representation from all five cities and the county, is preparing a County Housing Study with assistance from the Oregon Department of Land Conservation and Development (DLCD). The residential buildable lands inventories will be used by each community to address the construction of needed housing within the county. This work will also place the County and its municipalities in a strategic position with regard to the requirements of the Oregon Housing Needs Analysis (OHNA). On December 5, 2024, the Land Conservation and Development Commission (LCDC) adopted the first phase of rules implementing the OHNA. The OHNA Methodology report issued in December 2024 indicates that the five incorporated municipalities will need to construct 5,756 new dwelling units over the next 20 years.

Houselessness rates are also an indicator of the overall condition of an economy. A January 2025 Oregon Housing and Community Services report entitled “2024 Oregon Statewide Homelessness Estimates”, indicated that Clatsop County had the highest unsheltered homeless population per capita of any county in Oregon at 26.73 per 1,000 population. The next highest houselessness rate was in Curry County at 12.11 per 1,000 population. The 2024 data indicated that rural counties had a higher rate of homelessness than urban counties. In terms of raw numbers, Clatsop County has the fourth highest houseless population of any county in Oregon (behind Multnomah, Lane, and Deschutes Counties). While the point-in-time counts are not perfect statistics, they are the best information available. The County continues to work with local service providers to address the houselessness crisis.

Figure 2.21. County Unsheltered Homelessness Per 1,000 Residents (2024)



As the types of employment opportunities evolve, Clatsop County’s response to that evolution will determine its ability to ensure that all residents are able to attain safe and affordable housing. That in turn will assist in creating a foundation of stability and certainty for employers and employees.

Source: Oregon Housing and Community Services

Section 3: Future Economic Trends




Naval Hospital c. 1953 Source: Clatsop County Historical Society

Population Trends

Population projections are completed by the Portland State University (PSU) Population Research Center. On June 25, 2024, PSU released new 50-year population forecast for Clatsop County. The forecast estimates that by 2074, Clatsop County will have a total population of 44,176, a 7.6% increase from 2020.

Figure 3.1 PSU 2074 Population Forecast



UGB	Estimate: 1990	Estimate: 2020	Estimate: 2022	Forecast: 2054	Forecast: 2074
County Wide	33,301	41,072	41,971	45,558	44,176
Astoria	10,048	10,282	10,354	10,719	9,732
Cannon Beach	1,200	1,523	1,541	1,646	1,617
Gearhart	1,224	1,897	2,026	2,241	2,287
Seaside	5,583	7,329	7,489	8,772	9,082
Warrenton	3,314	6,313	6,458	7,892	8,080
Areas Outside UGB	11,932	13,728	14,103	14,288	13,377

While the County’s overall population will increase by just over 3,100 persons, the distribution based upon age will result in a vastly older population than in 2020. By 2054, PSU estimates that 22,557 persons will be aged 55 years or older compared to 17,088 persons in 2024. That represents a 32% increase over a 30-year period that will have significant impacts on Clatsop County’s workforce.

PSU’s population forecast was based upon the following assumptions:

- 1) The economy would continue to strengthen, resulting in an increase in net in-migration and a corresponding growth in housing construction.
 - a) Despite slowing towards the end of the last decade, recent net in-migration will accelerate in the nearer-term and then decline a bit.
 - b) Net in-migration will occur over the entire forecast horizon.
- 2) National trends were incorporated into the assumptions for fertility and mortality rates.
 - a) As a result of aging Baby Boomers, deaths increase and peak in 2040, with total deaths tapering through 2050.
 - b) Total fertility rates decline throughout the entire forecast period.
 - c) As a result the County will continue to experience natural decrease but at a greater magnitude.
- 3) Population increases will become more dependent on net in-migration.

SECTION 3: FUTURE ECONOMIC TRENDS

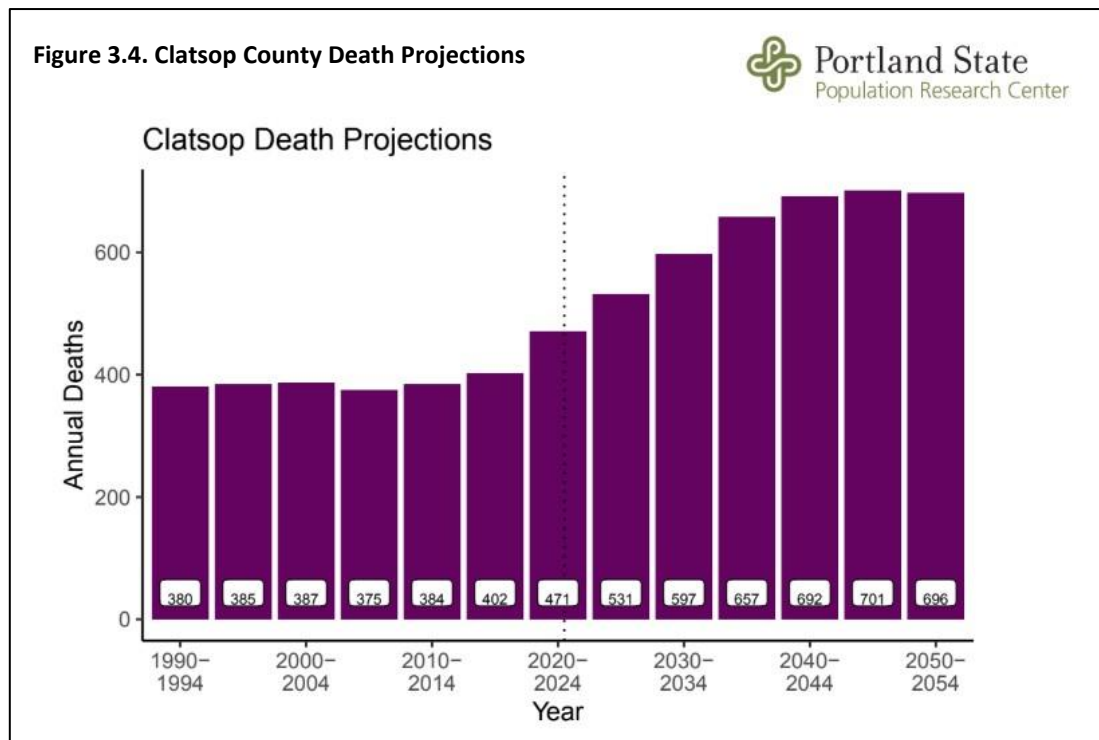
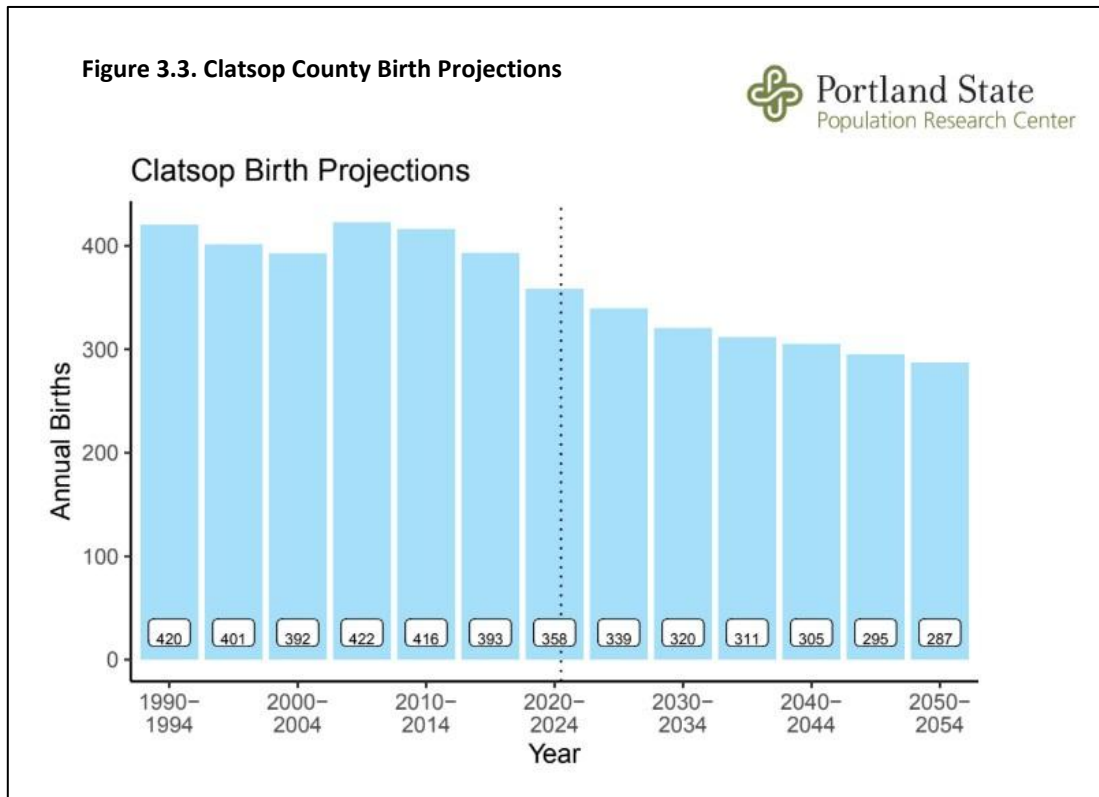
Figure 3.2 PSU 2054 Population Forecast by Age



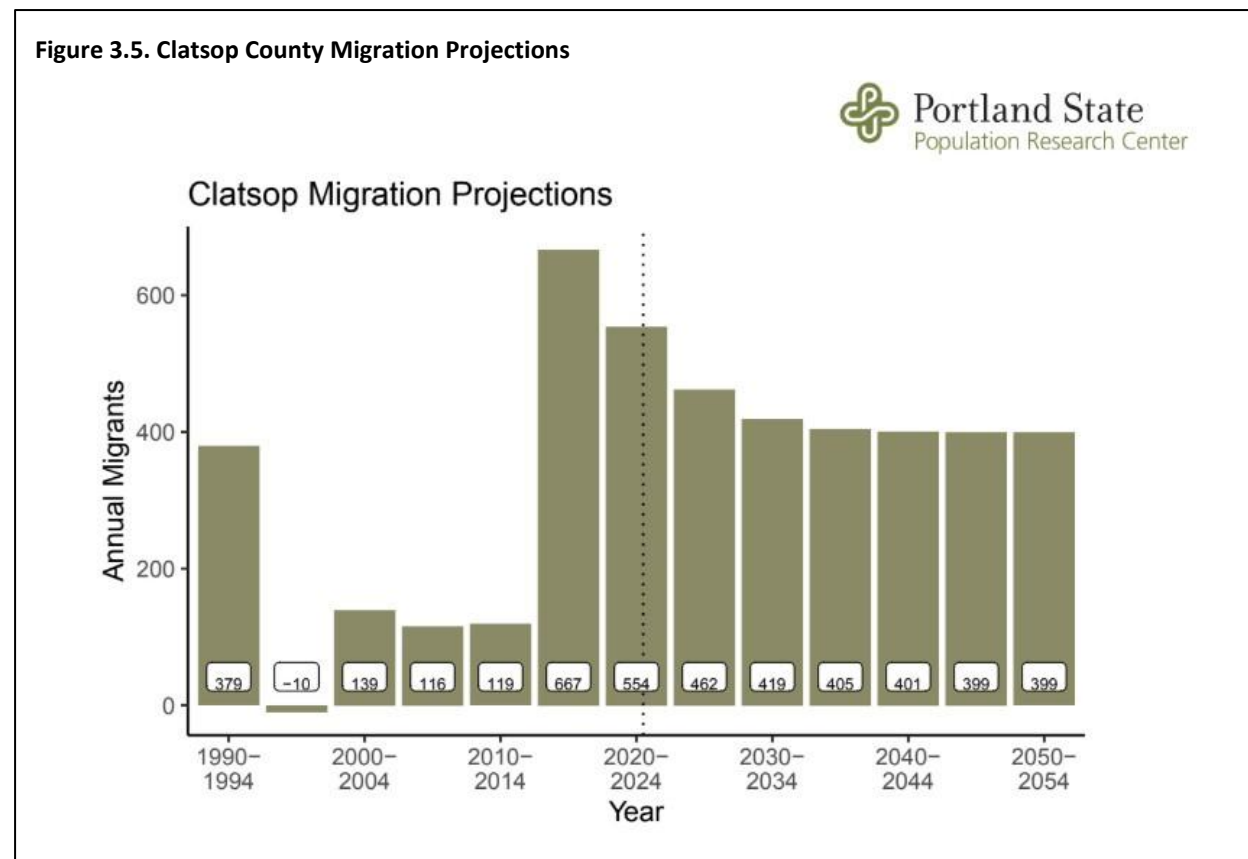
Age	2024	2029	2034	2039	2044	2049	2054
0-4	1,808	1,731	1,624	1,568	1,537	1,493	1,427
5-9	1,967	1,845	1,757	1,647	1,591	1,559	1,516
10-14	2,216	2,061	1,931	1,841	1,731	1,674	1,643
15-19	2,277	2,417	2,246	2,111	2,020	1,909	1,853
20-24	2,144	2,319	2,442	2,267	2,132	2,041	1,930
25-29	2,183	1,988	2,155	2,276	2,101	1,966	1,876
30-34	2,435	2,250	2,047	2,210	2,329	2,155	2,021
35-39	2,746	2,655	2,452	2,245	2,405	2,524	2,351
40-44	2,873	2,984	2,872	2,663	2,457	2,616	2,734
45-49	2,655	3,068	3,160	3,044	2,837	2,633	2,790
50-54	2,464	2,920	3,299	3,381	3,265	3,061	2,861
55-59	2,670	2,716	3,136	3,497	3,576	3,464	3,266
60-64	3,171	2,940	2,959	3,360	3,709	3,790	3,686
65-69	3,469	3,339	3,102	3,120	3,511	3,853	3,940
70-74	3,199	3,374	3,253	3,043	3,073	3,456	3,791
75-79	2,336	2,812	2,983	2,893	2,724	2,770	3,137
80-84	1,311	1,824	2,222	2,380	2,322	2,204	2,264
85+	932	1,123	1,545	1,997	2,323	2,456	2,473

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SECTION 3: FUTURE ECONOMIC TRENDS



In general, population will increase slightly over the next few decades and stabilize or decline slightly after 2050. These conclusions could significantly impact the economic growth for some employment sectors and the ability to fill positions for some businesses.

Clatsop County has outperformed the population projections for the past two projection cycles. For example, in 2017 PSU projected that the population in 2020 would be 39,381. The 2020 Census showed a resident population of 41,072. PSU’s 2024 certified estimate indicates a population of 41,785 which exceeds the 2017 projections for 2050. More recent population estimates do show a slight decrease in state and county population beginning around 2070.

The county has benefitted from higher net in-migration numbers, especially over the past decade. PSU projects that net-migration will stabilize with the population increasing by approximately 400 people annually. The stabilization of the in-migration numbers and potential for declining local birth numbers suggests a stable population. The availability and types of employment and housing costs will directly impact this estimate.

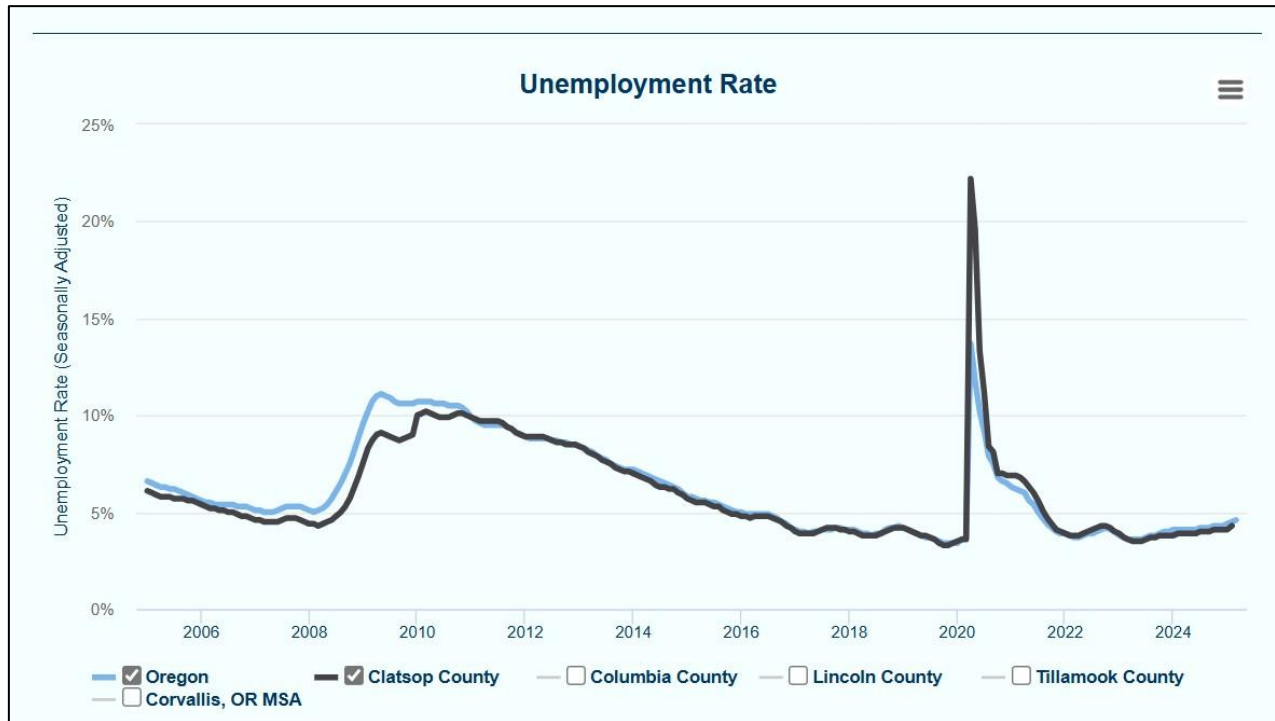
Employment and Income Trends

For the past 25 years, Clatsop County unemployment rates have mostly mirrored the state unemployment trends. Most notably in Figure 3.6, the start of the COVID pandemic in 2020

SECTION 3: FUTURE ECONOMIC TRENDS

caused a spike in the overall unemployment rate in both the state and Clatsop County. The spike for Clatsop County was more significant because of the nature of the major employment sectors, especially the tourism sector. Current unemployment rates (February 2025) are slightly lower than the state average and lower than the two surrounding counties.

Figure 3.6. Historical Unemployment Rate – State of Oregon and Clatsop County



Source: Oregon Employment Department

Figure 3.7. State Seasonally Adjusted Unemployment Rate (December 2024)



Source: Oregon Employment Department

SECTION 3: FUTURE ECONOMIC TRENDS

Compared to most counties in Oregon, Clatsop County’s unemployment rate remains low. The Clatsop County unemployment rate in February 2025 was 4.3%, the second lowest of any Oregon coastal county.

Big Three Employment Trends

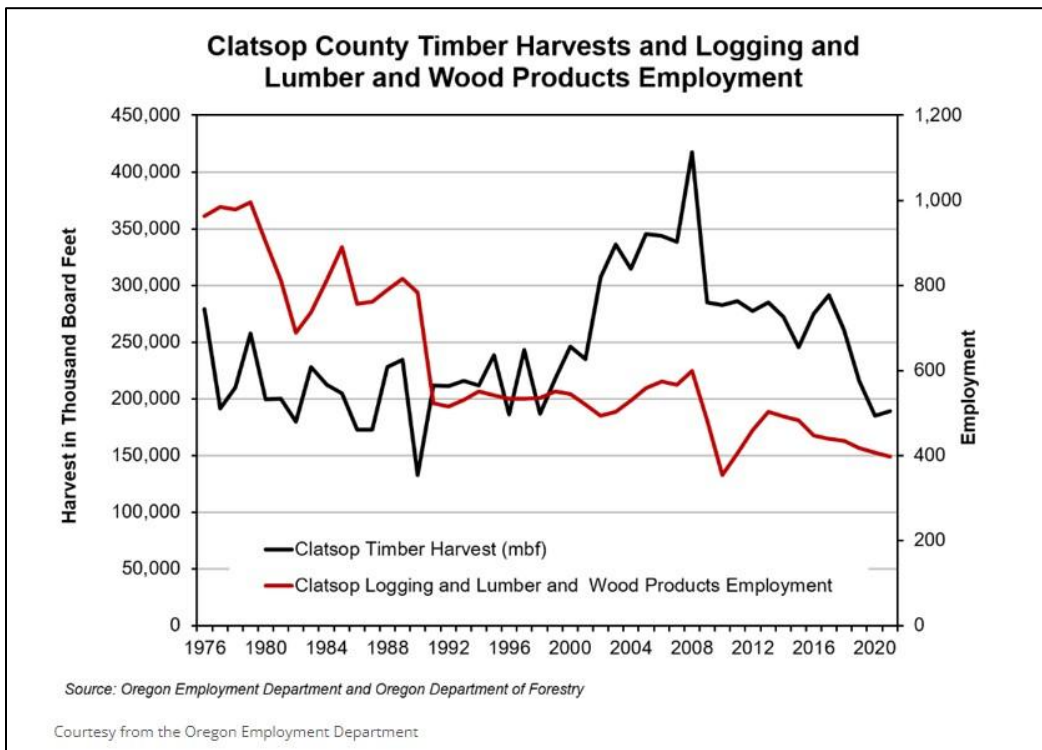
As noted, Clatsop County has historically identified its “Big Three” employment sectors as timber, fisheries, and tourism. Each sector has historically been part of the highs and lows of the local economy due to their seasonality and vulnerability to trends in national or international economic cycles and changing regulations. The following section looks at historical job trends for each of the big three industries.

Forest Sector

Almost 80% of Clatsop County’s land area is classified as forest lands. The majority of those lands are under large private ownership (56%), with public ownership (26%) and small private ownership (17%) comprising the remainder. As of 2022, the Clatsop Forestry and Wood Products Economic Development Committee (CFEDC) documented 1,315 forest sector jobs within Clatsop County, or 6.3% of the total employment within the county.

Timber employment figures are challenging to lock down as many people involved in this sector are not directly tracked by traditional statistical sources, as many are self-employed. Figure 3.8 shows a general decline in logging and wood products employment (red line) with fluctuations

Figure 3.8. Timber Harvests and Employment Data



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in the harvest levels (black line) shown over the past 28 years. It is unclear how these statistics will change over time due to impacts from the Oregon Department of Forestry's implementation of the Habitat Conservation Plan (HCP). Jobs in the timber industry typically provide living wage employment opportunities, even though they may be seasonal in nature. The HCP will also affect the fiscal resources of local governments, including Clatsop County, schools, and special districts. Clatsop County has estimated that the total revenue loss per year to all impacted jurisdictions, businesses and districts will be approximately \$13.6 to \$15.1 million. (Daily Astorian, January 5, 2024.)

The harvesting of trees is only one aspect of employment within the timber industry. Trucking businesses, processing/manufacturing and sawmills are all directly tied to Clatsop County's forests. The Oregon Employment Department has identified five major categories for Oregon's forest sector:

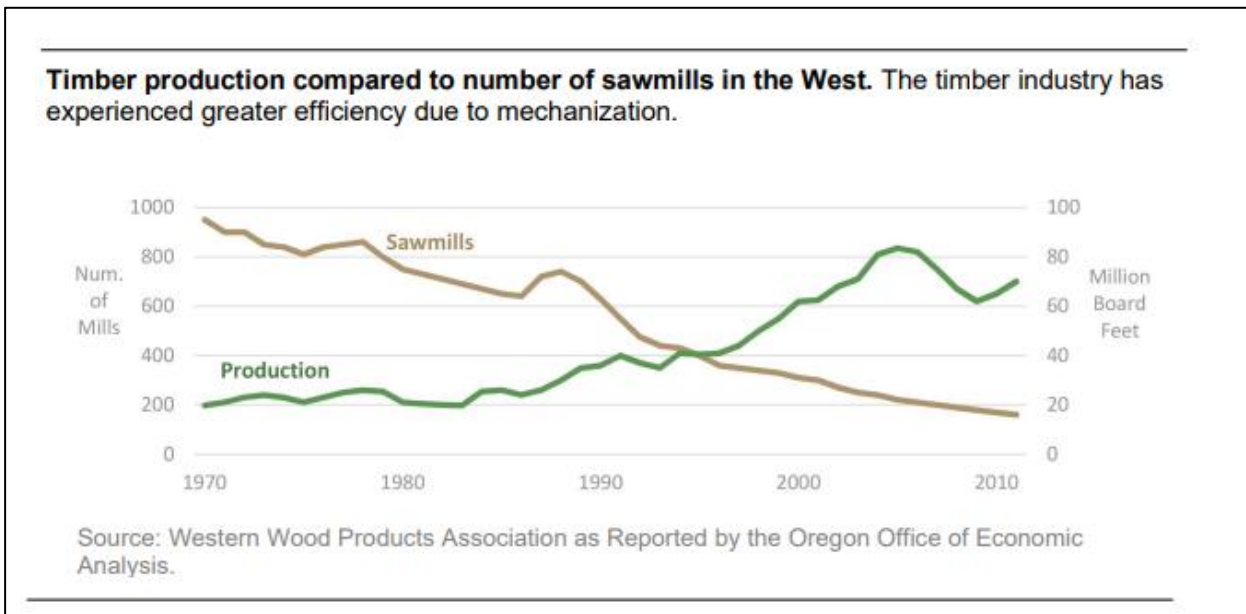
- primary forest products
 - sawmills
 - softwood veneer and plywood manufacturing
 - paper manufacturing
- secondary forest products
 - millwork
 - wood kitchen cabinets and countertops
- forest management
 - state and federal agencies
 - private forest sector-related firms
- forestry support
 - forestry economics
 - forest firefighting
 - timber estimation
- forestry-dependent industries
 - lumber/plywood wholesalers
 - biomass power generation

While Clatsop County remains home to Wauna Mill (Georgia Pacific), Hampton Lumber, Warrenton Fiber Company, and numerous independent forest businesses, technological changes will also have an impact on employment within the forest sector. As shown in Figure 3.9, statewide, the number of sawmills has decreased steadily while the board-feet production and processing has increased. According to the American Forest Resource Council, seven mills in Oregon closed in 2024. (Barnes, 2024) Changes to timber land availability and state and federal regulatory changes like the HCP will continue to challenge this sector.

As noted above, employment within the forest sector often offers living wage jobs. The Oregon Employment Department notes that the median entry-level salary for logging workers, including log graders and scalers and logging equipment operators, ranges from \$58,000 to approximately \$63,000 for employees with a high school diploma or equivalent. In 2022, the

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Figure 3.9. Timber Production and Facilities Trends



Source: Oregon Employment Department

Clatsop Forestry and Wood Products Economic Development Committee (CFEDC) noted that the average wagger for forest sector jobs within Clatsop County was \$70,599.

Per information from CFEDC, almost 30% of Clatsop County’s economic base has been tied to the forest sector. The Oregon Employment Department estimates that in the Northwest Region of the state (Clatsop, Columbia, Tillamook, Lincoln and Benton counties), the number of jobs in the Mining and Logging sector will decrease from 720 positions in 2023 to 690 positions in 2033. Statewide, the number of logging-related jobs is projected to remain relatively flat, with a slight decline from 4,182 jobs in 2023 to 4,163 jobs in 2033.

Fisheries

In July 2024, the Oregon Employment Department issued a report on Oregon’s commercial fishing sector. The report found that for 2023, the state’s commercial fishing industry landed 301 million pounds of seafood with a value of \$178 million. That was an increase from 2022, when 286 million pounds were landed with a value of \$135 million. The 2023 total, however, was still lower than the average landings and revenue of the previous five years (20188-2022), when 319 million pounds, with a value of \$189 million, was landed (Figure 3.10). In 2023, fishing employment ranged from a high of 1,590 fishers in May to a low of 515 in November. Five coastal counties – Clatsop Coos, Curry, Lincoln and Tillamook – had 95% of that total employment. Figure 3.11 shows that Clatsop County ranks second in average annual commercial fishing employment for counties in the State of Oregon.

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Figure 3.10. Oregon Commercial Fishing Landings and Revenue (1981-2023)

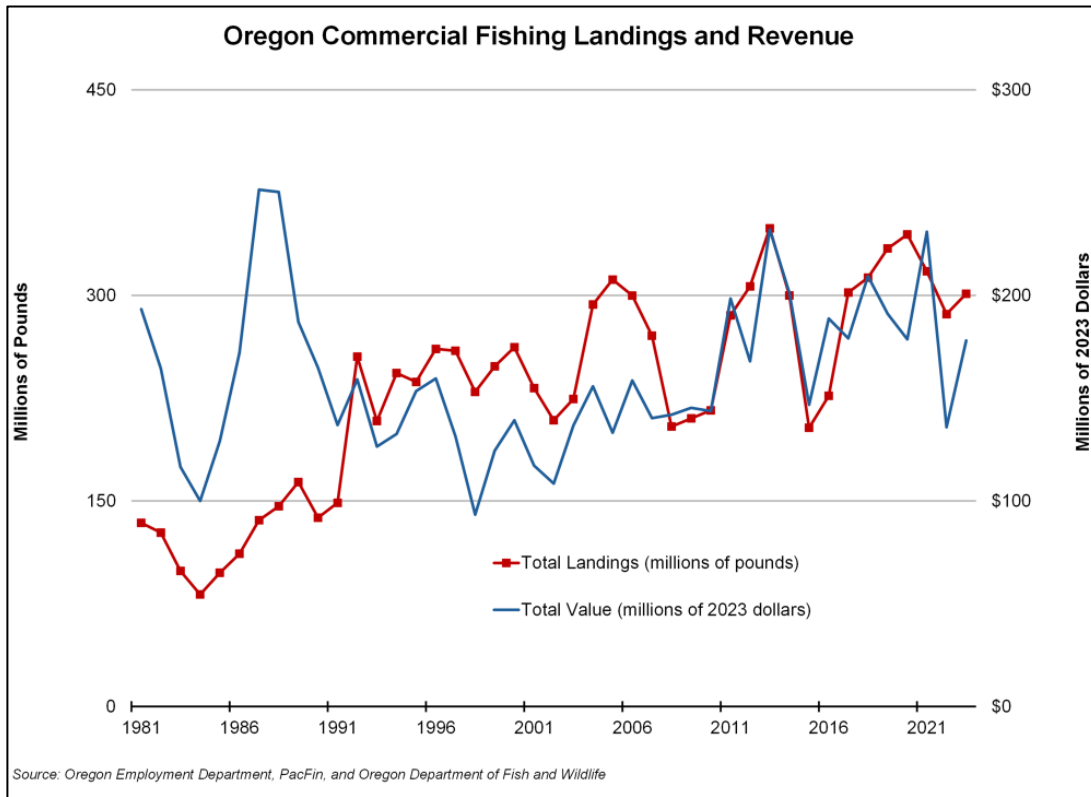
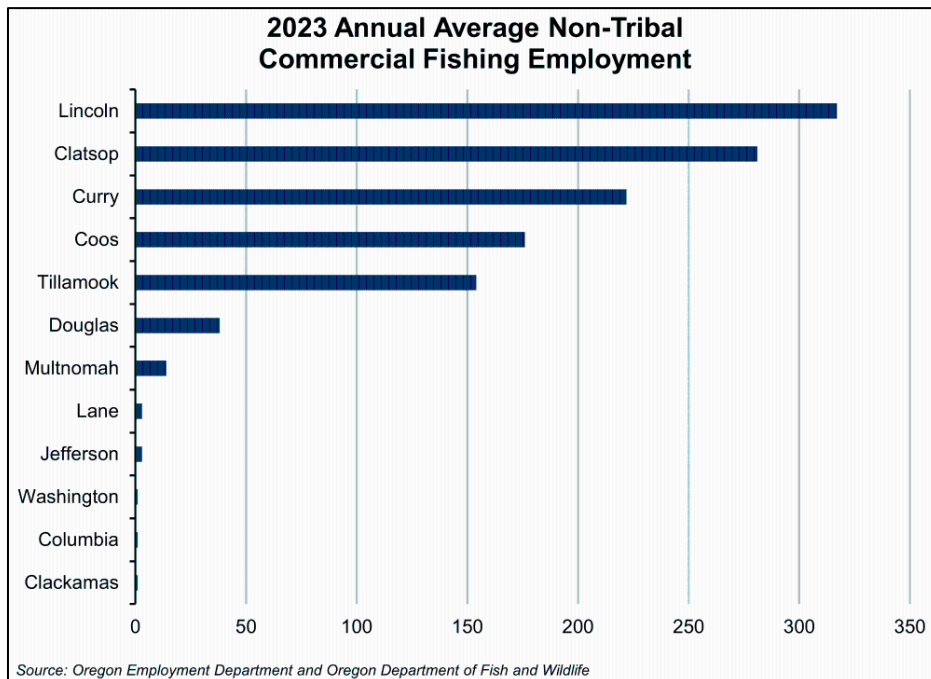


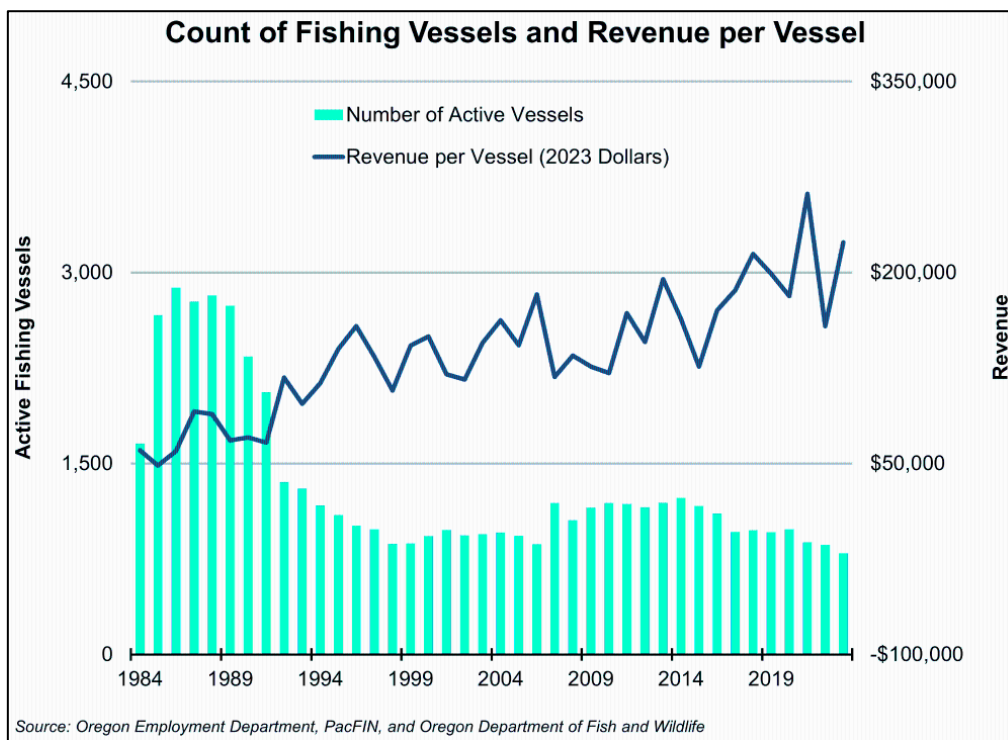
Figure 3.11. Oregon Counties Fisheries Employment



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Like many resource-based employment sectors, mechanization and business efficiencies have impacted fisheries employment. There are fewer commercially registered vessels, but the size of vessels and revenue per vessel is trending upwards in constant dollars. Regulatory changes to the fisheries on the Columbia River have also impacted overall employment. Despite these changes, however, in 2021, the Oregon Department of Fish and Wildlife reported that Astoria was ranked 25th out of 30 top commercial fishery landings, based upon value. In 2021, Astoria saw 154.5 million pounds of fish landed, with a total value of \$52.7 million. In 2022, the Oregon Employment Department reports that the fishery ports of Astoria, Charleston and Newport accounted for 79% of all commercial fish landings in Oregon based upon value.

Figure 3.12. Oregon Fishing Vessels and Revenues (2023 Dollars)

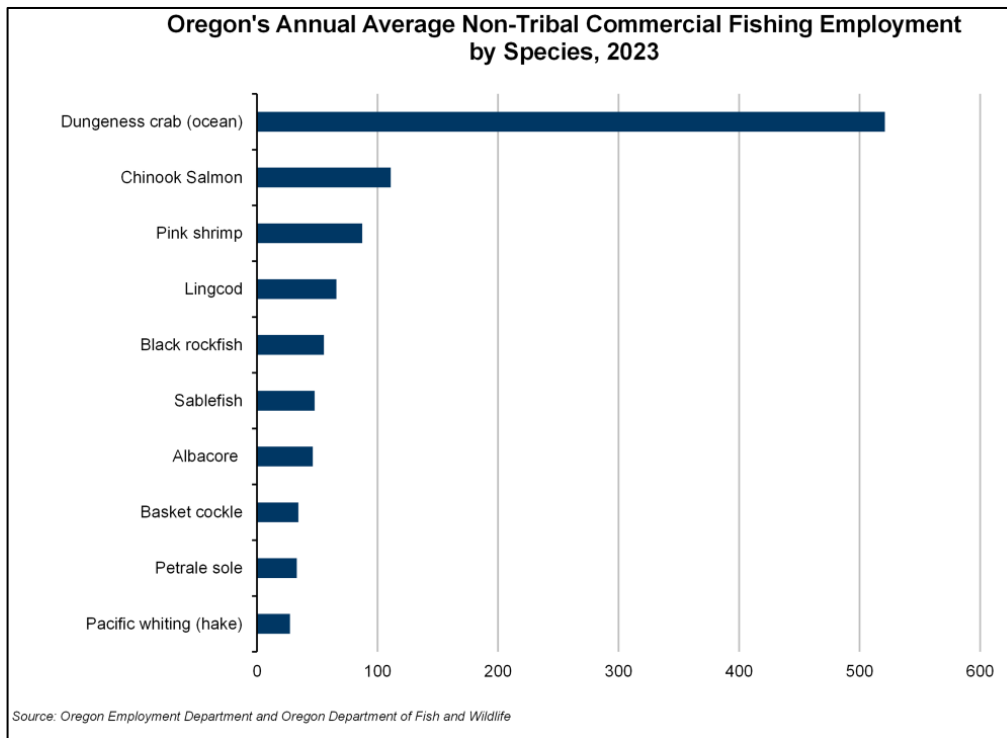


Closely linked to the fisheries sector is the seafood processing industry. In 2023, the Port of Astoria estimated that seafood process contributed over \$100 million to Clatsop County’s economy each year. The Oregon Employment Department found that the processing industry paid more than \$49 million in wages in 2023.

By species, the Dungeness crab fishery generated the most jobs (almost 525) in 2023. While the 2023 crab harvest was twice as large as the previous five-year average – 37.2 million pounds in 2023, compared to the five-year average of 18.3 million pounds – low prices for crab impacted the overall revenue of the industry. These price fluctuations, combined with late openings or limited fishing seasons create economic volatility for those employed within the fishing industry. Figure 3.13 details the average commercial fishing employment generated by fishery.

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Figure 3.13. Oregon Commercial Fishing Employment by Species (2023)



While the fishing industry remains a significant component of the County’s economic base, the Oregon Coast Visitors Association (OCVA) has estimated that over 90% (\$105 million) of seafood sold in restaurants, food stores and institutions is sourced from other domestic or international markets. In September 2021, OCVA launched the Ocean Cluster Initiative with the goals of adding value to locally harvested seafood and increasing the availability of Oregon seafood and aquaculture products. OCVA estimated that if consumption of local seafood increased by 10%, an additional \$90 million would be added to Oregon’s coastal economy. Additionally, development of products that would allow 100% of a fish to be used, would increase the value per fish and would generate new manufacturing and production jobs. This concept will be discussed in further detail in Section 4.

With regard to future employment trends, State economic analysts note that tracking employment and overall financial impact of fisheries jobs is difficult due to the nature of the ownership, employment seasonality, and reporting requirements. Even with regulatory changes to the fishing industry, it remains one of the largest economic generators in the area and will likely continue to be so over the next 20 years.

Recreation and Tourism

The leisure and hospitality industry has a long history in Clatsop County. From the Portland “Daddy Trains” of the early 1900s to the original motor lodges along the small roads that served the region during the summer season to the new larger facilities and support businesses that work to make the region a year-round destination, Clatsop County tourism is truly one of the

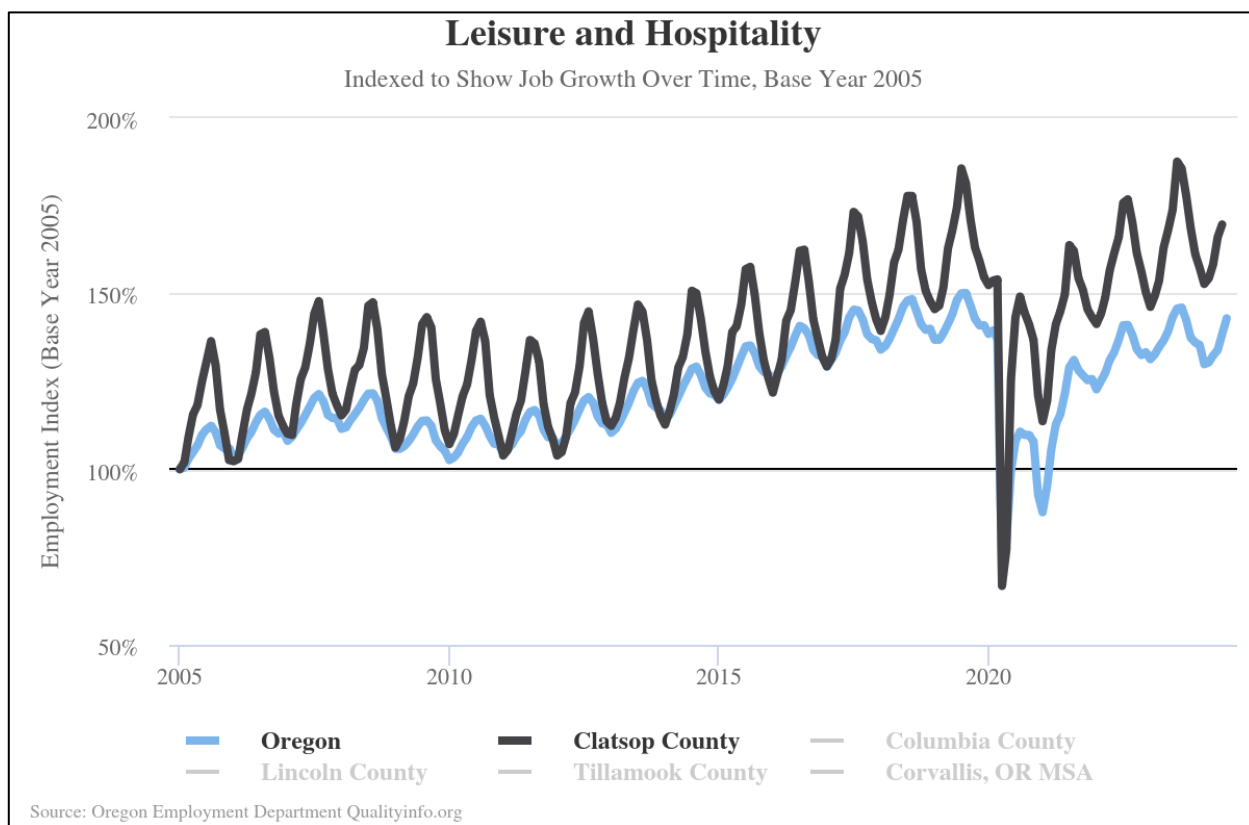
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big three sectors in terms of overall employment numbers. Two of the concerns identified in past economic planning efforts were the seasonal nature of many of the jobs and the relatively low wage scale offered in this sector. This same concern was noted in the 1980 comprehensive plan Goal 9 element:

The tourist or travel industry is, like other major economic sectors of Clatsop County, based on use of the area’s natural resources...In direct dollar impact, the travel industry is the third most important sector. While employment opportunities in the travel sector tend to be lower paying, these jobs provide important opportunities for new labor entrants and secondary wage earners.

Figure 3.14 clearly shows the cyclical nature of leisure and hospitality jobs. Except the Covid pandemic years, the general employment numbers have moved upward.

Figure 3.14. Leisure and Hospitality Employment Trends



Tourism and recreation related jobs represent the largest portion of overall employment numbers within Clatsop County. Some local concerns expressed during the public comment process include the influx of national corporate groups in the local travel and service sector economies, particularly with regard to the management of short-term rentals. Additionally, increased rates of tourism impact local service providers including law enforcement, fire districts and water and sewer districts. As state statutes dictate how transient room tax funds

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may be spent by local governments, there is little flexibility to utilize those monies to address infrastructure and service concerns. A 2022 study commissioned by Clatsop County found that total call volume for law enforcement increases during the peak summer tourism months (Figure 3.15). Further, approximately 33% of all law enforcement bookings made by Clatsop County police were of non-residents (Figure 3.16).

Figure 3.15. Total Law Enforcement Call Volume

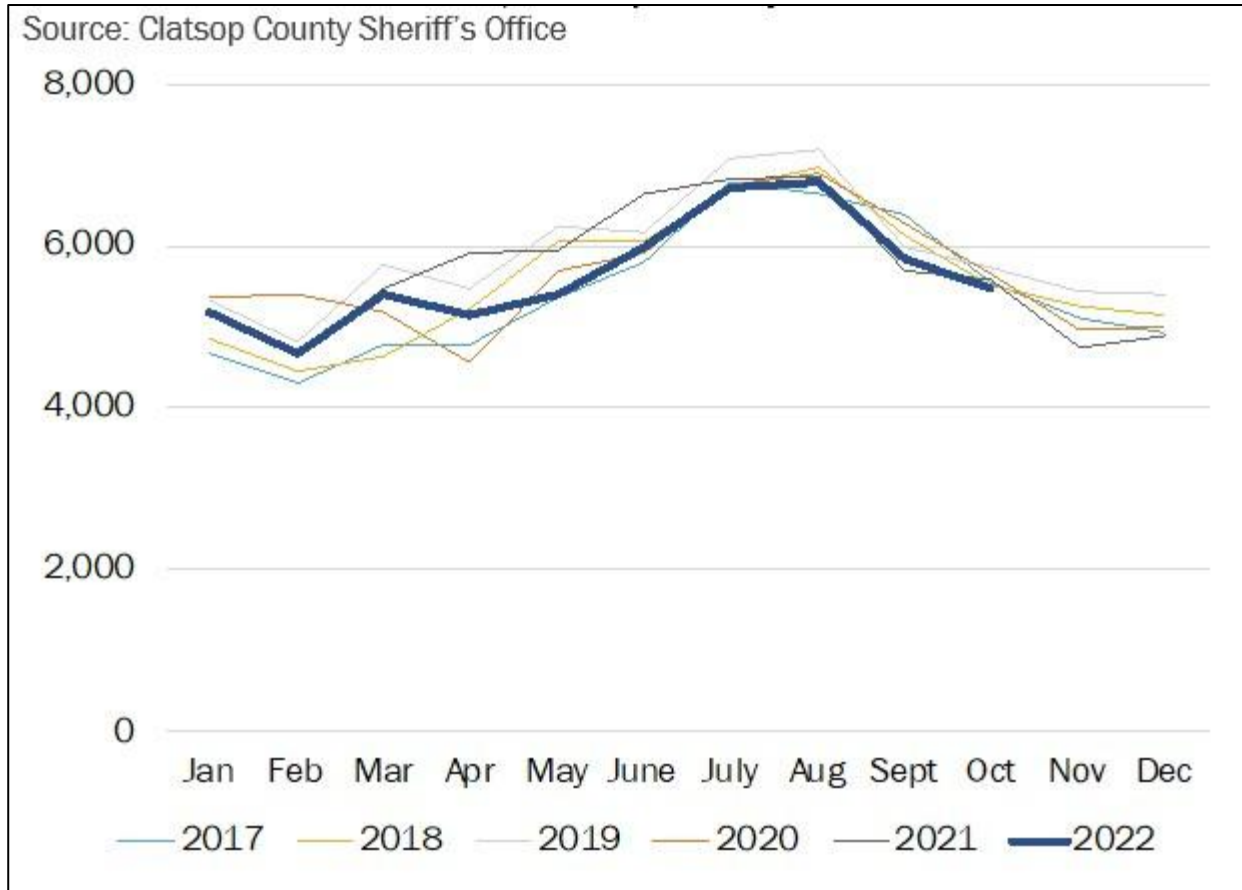


Figure 3.16. Law Enforcement Bookings, January 2022-November 7, 2022

Source: Clatsop County Sheriff's Office

Share by Locality	
Non-residents	33%
Astoria	30%
Seaside	22%
Warrenton	11%
Other Local	4%
Total	100%

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Leisure and hospitality jobs, which include both accommodations as well as food services and drinking places, is expected to grow by 1,560 by 2033 (Oregon Employment Department). That represents a 9% increase and places the tourism industry within the top 10 fastest growing employment sectors. As discussed elsewhere in this report, however, the positions created in this industry are often among the lowest paid jobs. In turn, many people employed in the tourism industry are then further impacted by the cost and availability of healthcare, housing, childcare, and transportation. These employee impacts then circle back to further impact the tourism sector itself – either through the need to increase prices to increase salaries or by reducing services.

Job Growth Projections

The Oregon Employment Department (OED) regularly updates future employment projections for the State, regions and by economic sectors. The most recent projections were completed for the timeframe 2023 – 2033. OED projects that statewide total employment will increase by 8% over the 2022-2032 timeframe. Overall, employment in the Northwest Oregon region (Benton, Clatsop, Columbia, Lincoln and Tillamook counties) is expected to have a 6% growth rate – slightly less than the state.

More specifically, the projection detailed the following sectors which will either grow or contract between 2023 and 2033 in the Northwest Oregon region:

Figure 3.17. Northwest Oregon Industry Employment Projections (2023-2033)

Employment Sector	2023 Employment	2033 Employment	Change	% Change
TOTAL EMPLOYMENT	112,220	119,210	6,990	6%
Increased Growth				
Construction	4,390	4,970	580	13%
Food Manufacturing	2,290	2,490	200	9%
Government, State	1,530	2,600	70	5%
Government, Local	23,500	24,130	630	3%
Accommodation and Food Services	15,890	17,300	1,410	9%
Accommodation	4,240	4,790	550	13%
Food Services and Drinking Places	11,650	12,510	860	7%
Private Educational and Health Services	14,300	16,100	1,800	13%
Professional and Business Services	8,120	9,120	1,000	12%
Trade, Transportation and Utilities	14,840	15,390	550	4%
Retail Trade	11,800	12,150	350	3%

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Figure 3.17. Northwest Oregon Industry Employment Projections (2023-2033)

Employment Sector	2023 Employment	2033 Employment	Change	% Change
Wholesale Trade	1,060	1,140	80	8%
Transportation, Warehousing, and Utilities	1,980	2,100	120	6%
Decreased Growth				
Government, Federal	1,180	1,160	-20	-2%
Mining and Logging	720	690	-30	-4%
Paper Manufacturing	1,270	1,000	-270	-21%
Wood Products Manufacturing	1,100	1,080	-20	-2%

Source: Oregon Employment Department, Workforce and Economic Research Division

With regard to wages associated with these jobs, the Oregon Employment Department also published a forecast of high-wage, high-demand jobs for the years 2023-2033. An occupation is considered “high-wage” if it has a median annual wage greater than \$47,445. Food service, entertainment and recreation, and lodging managers all fall into the high-wage, high-demand list, with employment growth increasing between 4.9% (food service managers) to 18.1% (lodging managers). Demand for entertainment and recreation managers is estimated to increase by 17.2% by 2033. Non-managerial positions, which are the majority of the service industry workforce, are not considered high-wage jobs.

These projections, in conjunction with other local trends, have directly guided the recommended growth sector selections for this plan, as well as the goals and actions contained in Section 5. It should be noted, however, that as these projections are now two years old, new economic circumstances at the state, national and international levels may significantly alter these numbers.

Housing Trends

The Regional Housing Task Force (RHTF) continues to monitor housing trends in Clatsop County. The connection between housing cost and availability and a growing local economy cannot be understated. The preliminary findings from the RHTF housing, land, and infrastructure inventories conclude that:

- over 80% of land in unincorporated Clatsop County is designated as resource lands with tight restrictions on housing development
- growth and development are severely restricted by steep slopes, wetlands, and flood plain regulations in unincorporated Clatsop County and the five municipalities.
- capacity of local infrastructure (especially sanitary sewer and water) constrict development lands

SECTION 3: FUTURE ECONOMIC TRENDS

- the number of housing units within the County is not the limiting factor, rather, the percentage of homes that are vacation rentals and part-time non-primary residences restricts the housing from being used by local residents.
- most housing built in the last 10 years have been single-unit housing
- the Oregon Housing Needs Analysis is recommending that 5,756 residential units be built in Clatsop County over the next 20 years across all income cohorts. This equates to just under 300 units per year.

Figure 3.18 Oregon Housing Needs Analysis Preliminary Housing Production Goals

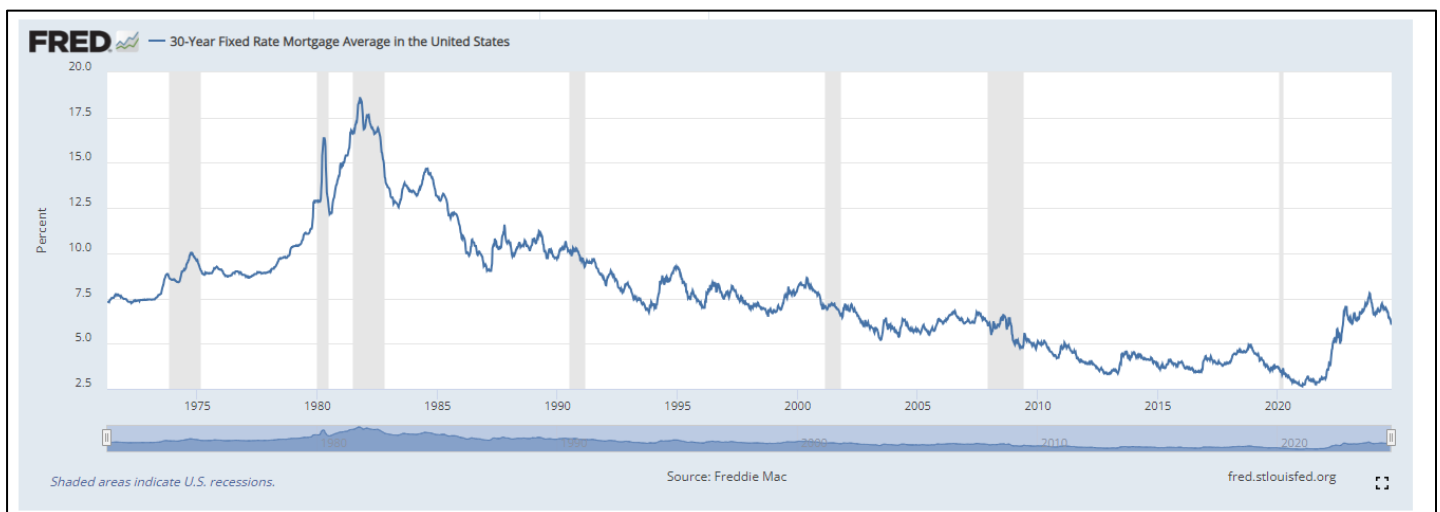
20 Year Results	Total	0-30% AMI	31-60% AMI	61-80% AMI	81-120% AMI	>120% AMI
Astoria	1,835	667	434	165	262	307
Cannon Beach	660	153	101	39	216	151
Gearhart	382	83	55	21	134	90
Seaside	1,603	467	318	124	365	329
Warrenton	1,276	429	297	117	194	241
TOTAL	5,756	1,797	1,205	466	1,171	1,118

Source: Oregon Department of Administrative Services

The County housing dashboard indicates that roughly 120 units per year have been built within the entire county.

The issues related to safe and affordable housing have influenced economic development efforts in Clatsop County for more than 40 years. The original 1980 Goal 10 Housing element details the rapid rise in the cost of housing throughout the county. “Family incomes have not been able to keep up with rising home prices. Over a period of 8 years, median family incomes in the County have risen 99% or 12% annually while home prices have increased 215% or 27%

Figure 3.19 30-year Fixed Rate Mortgage Trends



Source: Federal Reserve Data (Freddie Mac, 30-Year Fixed Rate Mortgage Average in the United States [MORTGAGE30US], retrieved from FRED, Federal Reserve Bank of St. Louis; <https://fred.stlouisfed.org/series/MORTGAGE30US>, September 26, 2024)

SECTION 3: FUTURE ECONOMIC TRENDS

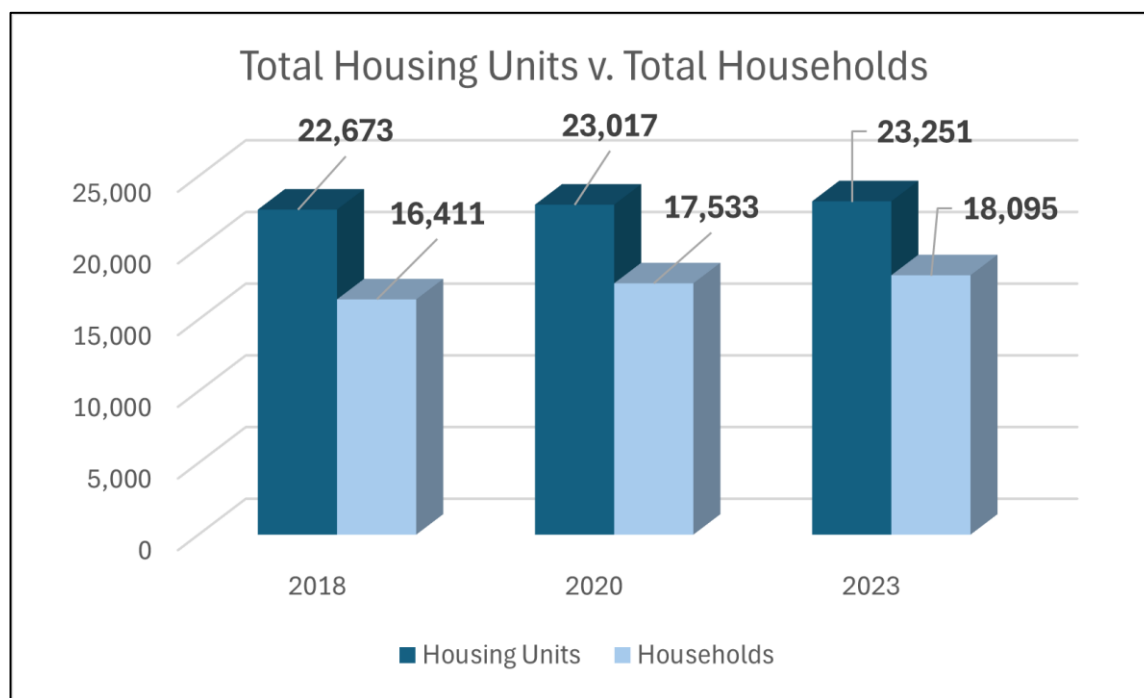
annually. This fact, however, has not slowed sales.” That plan document also discusses the problems with interest rates at or near 12%. Interest rates have a direct impact on affordability. Current interest rates are in the 5-7% range which is relatively higher than the 2021 lows at or near 3%.

The housing crisis across the state was at the forefront of the 2024 legislative session. Changes to state planning rules, new funding sources and regulatory requirements were enacted. The impact of these changes will not be known for several years. New housing requirements set production goals for cities and counties, although only cities with populations greater than 10,000 will be required to meet those goals. Preliminary figures show that an annual production of 269 housing units for Clatsop County is needed to meet current and future demand. The Clatsop County Housing dashboard indicates that there has been an average of 120 residential units added per year over the past five years.

The 2019 Clatsop County Housing Study states that the county technically has an oversupply in housing units with 1.4 housing units per permanent resident and an estimated 24% vacancy rate countywide. However, as noted above, much of the County’s housing supply is not available to residents. The 2019 Clatsop County Housing Study noted that 58% of new homes built in the County since 2010 are used as short-term rentals and/or second homes. The situation is more acute in beachside communities, particularly in Cannon Beach and Gearhart.

The 2024 EOA public questionnaire identified the cost and availability of housing (both ownership and rental) as the #1 and #2 challenges for future economic opportunities for the county. The connection between the housing crisis and the future health of the Clatsop County

Figure 3.20. Total Housing Units v. Total Households (2020)



Source: Clatsop County; 2020 Decennial Census; 2023 ACS 5-Year Estimates

SECTION 3: FUTURE ECONOMIC TRENDS

economy cannot be understated. In most cases, local units of government do not build residential units, however, the local units of government can create a positive environment for the development of public and private housing construction.

Section 4: Economic Drivers



Antin's Store, Svensen Source: Clatsop County Historical Society

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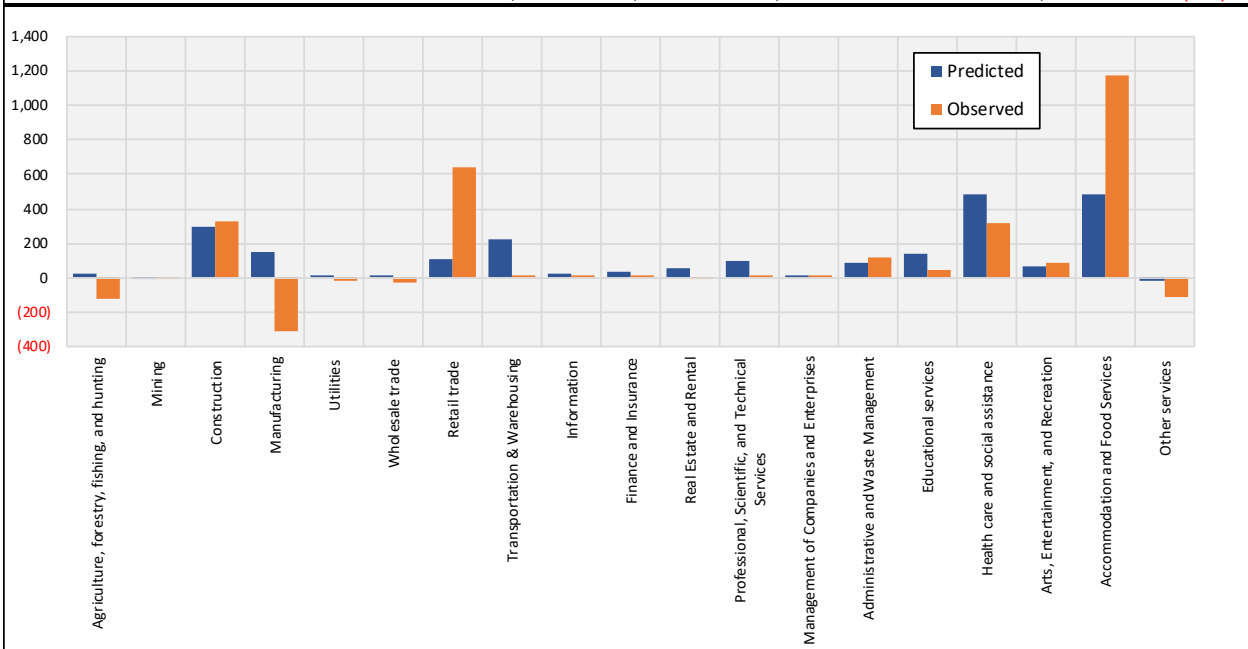
Shift Share Analysis

The identification of the economic drivers of a local or regional economy is critical in informing the character and nature of future employment, and by extension land demand over a planning cycle. To this end, Johnson Economics employed a shift-share analysis of the local economy.

A shift-share analysis is an analytical procedure that measures the local effect of economic performance within a particular industry or occupation. The process considers local economic performance in the context of national economic trends—indicating the extent to which local

Figure 4.1. Industry Sector Shift Share Analysis, Clatsop County (2012 – 2022)

Industry	Average Employment		Net Change		Standardized Level - 2022*	Regional Shift
	2012	2022	Total	AAGR		
Agriculture, forestry, fishing, and hunting	483	360	(123)	-2.9%	511	(151)
Mining	12	6	(6)	-6.7%	8	(2)
Construction	771	1,098	327	3.6%	1,065	33
Manufacturing	2,084	1,770	(314)	-1.6%	2,234	(464)
Utilities	59	36	(23)	-4.8%	59	(23)
Wholesale trade	207	174	(33)	-1.7%	219	(45)
Retail trade	2,489	3,127	638	2.3%	2,592	535
Transportation & Warehousing	408	411	3	0.1%	630	(219)
Information	149	159	10	0.7%	170	(11)
Finance and Insurance	273	288	15	0.5%	307	(19)
Real Estate and Rental	274	268	(6)	-0.2%	331	(63)
Professional, Scientific, and Technical Services	291	307	16	0.5%	388	(81)
Management of Companies and Enterprises	40	48	8	1.8%	50	(2)
Administrative and Waste Management	452	568	116	2.3%	540	28
Educational services	939	988	49	0.5%	1,079	(91)
Health care and social assistance	2,296	2,608	312	1.3%	2,782	(174)
Arts, Entertainment, and Recreation	365	449	84	2.1%	426	23
Accommodation and Food Services	3,478	4,658	1,180	3.0%	3,965	693
Other services	658	545	(113)	-1.9%	637	(92)
TOTAL	15,728	17,868	2,140	1.3%	17,992	(124)



* Employment level in each industry had it grown at the same rate as its counterparts at the national level over the same period.

SOURCE: U.S. Department of Commerce, Bureau of Economic Analysis, Bureau of Labor Statistics

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growth can be attributed to unique regional competitiveness or whether it is simply growth in line with broader trends. For example, consider that Widget Manufacturing is growing at a 1.5% rate locally, about the same rate as the local economy. On the surface we would consider the Widget Manufacturing industry to be healthy and contributing soundly to local economic expansion. However, consider also that Widget Manufacturing is booming across the country, growing at a robust 4% annually. In this context, local widget manufacturers are struggling, and some local or regional conditions are stifling economic opportunities.

The average annual growth rate by industry from 2012 to 2022 in Clatsop County was compared to the national rate. The observed local change was compared to a standardized level reflecting what would be expected if the local industry grew at a rate consistent with national rates for that industry.

As shown in Figure 4.1, most county industries grew at a slower rate than the rest of the country. Sectors that did experience a positive regional shift in employment during this period were accommodation and food services, retail trade, construction, administrative, and arts and entertainment. The sectors that outperformed expectations the most were accommodation and food services and retail trade, further highlighting how tourism is an influential factor in the county's economy. Sectors with the greatest negative regional shift in employment were manufacturing, transportation and warehousing, and health care and social assistance.

Target Industries Analysis - Industry Cluster Analysis

An industry cluster analysis was conducted to identify economic drivers in the region. This analysis looks at the relationship between the location quotient of an industry and its employment growth over the years to give useful insight into an industry's competitive performance. Location quotients are a metric that compares the concentration of employment in an industry at the local level to a larger geography. When an industry's location quotient (LQ) is compared alongside its employment growth one can identify which industries in the region have been highly competitive, display potential for growth, are decreasing in competitiveness, or underperforming.

The Target Industries Analysis separates industries/clusters into 4 categories¹ :

- 1) **Growth Clusters:** Industries that show strong concentration locally (LQ > 1.0) and have had positive employment growth in recent history. These industries are a focal point of the regional economy, displaying strong competitive advantage and potential growth.
- 2) **Mature Clusters:** Industries that have a strong local concentration (LQ > 1.0), but negative employment growth during the period of analysis. These industries have been an important factor in the local economy but may need resources to ensure growth into the future and continued competitiveness.

¹ Kaliba, Aloyce. (2014). Industry Cluster Analyses for Capital Region Planning and Development District and the North Delta Regional Planning & Development District, Louisiana, USA. 10.13140/RG.2.1.2639.5282.

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- 3) **Emerging Clusters:** Industries that have a smaller local concentration ($LQ < 1.0$) but have seen positive employment growth recently. Although these industries may not have been as important in the regional economy, there is strong potential for growth and could be main drivers of the regional economy in the foreseeable future.
- 4) **Declining Clusters:** Industries that have a smaller local concentration ($LQ < 1.0$) as well as negative employment growth. These industries are shrinking and have little competitive advantage in the region.

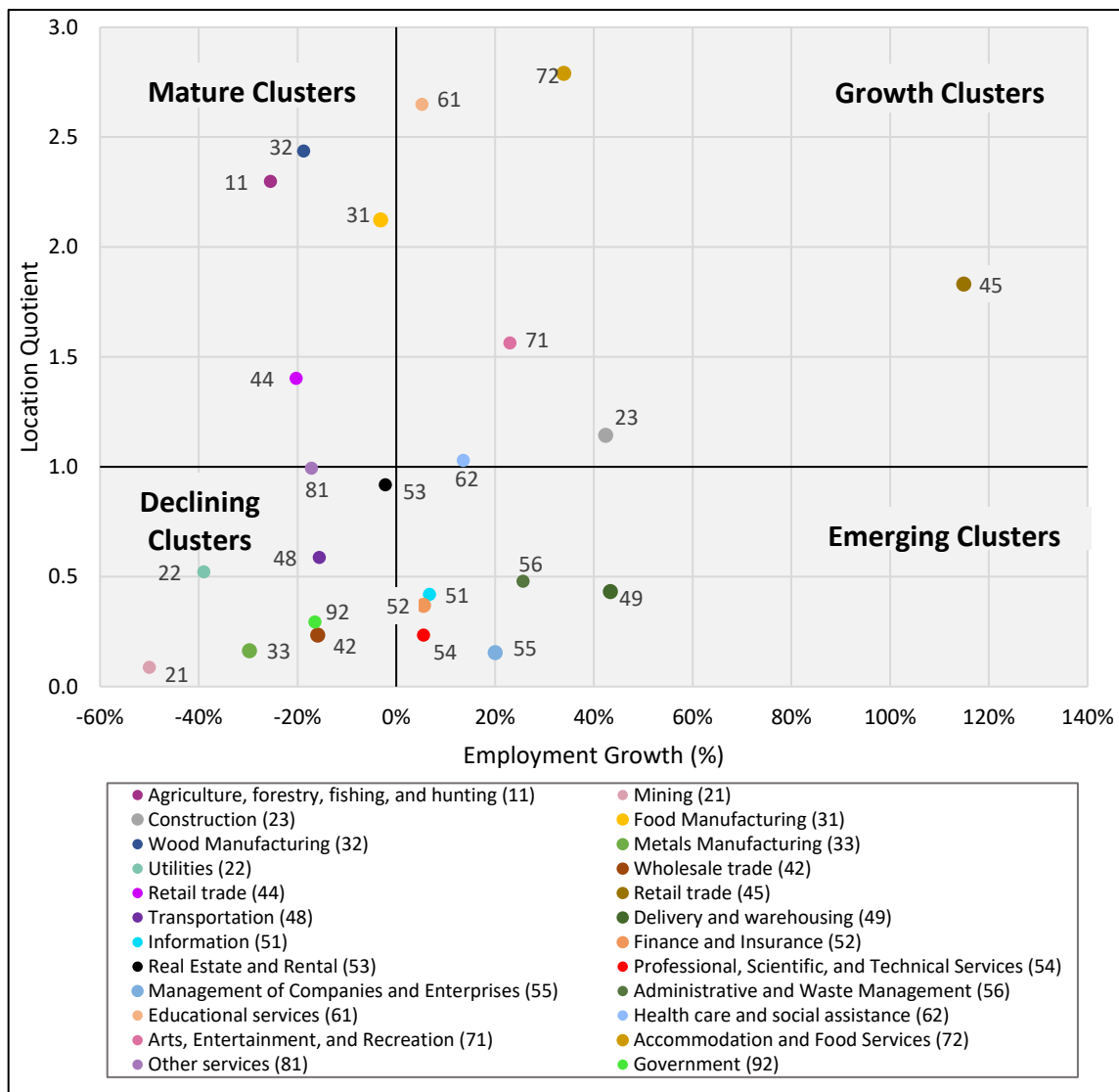
Figures 4.2 and 4.3 below depict this relationship in Clatsop County during the 2012 – 2022 and 2017 – 2022 timeframes. In the last decade, there has been an even split of the County’s industries that experienced positive or negative employment growth, while most of these industries are underrepresented when compared to national levels. Much like what has been observed, industries that are associated with tourism make up most of the growth cluster. In the growth cluster, the accommodation and food services industry (NAICS 72) displayed the highest employment concentration in the county as compared to national levels, while the retail trade industry (NAICS 45) experienced the greatest growth, increasing by roughly 115% in the last 10 years. Other notable industries in the growth sector are the educational services and arts, entertainment, and recreation industries, both of which displayed high location quotients as well as positive employment growth, albeit below 20%. This further corroborates the notion that the tourism industry has been one of the county’s main economic drivers in the past decade. These industries can be expected to show strong growth and competitiveness into the foreseeable future.

On the other hand, industries in the emerging cluster are mostly comprised of industries that can be considered “office-work”-based such as the management (NAICS 55-56), finance and insurance (NAICS 52), as well as the “professional, technical, and scientific services” (NAICS 54) industries. This could be due to the recent shift towards working from home since 2020. This is a trend observed nationally as more and more office spaces in urban areas were left empty. This trend, however, appears to be reversing, with many levels of government and private companies shifting towards a hybrid or fully in-office work week. For those employees who continue to work remotely, it is reasonable to believe that Clatsop County will continue to absorb a portion of the remote workers from the Portland Metro Area (PMA). This absorption rate may be due to the fact that office workers want to enjoy relatively lower living costs and the recreational opportunities in Clatsop County while earning a higher income from employment in the PMA.

The mature and declining clusters, which are comprised of industries whose employment base shrank, is predominantly made up of industries related to manufacturing (NAICS 31-33) and natural resources (NAICS 11 & 21). These industries are either shrinking economic drivers in the region, or industries that have had a lesser role in the county’s economy in recent history.

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Figure 4.2. Location Quotient and Employment Growth Relationship, Clatsop County (2012-2022)*



*The unclassified sector (NAICS 99) was left out due to having an employment base of less than 10.
Sources: Oregon Employment Department, Bureau of Labor Statistics, Johnson Economics

Figure 4.3 below depicts the location quotient analysis done for the county during the 2017 – 2022 period. Although industries in the growth and mature clusters remained similar, many of the county’s industries experienced negative employment growth, most likely indicating the employment base’s slow recovery following the onset of the COVID pandemic. Despite this, most of the industries in the mature and growth clusters remained the same with the accommodation & food services (NAICS 72) and retail trade (NAICS 45) industries still dominating the growth cluster. Some notable shifts were the educational services industry’s (NAICS 61) and arts, entertainment, and recreation shifting into the mature cluster due to a decrease in their employment base in the last 5 years. On the other hand, food manufacturing (NAICS 31) has seen accelerated employment growth, earning it a place in the growth cluster.

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Figure 4.3. Location Quotient and Employment Growth Relationship, Clatsop County (2017 – 2022)*



*The unclassified sector (NAICS 99) was left out due to having an employment base of less than 10.

Sources: Oregon Employment Department, Bureau of Labor Statistics, Johnson Economics

Many industries in the county experienced negative employment growth in the last five years, especially amongst industries who have a weaker concentration as compared to its natural counterpart. As a result, over 12 of the county’s industries fell into the declining cluster, as compared to eight during the 2012-2022 period. This suggests that the county’s economy has been largely driven by only a few key industries in the last five years. This trend may be reversed somewhat based upon information in the 2023 and 2024 employment growth figures from the Oregon Employment Department.

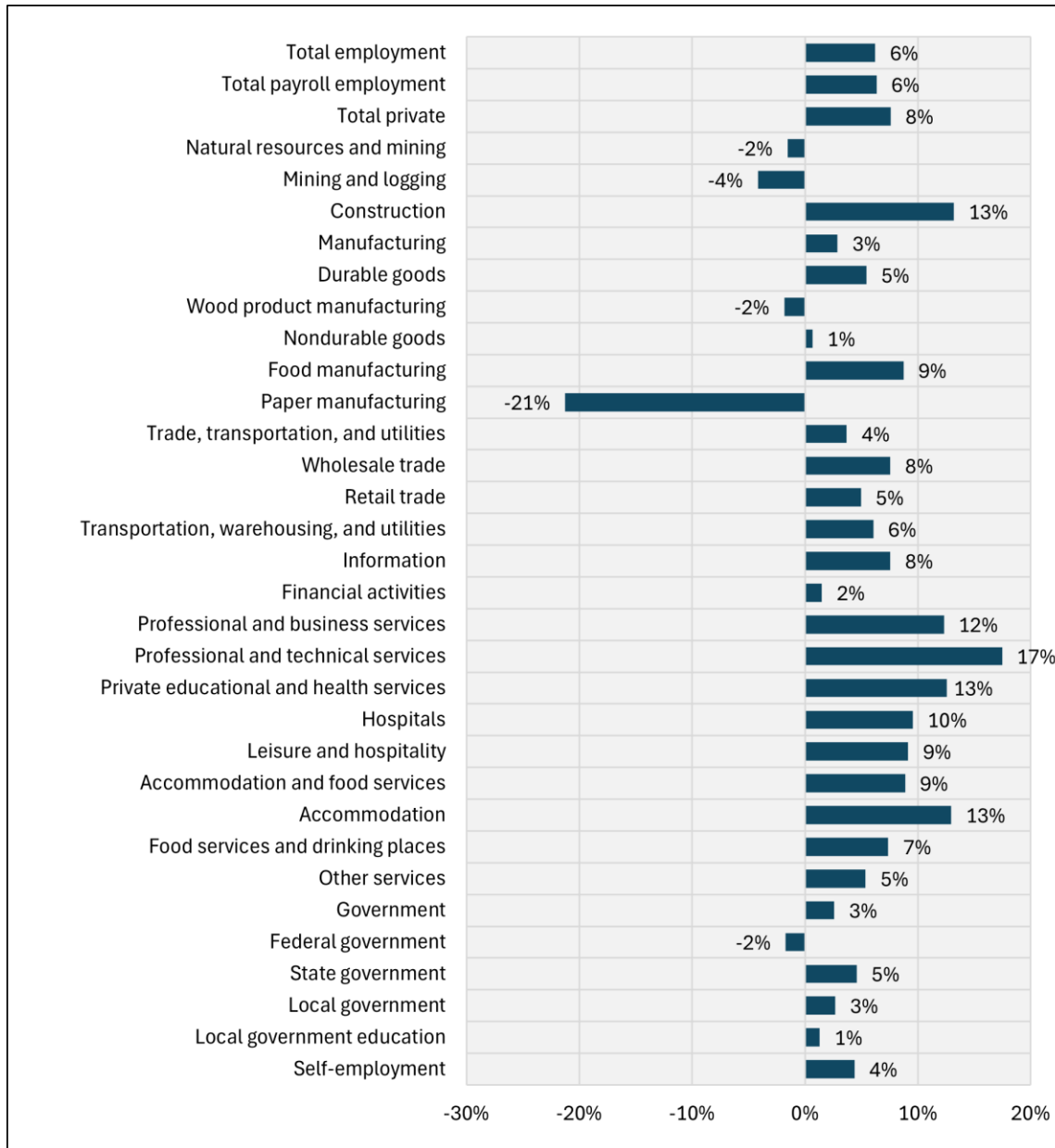
Projected Employment Growth

The State of Oregon produces employment forecasts by sector at the broader regional level, which groups Benton, Clatsop, Columbia, Lincoln, and Tillamook counties together into one

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Northwest Oregon region. The most recent forecast (2023-2033) anticipates a gain of roughly 6,990 jobs through the forecast period, reflecting an estimated 10-year growth employment increase of 6%. This is slightly lower than the anticipated statewide employment growth rate of 8%.

Figure 4.4. Projected Employment Growth by Sector, Columbia Basin Counties (2022 – 2032)



Source: Oregon Employment Department, Workforce and Economic Research Division

Within this broader region, the major industries with the fastest growth rates are projected to be professional and technical services (17%), accommodation (13%), private educational and health services (13%), construction (13%), and professional and business services (12%). Paper product manufacturing is projected to experience the largest negative growth in the coming

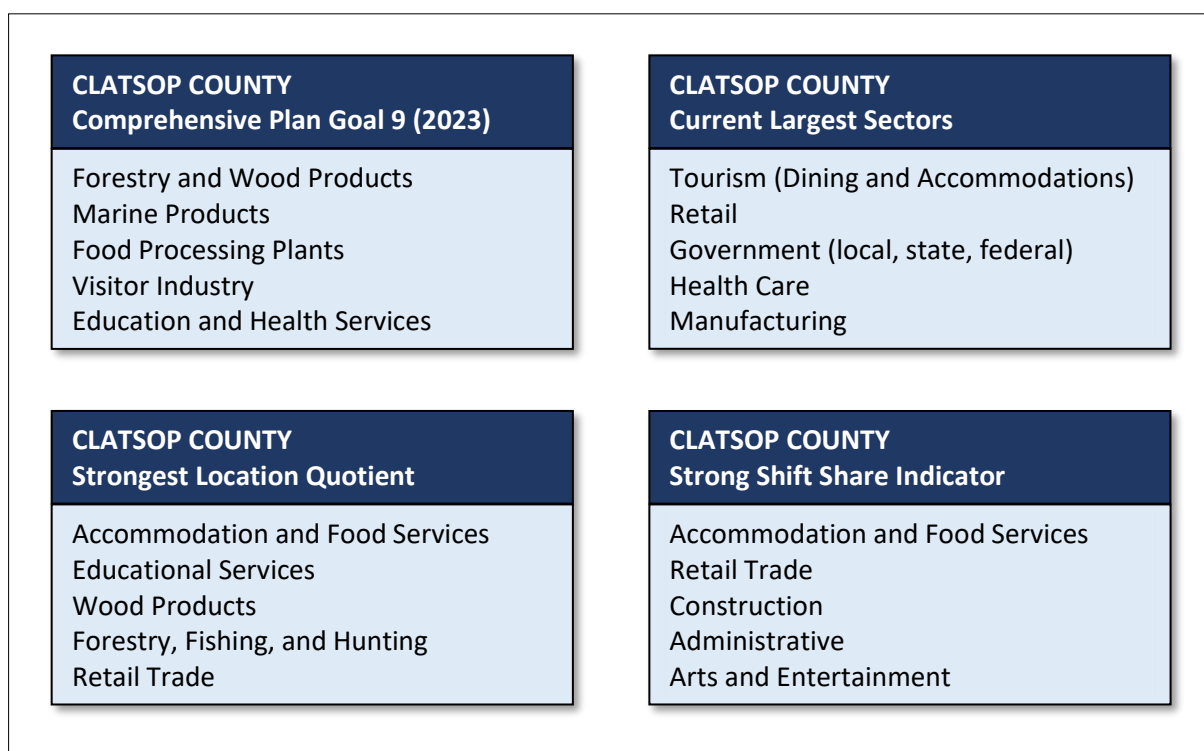
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years, declining by 21%. Other industries in the region expected to shrink in the next decade are mining and logging (4%) and wood product manufacturing (2%). Many of these declining industries are prevalent in Clatsop County, while many of those project to grow, such as professional services are underrepresented in the county.

Clatsop County Target Industries Analysis

The preceding analysis provides a basis for narrowing the target industries for Clatsop County. These indicators point to sectors of past and potential growth, as well as a locally expressed economic development vision for the community. The following is a summary of the industry indicators for Clatsop County, discussed in the prior sections of this report.

Figure 4.5. Clatsop County Targets and Indicators



Source: Johnson Economics

These broader analyses arrived at similar conclusions on what have traditionally been the strongest industries in Clatsop County, including tourism, forestry, fishing and maritime, wood product manufacturing, and retail.

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Clatsop County Target Growth Sectors

The preceding analysis of industry strengths and regional priorities provided a foundation for the discussion of local target growth sectors for Clatsop County. Through the EOA planning process, the technical advisory committee of local stakeholders reviewed the economic goals, priorities, and prior plans, and identified the following list of four growth sectors to help meet the community’s economic development goals. This proposed path to economic diversification and enhancement is not meant to move away from the county’s historic strengths, but rather, it is meant to capitalize on existing assets and to move them into the next phase of the economy. The identified sectors, which encompass many different sub-occupations and professions, are discussed in further detail below.

BLUE MARINE ECONOMY INDUSTRIES

- Marine construction and repair
- Marine transport facilities
- Food processing
- Research and innovation centers for fisheries, environmental protection, business entrepreneurship
- Environmental tourism

Blue Marine Economy Sector

Oregon State University recently analyzed the growth potential of the Ocean Resources and Blue Economy for the State of Oregon. The 2023 report defines Oregon’s Blue Economy as, “...many sustainable economic activities, innovations, and emerging markets that depend on the ocean, shoreline, and estuaries directly along the Oregon Coast. The Blue Economy also includes activities that are geographically and economically linked to the ocean, coastal, and estuarine businesses and industries, such as transport of goods, entrepreneurship, and advanced manufacturing occurring in

interconnected riverine systems and ports. Industries within Oregon’s Blue Economy – such as aquaculture, energy, fishing, food production and processing, research and development, marine transportation, and tourism – emphasize ocean stewardship and diverse economic benefits to coastal communities.” The study estimated that in 2019 30.9% of Clatsop County’s employment was tied to the “ocean economy”, with 5,490 workers earning approximately \$155.2 million (Figure 4.6).

Figure 4.6. Oregon Ocean Economy by County (2019)

County	Ocean Establishments	Ocean Employment	Ocean Wages (millions)	Ocean GDP (millions)	Total County Employment	% Ocean Employment
Clatsop	337	5,490	\$155.2	\$331.8	17,762	30.9%
Columbia	93	1,370	\$32.2	\$64.1	22,601	6.1%
Coos	230	3,491	\$105.9	\$222.2	25,028	13.9%
Curry	147	147	\$28.1	\$56.7	7,617	17.1%
Coastal Douglas	48	658	\$25.3	\$49.7	2,158	30.5%
Coastal Lane	113	1,366	\$41.9	\$88.0	5,372	25.4%
Lincoln	385	5,117	\$137.1	\$300	19,011	26.9%
Multnomah	871	20,778	\$798.6	\$1,341.7	452,939	4.6%
Tillamook	1280	1,385	\$37.3	\$79.6	10,307	13.4%

Sources: National Oceanic and Atmospheric Administration (2022); U.S. Census Bureau. Values are in 2019 dollars.

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Clatsop County is uniquely positioned to capitalize on the Blue Marine Economy due to its location and its historic reliance on fisheries as one of its “Big Three” economic sectors. While the fisheries sector, which is discussed in more detail in Section 3, is the obvious industry that springs to mind, there is not one specific type of business that defines the Blue Marine economy. It is all businesses that gain from a location near or on the water (rivers, lakes, or oceans). The key characteristics that define a Blue Marine economy business are location and the desire to innovate. Clatsop County’s location, where the most important river in the Pacific Northwest meets the world’s largest ocean, certainly meets the key geographical characteristic. Additionally, the county’s strong tradition of resource and recreation-based industries, as well as the presence of research and educational institutions makes this an excellent place for a Blue Marine economy.

Clatsop County residents have looked to the water for economic opportunities for generations. Fisheries, marine transport, and recreation are all part of the traditional resource sectors. Historically, even the timber industry used the water for transportation and locations for production facilities, such as Bradwood. Recreation in Clatsop County is often centered on access to water. Continued upgrades to existing water-dependent businesses have resulted in millions of dollars of investment and dozens of new living wage jobs within Clatsop County. Examples include Georgia Pacific which, as the largest employer in the County, announced in 2024 that it would be investing \$150 million to rebuild its 1965 paper machine. Business Oregon awarded Teevin Bros. \$400,000 in 2019 to repair its dock and to dredge the adjacent Westport Slough. The entire project cost was \$1.5 million and was expected to create 27 jobs in the community with an average salary of \$70,000 per year. These commitments support the County’s history of working waterfronts and waterways.

In 2022, the Oregon Legislature approved \$7 million in funding for Hyak Maritime’s boat lift project at Tongue Point. The lift, which is expected to cost \$35 million, would be the first zero-emission electric mobile lift operating in the United States. The mobile lift is able to hoist vessels weighing up to 1,500 tons, allowing it to service boats that would otherwise need to travel out of state or get on a waitlist for repairs at a Portland dry-dock. An independent economic impact study conducted by the Columbia-Pacific Economic Development District (Col-Pac), estimated that the lift would generate 51 full-time jobs, with an average salary of around \$78,000. The study also projected that the lift would create an additional 50 jobs five years after its installation, for a total of 100 new full-time positions. Col-Pac further projected that installation of the lift would add \$400,000 in annual local and state tax revenue by 2025, and \$700,000 annually by 2030. In 2022, the County, the cities of Astoria and Warrenton, and the Port of Astoria, approved a 15-year Long-Term Rural Enterprise Zone abatement agreement with WCT Marine & Construction Inc., which would develop and operate the lift and the facility at Tongue Point.

The Port of Astoria, established in 1910, owns and manages both the Warrenton-Astoria Regional Airport and three deep-draft marine terminals (Piers 1, 2 and 3) at the west end of Astoria. Pier 1 supports multiple industries, including acting as a cruise ship berth and stopping point for U.S. Navy, Coast Guard and Army Corps vessels. Pier 2 is home to three seafood

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processors and provides commercial fishing fleet support via fish off-loading and fish net haul-out areas. Pier 2 serves the bulk of the commercial fishing needs of Port users with its 71,800 square foot multi-tenant building. Up to three new multi-tenant industrial buildings are envisioned as part of the Port's Central Waterfront Master Plan. Pier 2 is also home to the Oregon Responder, an oil spill response vessel owned by Marine Spill Response Corporation. Pier 3 includes the Port's haul-out facility and boatyard, which includes an 88-ton TravelLift®, wash down system and an on-site marine repair business. According to information on the Port's website, there are 925 jobs that exist on properties owned and managed by the Port of Astoria. In 2022, the Port and the City of Astoria adopted the Astoria Waterfront Master Plan, laying the groundwork for the redevelopment of the waterfront. In December 2024, the Port issued a Request for Expressions of Interest to invite developers interested in creating a mixed-used development that would feature hotels, retail spaces, marine-related businesses and restaurants.

The United States Coast Guard (USCG) is also a major contributor to the County's existing Blue Marine Economy. District 13 Columbia River Sector is charged with patrolling shorelines, waterways, and harbors within the states of Oregon, Washington, Idaho, and Montana. In 2022, the USCG applied to construct new facilities and upgrade existing infrastructure to support homeporting of Fast Response Cutters at East Tongue Point at a location formerly used as a naval base during World War II. Coast Guard Air Station Astoria was established on August 14, 1964. In 2021 (the last year for which information could be found), the unit housed 450 active duty, 80 reserve duty, 25 civilian and 270 auxiliary members. In 2003, the Air Station's payroll was \$2,010,000. While no recent data could be found to quantify the local economic impact of these personnel, the Coast Guard's presence cannot be discounted as an important fiscal piece of Clatsop County's marine economy.

Other entities such as the Columbia River Bar Pilots organization also contribute to the economic opportunities in the Blue Marine Economy. Additionally, the Oregon Coast Visitors Association (OCVA) is currently studying the food and tourism economies. Recent studies such as "Bringing Opportunity to the Oregon's Coast: Supporting strategic, sustainable, and long-term success of the seafood economy along Oregon's coast through educational initiatives and workforce development" highlight the potential growth in the marine-based economy.

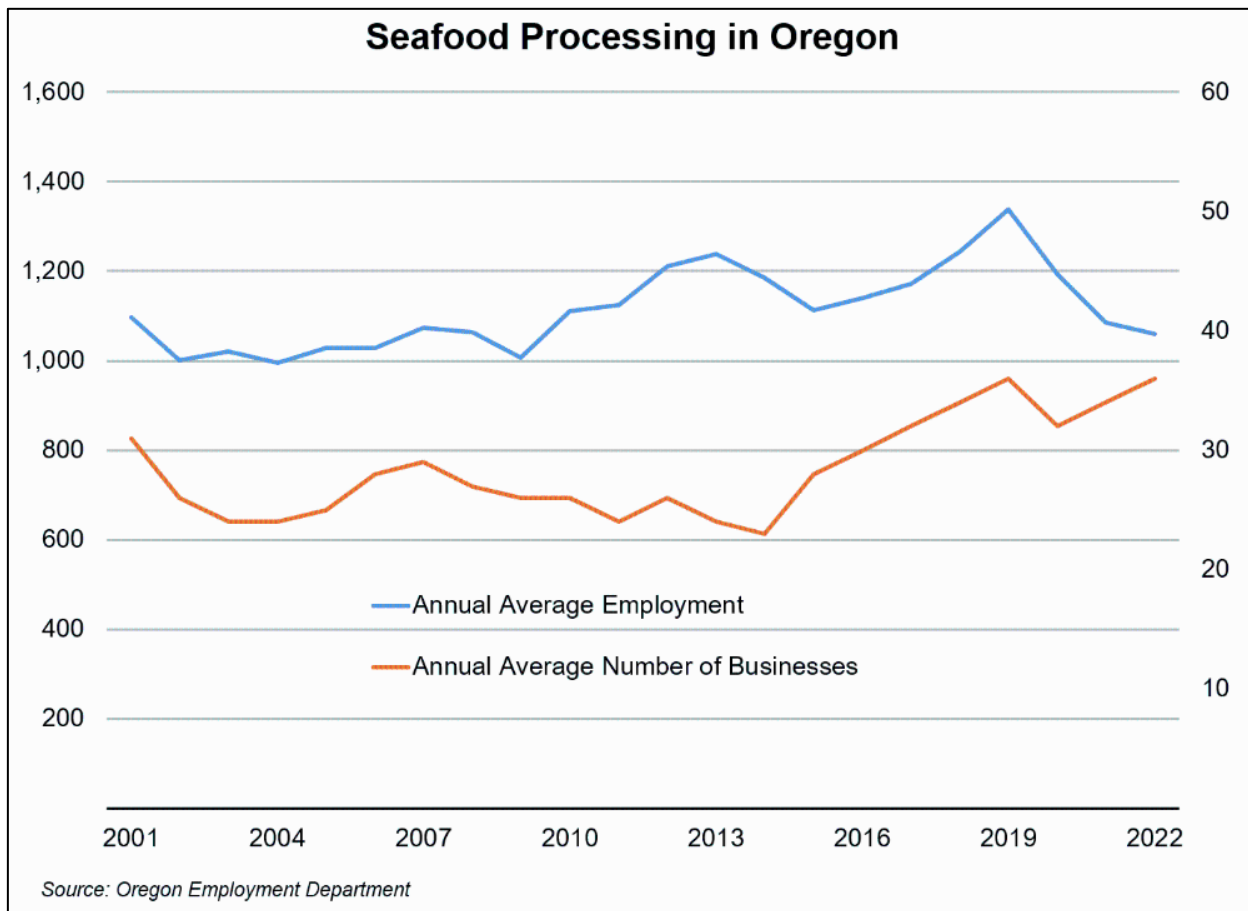
Seafood processing historically has played a significant role in Clatsop County's economy, beginning with the early canneries that were located throughout Astoria and along the Columbia River Estuary. Seafood processing, which is considered part of the manufacturing sector, includes businesses that clean, freeze, can, smoke, salt and dry seafood. It also includes firms that shuck and pack shellfish. In September 2023, the Oregon Employment Department reported that the state had 36 employers and 1,060 employees focused solely on packaging fish and seafood for cooking and eating (Figure 4.7).

With certain exceptions, the Oregon Department of Fish and Wildlife requires commercial fishers to sell their harvest to licensed wholesale fish dealers or licensed fish buyers, many of whom are also processors. A 2019 study by OCVA estimated that over 90% of seafood sold in

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restaurants, food stores, and institutions within the state is sourced from other distant domestic and international markets. OCVA concludes that this is a significant contributor to an estimated \$252 million that is immediately lost to economic leakage annually.

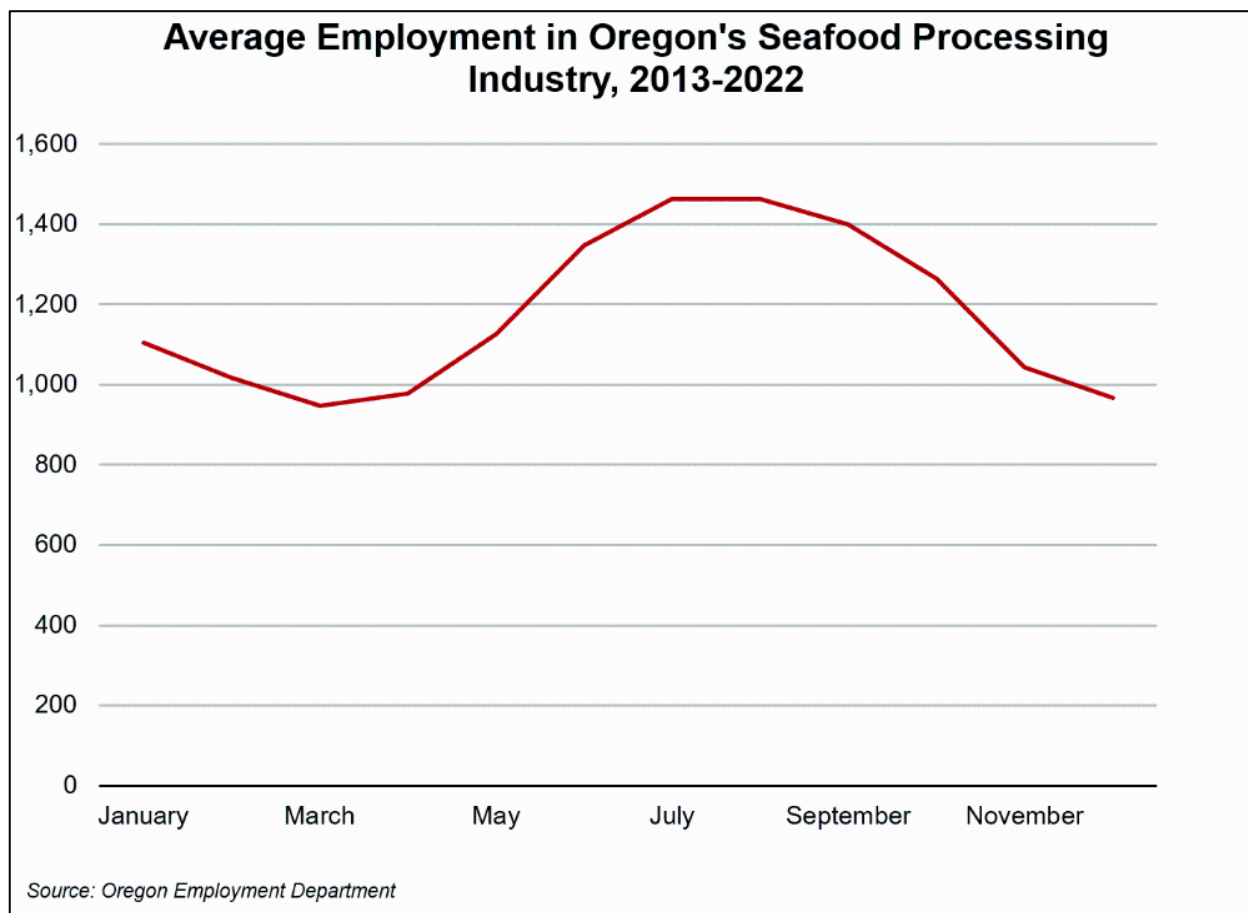
Figure 4.7. Seafood Processing in Oregon (2001-2022)



OED stated that while the number of employees was slightly lower than in previous years, employment in the seafood processing industry has remained relatively steady since 2017. Processing jobs peaked in 2019 with 1,338 employees. The COVID pandemic caused significant impacts on seafood processors, with some facilities closing temporarily due to COVID outbreaks. OED also reported that while the number of seafood processing operations has been declining since 2007, that trend began reversing in 2015, when five new processing businesses opened. Overall, since 2014, Oregon has added 13 new seafood processing operations around the state.

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Figure 4.8. Average Employment in Oregon's Seafood Processing Industry (2013-2022)



While economic data suggests that seafood processing may be a potential growth sector industry for Clatsop County, there are significant regulatory challenges facing the industry that threaten to curtail or reverse its growth. These regulatory barriers will be discussed in greater detail in the “Challenges” portion of this section.

Education and research facilities are incubators for innovation and employee development. The Oregon State University Seafood Research and Education Center is part of the Coastal Marine Experiment Station and is part of the OSU’s Department of Food Science and Technology. The mission of the OSU Seafood Lab is to improve seafood through research and development, extension services to the fishing and seafood processing industries and to provide graduate student research, training and instruction. Additionally, Clatsop Community College’s Marine and Environmental Research and Training Station (MERTS) campus provides a wide range of marine-related training, associate degrees, and certificate programs. The community also benefits from the Tongue Point Job Corps Center through its wide variety of skill-based and construction training programs and the seamanship training programs. Each organization together creates a broad foundation of training opportunities that can be expanded to meet the needs of future growth sectors, including the Blue Marine economy.

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A recent development in the Blue Marine Economy sector is the establishment of blue economy business incubators. This initiative leverages a productive partnership between educational institutions and marine-oriented businesses to foster innovative economic opportunities. The Blue Economy Incubator is a program designed to support the development and growth of businesses and ventures that operate within the blue economy, which emphasizes the sustainable utilization of ocean resources for economic advancement, enhanced livelihoods, and the health of marine ecosystems. Partnerships of this nature have been formed between ports and local educational institutions, spanning from San Diego, California to Seattle, Washington.

For example, the Port of San Diego plays a key role in coordinating an initiative known as “Blue Tech Bay.” As detailed in the Blue Economy Incubator Highlights, Fifth Edition, “A core element of the Port’s commitment to promote the development of a sustainable ocean economy is the creation of its Blue Economy Incubator (BEI), which serves as a launch pad for Port-related sustainable aquaculture and blue technology ventures. Established in 2016, the BEI was designed to remove barriers to early-stage companies and provide pilot project facilitation services including funding, key assets and support services, and permitting assistance. Through its BEI the Port is building a portfolio of new businesses and partnerships that deliver multiple social, environmental, and economic co-benefits to the Port and the region.” This commitment led the Port to provide funding, port-based pilot sites, regulatory and permitting assistance, and subject matter expertise, among other support mechanisms.

The efforts of the Port of San Diego have had a considerable positive impact. Since its inception, the Blue Economy Incubator has secured \$2.5 million in research and development funds for BEI companies, leveraged \$5.4 million in investments for these companies, and facilitated the establishment of over 30 public-private partnerships through the BEI strategy.

Clatsop County possesses several essential elements for establishing a Blue Economy Incubator, including the Port of Astoria, Oregon Coast Visitors Association, Tongue Point Jobs Corps, Clatsop Community College, the Marine and Environmental Research and Training Station (MERTS), and the Oregon State University Seafood Research and Education Center. Each of these partners has the potential to contribute significantly to the creation of new and innovative economic opportunities. Similar efforts are underway in Lincoln County, Oregon where Business Lincoln County, local educators, and researchers have partnered with the OSU Hatfield Marine Sciences Center to promote opportunities for students and entrepreneurs to work together to enhance the local Blue Marine economy and environmental health of the Pacific Coast.

Tourism and recreation are also considered part of the Blue Marine Economy Sector. From Fort Stevens State Park, the State’s largest publicly owned campground, to the sandy beaches along the Pacific Ocean, to the Twilight Eagle Sanctuary along the Columbia River, water has drawn visitors for generations. A report commissioned by Travel Oregon released in April 2024,

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estimated that visitors to Clatsop County in 2023 spent \$580.6 million, supporting 7,170 jobs with total earnings of \$263.2 million.

Cruise ships, which dock at facilities owned and maintained by the Port of Astoria, are also contributors to the blue marine economy. In 2025, the Port of Astoria is scheduled to host 15 cruise ships and 18 riverboats between April 1st and October 31st. The Port estimates that each of the cruise ships directly brings in \$180,000 per day with a total economic impact of approximately \$240,000 per day.

Figure 4.9. Clatsop County Direct Travel Impacts

Clatsop County / Summary Trend											Avg. Annual % Chg.	
Direct Travel Impacts, 2003-2023p											2022-23	2003-23*
	2003	2015	2016	2017	2018	2019	2020	2021	2022	2023		
Spending (\$Millions)												
Total	317.6	539.1	550.6	561.1	582.9	601.3	482.0	499.2	568.7	580.6	▲ 2.1%	▲ 3.1%
Other	10.6	5.8	4.5	5.0	5.8	5.9	2.8	5.3	7.3	6.7	▼ -7.9%	▼ -2.3%
Visitor	307.0	533.3	546.1	556.1	577.2	595.5	479.3	493.9	561.4	573.9	▲ 2.2%	▲ 3.2%
Earnings (\$Millions)												
Earnings	92.1	156.8	164.4	177.7	203.0	215.7	185.8	205.7	241.2	263.2	▲ 9.1%	▲ 5.4%
Employment (Jobs)												
Employment	4,760	5,800	5,990	6,210	6,620	6,830	5,790	6,230	6,960	7,170	▲ 2.9%	▲ 2.1%
Tax Revenue (\$Millions)												
Total	12.0	23.7	24.5	27.0	28.8	29.6	30.3	28.6	31.2	32.1	▲ 3.0%	▲ 5.1%
Local	4.9	10.5	10.7	11.1	11.5	11.6	14.4	12.4	12.8	12.8	▼ -0.2%	▲ 4.9%
State	7.1	13.2	13.8	15.9	17.3	18.0	15.9	16.3	18.3	19.3	▲ 5.3%	▲ 5.1%

Notes: House Bill 2267 established Travel Oregon in 2003; we include this year to track the long-term growth of the industry. Calendar year 2021 and 2022 has been revised with the release of this report. The category "Other" represents a portion of resident spending on air travel to leave Oregon and travel arrangement activity. Local taxes include lodging tax (TLT), food and beverage tax (where applicable), auto-rental tax (where applicable), and airport facility charges (where applicable). State taxes include lodging tax (TLT), personal & business income tax, and motor fuel excise taxes. *Compound Annual Growth Rate (Ending Value / Starting Value)^(1/(Number of Periods))-1.

Source: Travel Oregon

As noted elsewhere in this report, however, the salaries typically paid for positions in the leisure and hospitality industry are generally not at a level that would be considered "living wage". As detailed by the Oregon Employment Department in March 2024, only 7% of leisure and hospitality jobs are high wage, paying between \$30-\$39.99 per hour.

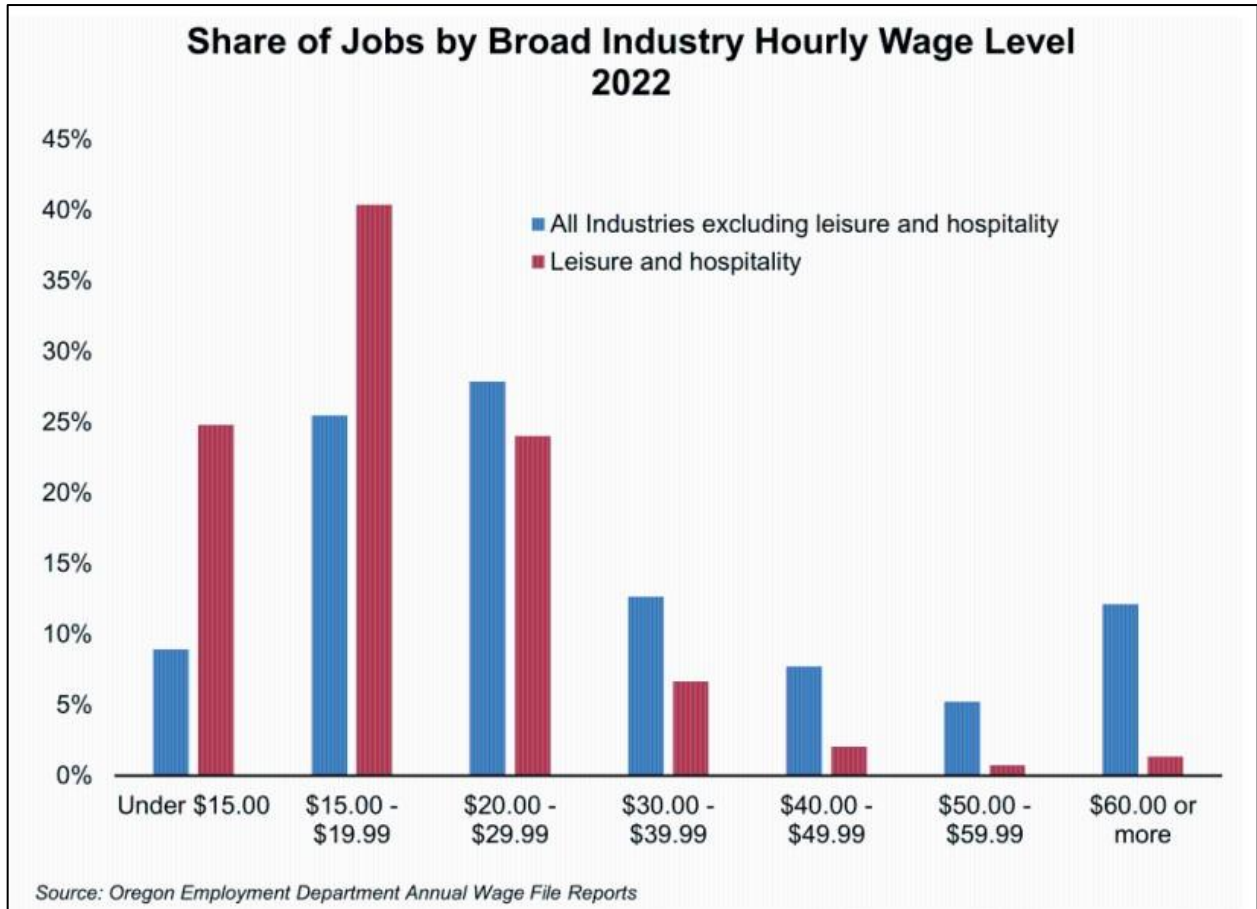
Although it is one of the fastest growing industries, tourism also has impacts on infrastructure and stresses public services such as fire and law enforcement. Those impacts are borne by the residents of the County, many of whom are employed in the same tourism industry.

The Blue Marine economy can be tailor-made for each place. Ports and communities along the Pacific Coast are investing in collaboration between research and education institutions and the business community. Similar research collaboration between education and business in Iceland has returned significant returns to the small coastal communities. A Clatsop-county sized

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version of the concept could add value to the economy. The Blue Marine economy does not need to include uses that the local economy would not support or industries that would have a net negative impact on the quality of life for the area.

Figure 4.10. Share of Jobs by Broad Industry Hourly Wage Level (2022)



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HEALTHCARE AND WELLNESS INDUSTRIES

- Expanded medical services provided through the two independent medical groups
- Increased ancillary medical businesses
- Expanded long-term care and specialty residential facilities
- Non-traditional wellness businesses
- Regional healthcare hub
- Expanded community health programs

Healthcare and Wellness Sector

Clatsop County is unique in that it is a rural county served by two well-established health care systems. Both Columbia Memorial Hospital (CMH) in Astoria and Providence Seaside Hospital in Seaside provide a wide range of medical services in Clatsop County. Perhaps equally important, these institutions provide connections to larger facilities in the region. Both systems currently operate 25-bed hospitals with associated clinics and specialty services.

CMH, which also operates clinics in Astoria, Warrenton and Seaside, is undertaking a \$300 million expansion project that will include the construction of 180,000 square feet of building space, expansion of the emergency department and would add additional operating rooms. Additional increased service offerings would include robotic surgery; increased mammography services; dedicated interventional radiology suite; additional telemedicine services with OHSU; and increased access to advanced imaging with new CT, MRI and PET CT machines.

A \$20 million grant from FEMA would have allowed the new building to also serve as a tsunami evacuation tower. However, as of April 2025, the Building Resilient Infrastructure and Communities (BRIC) grant from FEMA has been canceled, necessitating CMH to seek alternative funding sources for the resiliency components of the project.

Providence Medical Group also offers clinics and specialty services in Cannon Beach, and Astoria, and is currently expanding service offerings at its Warrenton location. The 11,000 square foot expanded space will offer:

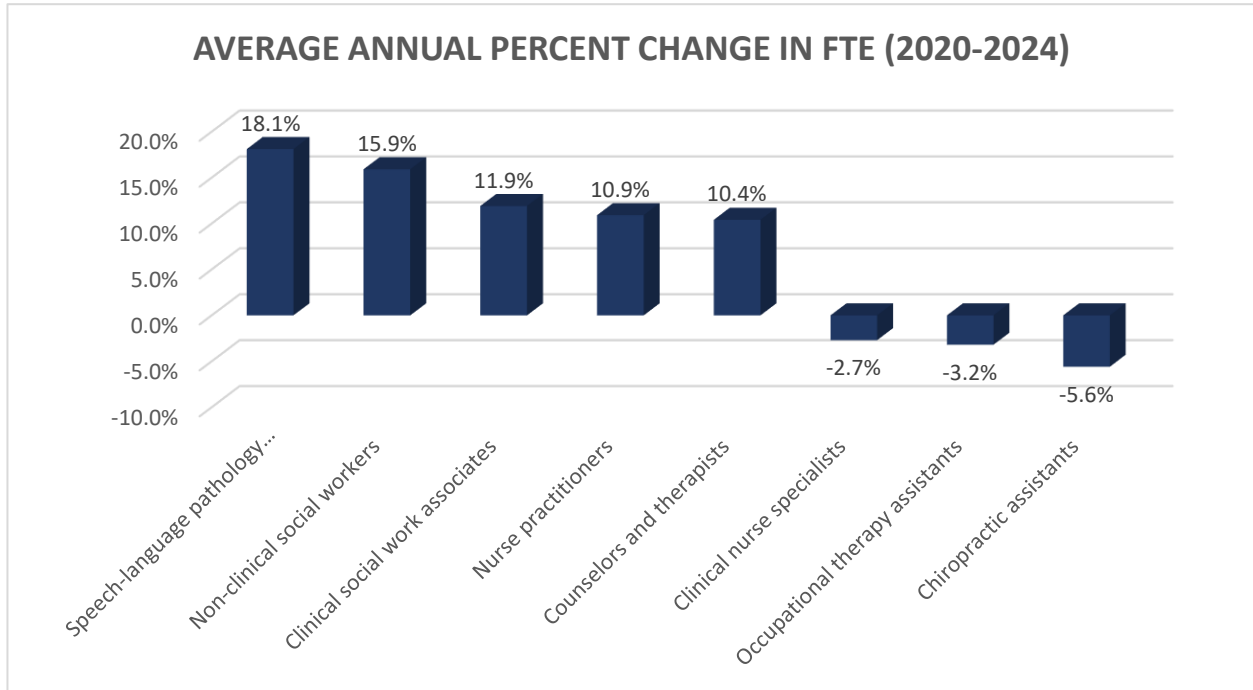
- Primary care
- Cardiology
- Walk-in clinic
- Diagnostic imaging
- Echocardiology
- General surgery
- Orthopedic surgery

Numerous independent medical businesses that support these facilities are also located in Clatsop County, including oral health, maternal and child health, pediatric care, geriatric care, independent health care operators, long-term care and specialized care facilities in Seaside, Warrenton, and Astoria. Clatsop County's Public Health Department is charged with assuring the health status of the County. The public health system provides access to public health

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services to promote health and to protect against diseases. Services include epidemiology and control of preventable diseases and disorders; parent and child health services, including family planning services; collection and reporting of health statistics; and provision of health information and referral services.

Figure 4.11. Average Annual Percent Change in Healthcare FTE (2020-2024)



Source: Oregon Health Authority/Oregon Healthcare Workforce Reporting

In November 2024, the Oregon Health Authority (OHA) and the Oregon Health Care Workforce Reporting Program (HWRP), released “Oregon’s Licensed Health Care Workforce Supply, 2024”. The report states that 11% of Oregon’s workforce are employed as either health care professionals or within a health system. The study also concluded that the health care sector is the largest employer in the United States and employment in health care occupations is expected to increase faster than the average of all occupations from 2022 to 2032.

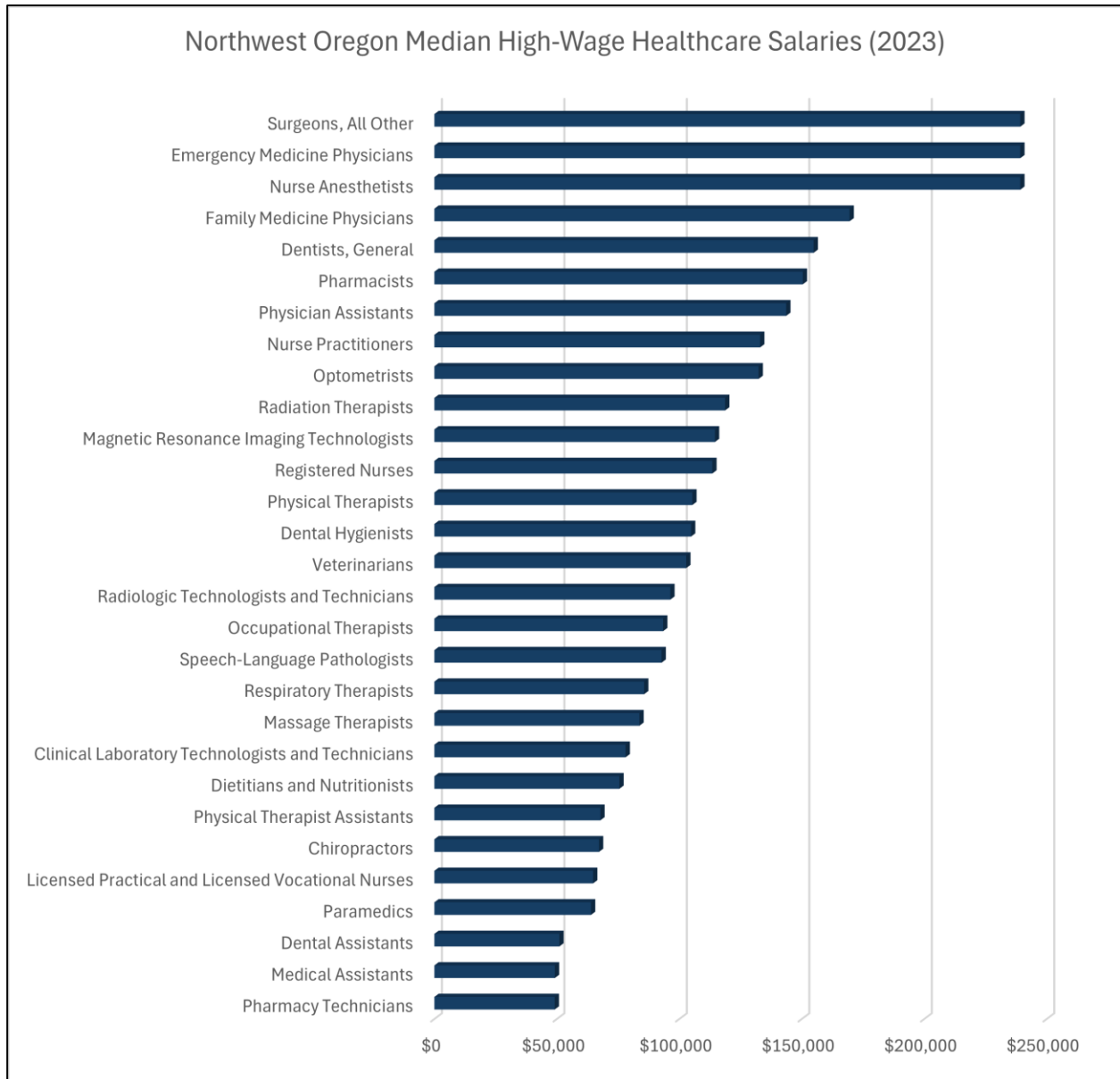
Statewide, the Oregon Employment Department projects significant growth in healthcare employment in northwest Oregon over the next ten years. As shown on Figure 4.11, while employment in direct patient care is generally increasing, some licensed health care occupations are declining. Additionally, as shown in Figure 4.12, many occupations associated with the healthcare sector fall within the “high-wage” or “living wager” range.

Behavioral and mental health is also an integral part of the health care system. Statewide, behavioral health employs more than 16,500 workers. In Clatsop County, Clatsop Behavioral Healthcare (CBH) provides mental health services for the community. In January 2025, CBH broke ground on a new housing development that will provide 32 supportive housing units,

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which will also include treatment and employment services for residents.

Figure 4.12. Northwest Oregon Median High-Wage Healthcare Salaries (2023)



Source: Oregon Employment Department

The general aging population and the increased in-migration of retired people will create a greater need for specific types of health care services. Additionally, the OHA/HWRP study documents that just over half of the adult population within the state has at least one chronic condition such as diabetes, arthritis, or heart disease. Information from the Rural Health Information Hub, which is funded by the U.S. Health Resources & Services Administration, notes that rural communities often have fewer resources to prevent and treat chronic diseases and conditions than urban communities, while facing higher rates of multiple chronic conditions. These factors, combined with increased rates of substance use disorder and increases in mental

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health needs, demonstrate that there is a significant need for investment in continued expansion of health care offerings within Clatsop County.



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CONSTRUCTION AND RESOURCE INDUSTRIES

- Timber harvesting
- Lumber and building supply businesses
- Mass timber fabrication and construction
- Specialty wood products for historic homes, local artisans, and export
- Expanded training and apprenticeship programs for construction sector employees
- Construction business incubator and entrepreneurship programs

Construction and Resource Industries Sector

Approximately 80% of the land within Clatsop County is designated and zoned as forest lands. This also includes much of the area comprising the Clatsop State Forest. Any discussion about the County's economic future must consider both the challenges and opportunities currently facing this historically vital section of the economy.

Resource industries, however, are more than just the harvesting of timber, although the timber industry has consistently played an integral role in the economy of Clatsop County. Forestry-related employment in Clatsop County encompasses a variety of occupations and businesses tied to transportation, processing and milling, as well as paper manufacturing. Additionally, there is a close relationship between natural resources and the construction industry. For example, not only can lumber milled from local forests support needed housing construction, but rock quarried within the County can support the road construction that provides access to those homes.

The proposed Habitat Conservation Plan (HCP) currently under review would have a large and significant ripple effect throughout the County. If adopted as proposed the plan would reduce timber harvests on state-managed land, impacting thousands of acres of forestland in Clatsop County. The potential decrease of 35% in timber revenues would significantly affect local government entities that rely on these funds to support public safety, general government operations, school districts, and public works. In addition to the immediate impact on direct logging occupations, multiple supporting industries such as log truck companies, mills and wood processing plants would feel the impacts from enforcement of the HCP.

Identifying supporting industries that can assist Clatsop County in meeting its dual challenges of increasing housing production, while offsetting potential job losses caused by implementation of the HCP will be crucial to the County over the planning period. The background report for the County's 2023 adoption of updates to Goal 10: Housing, recognized the potential for mass timber production and construction. The report states:

Emerging industries such as mass timber and mass plywood have the potential to further the economic development policies in Goal 9, while supplying a sustainable source of construction materials for single- and multi-family housing. An October 2020 article published by Adam Scouse, Stephen S. Kelley, Shaobo Liang and Richard Bergman in *Sustainable Cities and Society*, Volume 61, found

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that the impact assessment results indicated that construction of the 12-story building using a mass timber design generated larger economic impacts than traditional concrete frame construction and generated additional earnings for households at all income levels. Panels must be produced locally to realize the full economic benefits of mass timber construction as importing panels from outside the state creates economic leakage that reduces economic benefits. Congregating production facilities in standard, densely populated urban industrial areas in the state also negates economic benefits that could be obtained in rural counties if facilities were distributed geographically and demographically.

The Oregon Mass Timber Coalition, a partnership between Oregon’s research universities, government agencies such as the Department of Land Conservation and Development and the Department of Forestry, as well as the Port of Portland, received a \$41.4 million Build Back Better grant to advance Oregon’s sustainable mass timber sector. As a result of that funding, Clatsop County was chosen in September 2023 to participate in a code audit designed to identify standards and regulations in the zoning code that could be modified to reduce or eliminate barriers to the use of mass timber in housing construction. Those recommendations, which were completed in 2024, are being incorporated into the County’s zoning code as part of its Clear and Objective Standards for Housing code audit.

The cost and availability of housing for the local workforce is the top issue identified by the community questionnaire and is regularly cited by area businesses as one of the greatest challenges in attracting and keeping new employees. In February 2025, Timberland Inc., a subsidiary of Swinerton Incorporated, broke ground on a 190,000-square foot cross-laminated timber manufacturing facility. Once completed, the plant will provide 75 family wage jobs in the Willamette Valley. Promoting and encouraging these type of resource-based wood products businesses could bolster employment opportunities within Clatsop County and could efficiently use and process materials locally for housing production. The Oregon Mass Timber Coalition estimates that by 2025, mass timber will account of \$1.4 billion of the \$14 trillion global construction industry. By 2050, the share of mass timber could be in the trillions.

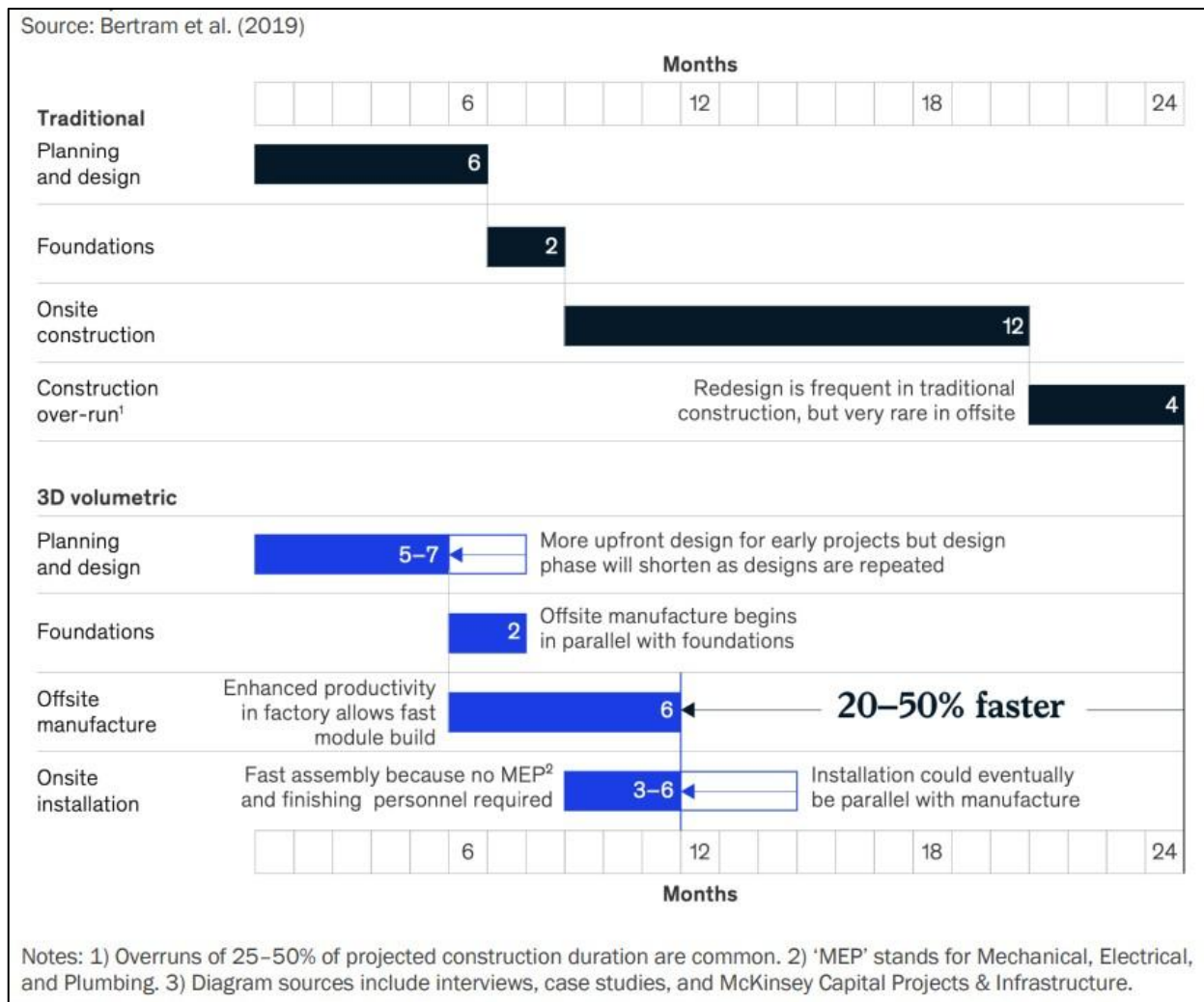
A February 2023 report by ECONorthwest, entitled, *Mass Timber Housing: An Assessment of the Ecosystem in Oregon* notes that the “imbalance in supply and demand for housing has resulted in steep competition for housing, which translates to rising prices and declining vacancies.” The report also demonstrates how the use of modular construction can reduce development timelines by 20-50% compared to traditional construction (Figure 4.13).

Through the Regional Housing Task Force, Clatsop County has established a collaboration with local municipalities and real estate developers to foster a conducive environment for new housing developments, including the use of mass timber construction. In 2024, the task force received grant funding from the Department of Land Conservation and Development (DLCD) to conduct comprehensive inventories of regional housing, land, and infrastructure for

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unincorporated Clatsop County and the five municipalities. The task force, in collaboration with local builders, has recognized that the shortage of trained construction and trades personnel is contributing to rising construction costs and exacerbating the housing shortage. As noted in Section 3, employment within the construction sector is anticipated to increase by 13% by 2033. Additionally, the Oregon Employment Department (OED) documented that the 2024 annual average wage for employees in the Construction and Extraction Sector in Northwest Oregon was \$63,231.

Figure 4.13. Development Timeline of Modular vs. Traditional Construction Techniques



Source: ECONorthwest

Many of these construction jobs, however, often require some type of post-secondary training. In Clatsop County, Tongue Point Jobs Corps provides various training programs, including carpentry, building construction, cement masonry, electrical work, glazing, painting, and plastering pre-apprentice programs, as well as advanced manufacturing welding training. Clatsop Community College offers courses in computer-aided design and apprenticeship programs in construction, electrical work, and plumbing, along with courses in industrial

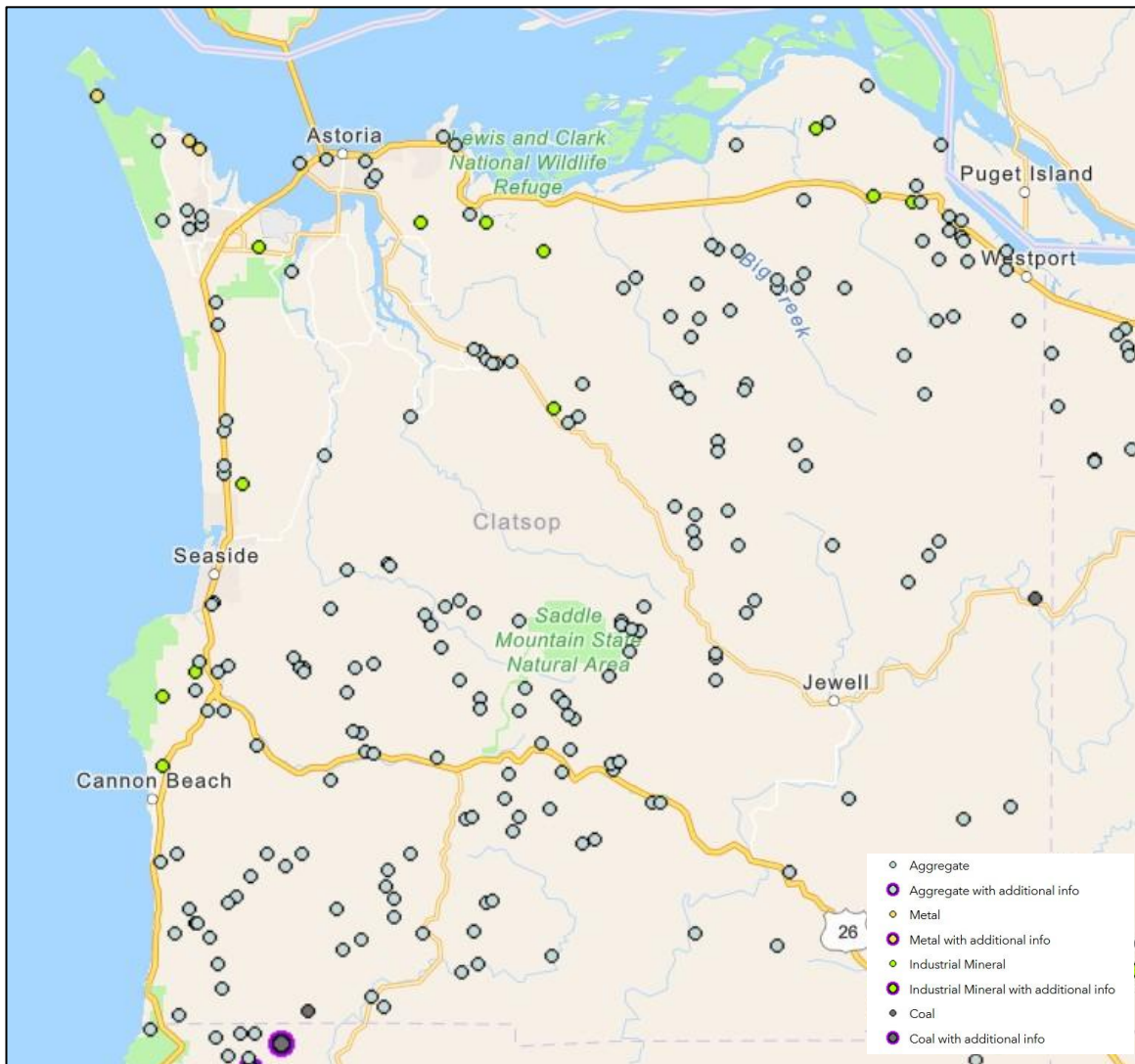
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mechanics and welding and fabrication. To address the existing and projected demand for housing development, an expansion of local construction trades training programs will be essential. Expansion of local construction trades training programs will be needed to meet the known and anticipated demand for housing development.

As discussed earlier in this section, construction and resource industries are comprised of more than just erection of buildings and harvesting of timber. Residences, commercial and industrial development require infrastructure such as roads, water, and wastewater to be viable.

Clatsop County already has a long-established relationship with the quarry/extraction sector, with quarries located in all quadrants of the county. Data from the Oregon Department of Geology and Mineral Industries (DOGAMI) indicates that aggregate is the primary material quarried within Clatsop County, with metal and industrial minerals located in areas near the coast and the Columbia River shoreline (Figure 4.14).

Figure 4.14. Mineral Information for Clatsop County



Source: Oregon Department of Geology and Mineral Industries

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As noted in Figure 3.15, while employment within the mining sector is projected to decrease between 2023-2033, jobs in this industry provide living wage salaries, with the average annual wage in Clatsop County in 2022 being \$64,294.

The 2023 Clatsop County Comprehensive Plan Goal 5: Open Spaces, Scenic and Historic Areas, and Natural Resources also highlights the significance of mineral and aggregate resources within the county. The Goal 5 Mineral and Aggregate Resources Inventory features 11 designated sites. These locations supply a variety of rock, sand, and gravel resources essential for general construction, as well as road construction and maintenance. The availability of these resources plays a crucial role in supporting the local economy.

FOOD PROCESSING INDUSTRIES

- Seafood processing
- Research and innovation businesses
- Breweries, cideries and distilleries
- Food processing support industries
- Farm to table businesses
- Tourism-related businesses

Food Processing Sector

The food processing sector already has a strong presence in Clatsop County. The historic fisheries industry dates back more than 100 years and has taken several different forms. The Oregon History Project narrative *The Oregon Coast – ‘Forists and Green Verdent Launs*, notes that “the commercial salmon fisheries developed in the 1860s, supporting early salmon canning enterprises in Astoria, Tillamook Bay, Yaquina Bay, and Gold Beach. By the turn of the 20th century, commercial fishing was an important part of the economy of every major coastal town.

Fishermen supplied crab, black cod, halibut, albacore, pink shrimp, and several varieties of rock fish to packers and fresh markets both locally and inland.” The industry has seen several significant boom and bust periods. Astoria and Warrenton are home to several seafood processing businesses. The County is also home to the Oregon State University Coastal Marine Experiment Station (COMES). The lab conducts research and development, extension service to both the fishing and seafood processing industry and access to graduate level student research.

Recent research and educational initiatives are focused on the concept of 100% Fish Utilization. The Oregon Coast Visitors Association (OCVA) sponsored local presentations by Dr. Alexandra Leeper, CEO of the Iceland Ocean Cluster. The Iceland Ocean Cluster aims to motivate the seafood industry and local communities to maximize the utilization of each fish, thereby enhancing business and employment opportunities while minimizing waste. Recent advancements in products and processes have resulted in an increased economic return on a typical Atlantic Cod, reaching nearly \$4,750 per fish. The Iceland Ocean Cluster serves as a business incubator and research center that is successfully creating new uses and markets for fish and fish by-products. OCVA is also actively facilitating research and innovation discussions

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in Clatsop County as part of its 2024 initiatives. The role this type of activity could play in Clatsop County is discussed under the “Blue Marine Economy Section” portion of this section. Seafood processing is also discussed in further detail in that section.

Food processing, however, is about more than just whole fish utilization or seafood processing. Recently a local boom in the brewing and distilling industries has occurred within the County. Breweries, cideries and distilleries are currently located in Astoria, Seaside, and Cannon Beach. A 2022 report sponsored by CEDR, Business Oregon, Col-Pac and Clatsop County entitled, “Clatsop County Fermentation Industry – Cluster Development” highlights the growth of the beverage industry in the area:

As Clatsop County’s fermentation cluster has created jobs and invested in business expansion, it has created significant direct and indirect economic impacts. During the last five years, the fermentation cluster has been responsible for more than \$30 million in local spending and investments in site development and equipment. Total estimated cluster employment is 520 full- and part-time employees averaging \$18 million in annual local wages.

The food and beverage processing sector can create challenges for municipal wastewater treatment systems that need to be addressed if these sectors are to grow. As a result of wastewater treatment concerns for local seafood processing companies, the Port of Astoria is developing a Byproducts Recovery Center (BRC) designed to support the seafood industry, promote environmental sustainability, and enhance regulatory compliance. In January 2025, the Port collaborated with the Center for Sustainable Infrastructure and Business Oregon to host meetings focused on innovative resource recovery practices implemented in Denmark. In a press release issued in January, the Port emphasized the BRC, stating, “The facility is being designed with cutting-edge technology to process water and extract valuable byproducts, such as fish oils and proteins, for potential reuse. The advanced technology employed at the BRC will enhance environmental outcomes, ensure sustainable fisheries, and represent a significant investment in the local economy.

Clatsop County has also completed a study to determine the feasibility of establishing an anaerobic biodigester to process residential septage, along with high-strength organic waste generated by businesses in the seafood processing and fermentation/distilling industries. Phase II of the research is in process, which includes digestion pilot testing, public outreach and siting development. This issue is also discussed in further detail in the “Challenges” section below.

Additional Sector Opportunities

Clatsop County Fairgrounds

County-operated facilities add to the overall economy. Goal 9 of the County’s comprehensive plan identifies the Clatsop County Fairgrounds as an important asset to the greater community. The Clatsop County Fair & Expo is located on 109 acres overlooking the Wallooske River, three

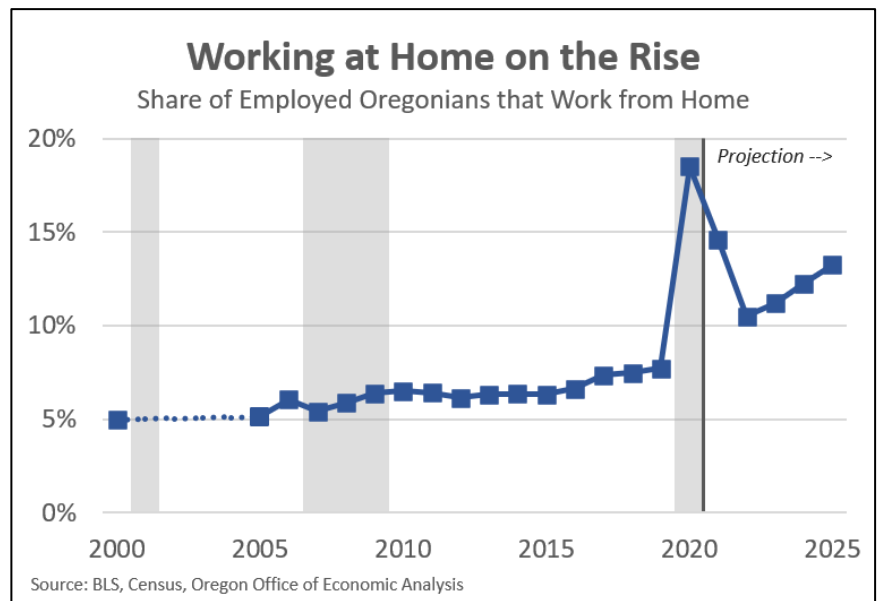
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miles from Astoria. The facilities include the 12,000-square-foot exhibit hall, a 40,000-square-foot indoor arena that seats 1,800 spectators; hard-surface parking for 1,000 cars; ample close-in parking for exhibitors; barns for up to 100 horses; spacious outdoor entertainment and carnival areas; and other facilities. The County also manages and maintains 12 county park sites offering active and passive recreational opportunities for residents and visitors. These sites support other state-owned and private recreational opportunities within the county. In 2025, the Fairgrounds will be applying to update its conditional use permit to allow additional events and uses. It will also undertake an update of its Strategic Plan, which was last reviewed and revised in 2009.

Remote Worker Economy

While not identified as a specific growth industry, the remote worker economy has recently appeared on the radar in Clatsop County. The Covid -19 pandemic ushered in a new potential growth sector. The ability to work remotely allows people in some fields flexibility to live anywhere. The Oregon Office of Economic Analysis estimates that between 2019 and 2020 the number of people working from home increased by 211,000. This number has decreased somewhat from the pandemic highs, but “Zoom Towns” are now part of the workforce language. The worker from home needs a residence and a good connection to the internet. Further study is necessary to determine the potential impacts of this trend.

Figure 4.15. Remote Worker Trends



Since the first economic development planning in the late 1970s and early 1980s, Clatsop County has strived to diversify its economy. The three major sectors- forestry, fisheries and travel and tourism-provide the bulk of employment opportunities but are known for the seasonal and cyclical nature of the industries. The harvesting, processing and use of natural resources that have long been at the center of all three of these sectors is evolving through changes to external regulations and greater business efficiencies. The opportunities outlined in this section are not designed to replace these three traditional sectors; rather they are designed to augment and update these sectors and add new focus for where future financial and human resources are spent. The Clatsop County economic story reflects the location and resources available to the community. These sectors are designed to capitalize on the current

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assets and historical economic drivers of the Clatsop County economy and focus on preparing for the next generation of jobs. These growth areas do not move away from what the county is or has been, rather the growth areas are designed to capitalize on strengths and highlight future employment opportunities.

Employment Lands Analysis

As part of the development of this Economic Opportunities Analysis, Clatsop County utilized Johnson Economics and MacKenzie Inc. to prepare a buildable lands inventory (BLI) for employment lands to identify those parcels available for and suitable for development by commercial and industrial uses in unincorporated areas. Each city manages the employment lands BLI within their boundaries.

Geographic information systems (GIS) data from the county, Federal Emergency Management Agency (FEMA), Oregon Department of State Lands (DSL), Oregon Department of Geology and Mineral Industries (DOGAMI), United States Geological Survey (USGS), and Oregon Department of Land Conservation and Development (DLCD), were used to determine each parcel's developability.

Vacant and Developed Lands Analysis

Two different categories of land were analyzed. The vacant lands analysis followed a simple process to determine the amount of vacant commercial or industrial land available.

Vacant Lands Criteria:

1. Categorize land zoned for employment using the following Clatsop County zoning districts:

a. General Commercial	GC
b. Neighborhood Commercial	NC
c. Tourist Commercial	TC
d. Heavy Industrial	HI
e. Light Industrial	LI
f. Marine Industrial	MI
g. Rural Community Commercial	RCC
h. Rural Community Commercial and Light Industrial	RCC-LI
i. Rural Community Industrial	RCI
j. Quarry and Mining	QM
2. Remove developed properties (per county property tax records)
3. Remove constrained properties (or portions of parcels that are constrained):
 - a. Wetlands (DSL and Local Wetland Inventories)
 - b. Inaccessible (Parcels without access to public or private roads)
 - c. Slopes/High or Very High Landslide Susceptibility (DOGAMI Data)
 - d. Flood Plains (Currently adopted FEMA maps)
 - e. Size or Shape Characteristics (Irregular shapes with setback constraints)

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Once vacant employment land parcels were identified, areas were removed due to development constraints, including geohazard zones, National Wetland Inventory wetlands, FEMA mapped flood zones, parcels with no access, and parcels less than ½ acre in size or with irregular shapes. The first table in Appendix B includes all the parcel data. The following table shows the listing of potentially developable vacant parcels. The analysis reveals that approximately 60 acres of land is available for development in unincorporated Clatsop County. Most of these tracts are scattered sites without public sanitary sewer or water services available, thus making little potential impact on development and employment. There are several parcels near Knappa that could be developed utilizing the local water system in the community. None of the sites have a community sanitary sewer system available.

Figure 4.16. Vacant Employment Lands Abbreviated Table

Map Taxlot	Taxlot Acres	Comprehensive Plan Designation	Zoning Designation	Acres within Zone	Vacant Development Acres	Wetland Acres	Net Acres
80717CD04100	1.00	Development	RCC-LI	1.00	1.00	0.00	1.00
810340002100	4.06	Rural Lands	LI	3.32	3.32	0.92	2.40
80720B002902	6.79	Development	RCC-LI	6.78	6.78	0.00	6.78
80627DA00501	2.49	Rural Lands	GC	2.49	2.49	0.00	2.49
80627DA00300	1.07	Rural Lands	GC	1.07	1.07	0.00	1.07
80720B002608	1.27	Development	RCC-LI	1.27	1.27	0.07	1.20
51004DD01601	1.92	Rural Lands	GC	1.89	1.89	0.00	1.89
80822AC00700	1.67	Development	RCC	1.63	1.63	0.00	1.63
407060000501	1.05	Rural Lands	TC	1.05	1.05	0.07	0.98
80720B002600	3.54	Development	RCC-LI	3.54	3.54	0.13	3.41
80720B002607	1.19	Development	RCC-LI	1.19	1.19	0.00	1.19
507110000102	1.00	Rural Lands	LI	1.00	1.00	0.00	1.00
508250000800	1.06	Rural Lands	TC	1.06	1.06	0.00	1.06
50731DC00600	2.05	Rural Lands	TC	2.05	2.05	0.05	2.00
508270000502	4.33	Rural Lands	NC	2.40	2.40	0.00	2.40
50731DC00200	26.86	Rural Lands	TC	20.38	20.38	0.77	19.61
80717CD04200	0.89	Development	RCC-LI	0.89	0.89	0.00	0.89
80717CD04300	1.03	Development	RCC-LI	1.03	1.03	0.00	1.03
509230001301	5.88	Rural Lands	TC	5.84	5.84	0.39	5.45
509230000408	3.16	Rural Lands	TC	3.15	3.15	0.00	3.15
TOTAL							60.63

There is potential to swap employment lands from one area of the county to another site, however, this would have an impact on the value of the parcels and the availability of willing participants in such a swap would make that a challenging proposition. Maps of the vacant development parcels are included in Appendix B.

Redevelopment Lands Criteria:

A second, more complicated analysis looked at developed employment lands and used generally accepted standards to establish if a parcel or lot would be deemed “redevelopable”.

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Oregon Administrative Rules (OAR) 660-009-0015 requires an EOA to inventory both vacant and developed lands. “Developed lands” are defined by OAR 660-009-0005 as “non-vacant land that is likely to be redeveloped during the planning period” covered by the EOA. For the purposes of this EOA, to be considered “redevelopable” industrial parcels needed to meet the following criteria:

- Be at least two acres in size and have building values less than 30% of the total land value, or
- Be at least five acres in size and have less than a half-acre occupied by permanent buildings or improvements

Commercial parcels were required to meet the following criteria in order to be considered “redevelopable”:

- Be at least one acre in size and have building values less than 30% of the total land value, or
 - Be at least five acres in size and have less than a half-acre occupied by permanent buildings or improvements
1. Redevelopment based on the value of improvements
 - a. Categorize land zoned for employment using the same zoning districts as the vacant land analysis
 - b. Analyze each parcel’s assessed valuation to determine if the ratio of the improvements to land values is less than 30%.
 - c. Parcels with improvements valued at greater than 30% of the land value were deemed developed and likely to remain so. Those with ratios less than 30% were further analyzed to determine the characteristics of each parcel.
 - d. Environmentally constrained portions of the tract were removed from the analysis
 2. Redevelopment based on area of parcel currently developed and the parcel size.
 - a. Categorize land zoned for employment using the same zoning districts as the vacant land analysis
 - b. Commercial parcels greater than one acre in size where less than ½ acre had been improved were deemed potential redevelopment sites.
 - c. Industrial parcels greater than five acres in size where less than ½ acre had been improved were deemed potential redevelopment sites.
 - d. Environmentally constrained portions of the parcel were removed from the analysis

The analysis identified six parcels, totaling 24 acres of commercial redevelopment lands. No industrial parcels meeting the criteria for redevelopment lands listed above were found. The maps identifying development constraints and maps showing all vacant employment lands and lands that could be redeveloped are included in Appendix B.

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Figure 4.17. Developed/Redevelopable Lands Table

Map Taxlot	Taxlot Acres	Zoning	Acres within Zone	Improvement AV	Land AV	Improvement to Land %	Constraints	Redevelopment Acres
71022B001200	1.04	NC	1.04	\$27,042	\$151,172	18%	None	1.04
507310000301	19.03	TC	3.80	\$42,774	\$110,302	39%	None	3.80
407060000500	11.03	TC	11.03	\$68,739	\$198,334	35%	Residential Use	11.03
407040002100	2.28	TC	2.28	\$5,057	\$183,363	3%	Residential Use	2.28
50917DC00900	1.59	TC	1.59	\$5,907	\$45,932	13%	None	1.59
50921B000100	12.00	TC	4.25	\$33,949	\$195,137	17%	Residential Use	4.25
TOTAL								23.99

Land Projections

A land projections analysis was completed by Johnson Economics. The full text of the analysis can be found in Appendix B. The report found that employment lands within the municipalities will be able to handle anticipated employment growth for the foreseeable future. The analysis, however, was completed before the release of new FEMA floodplain regulations and the draft Flood Insurance Rate Maps. The latter expands the quantity of land within the Special Flood Hazard Area and the former significantly raises and increases the requirements for development within the floodplain. These changes will negatively impact the amount of developable employment lands due to significant increased development costs associated with mitigation of flood storage and habitat replacement. The full impact of the regulatory changes on employment land projections is not currently known.

The county will work with the municipalities to ensure that future employment lands needs are met in appropriate locations where necessary infrastructure is available.

Economic Development Tools

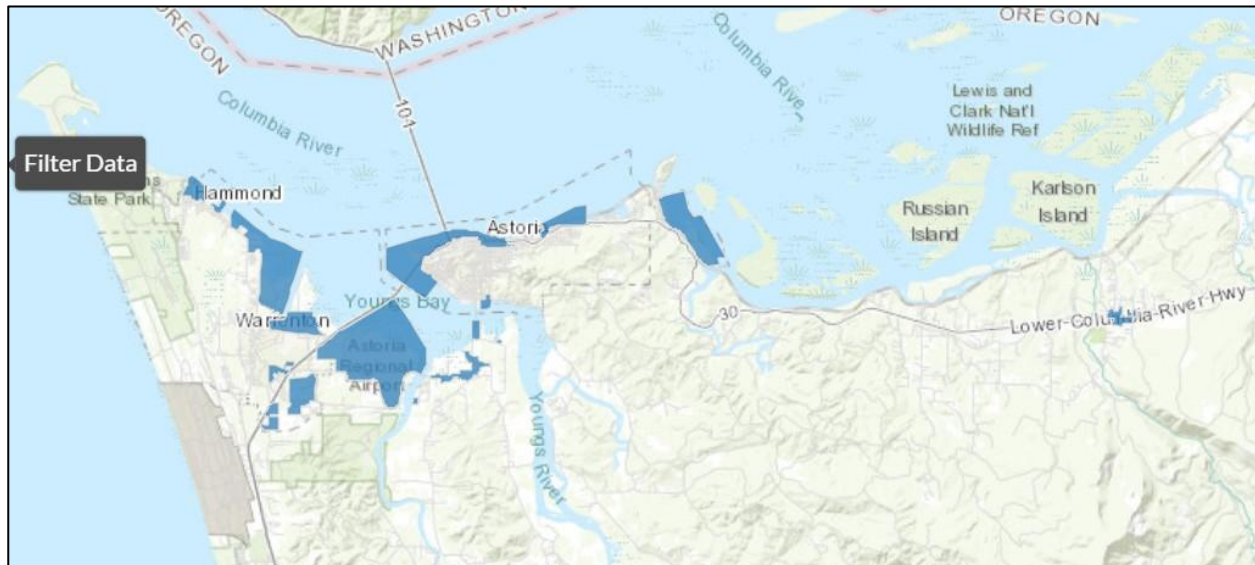
Enterprise Zones

Enterprise zones were formed in 1986 to help foster employment opportunities and increase local competitiveness. These zones offer tax relief on new private capital in exchange for investing and hiring in the enterprise zone. Qualifying businesses receive exemption from local property taxes on new facilities and equipment for at least three years (but up to five years) in the standard program. Longer term tax incentives are available in many zones. There are currently 73 enterprise zones across Oregon: 55 rural and 18 urban. Local governments are responsible for creating, amending, managing, and renewing most of these zones, until June 30, 2032.

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The Clatsop Enterprise Zone was created in 2015, with four sponsors: Clatsop County, City of Astoria, City of Warrenton and Port of Astoria. This enterprise zone will expire on June 30, 2025. The County's enterprise zone is currently managed by Clatsop Economic Development Resources. In 2022, the County, in coordination with the cities of Astoria and Warrenton, and the Port of Astoria, approved a 15-year Long-Term Rural Enterprise Zone abatement agreement with WCT Marine and Construction, Inc., which would develop and operate a mobile boat lift at Tongue Point.

Figure 4.18. Clatsop County Enterprise Zone



Source: GEOHub Data, State of Oregon

Opportunity Zones

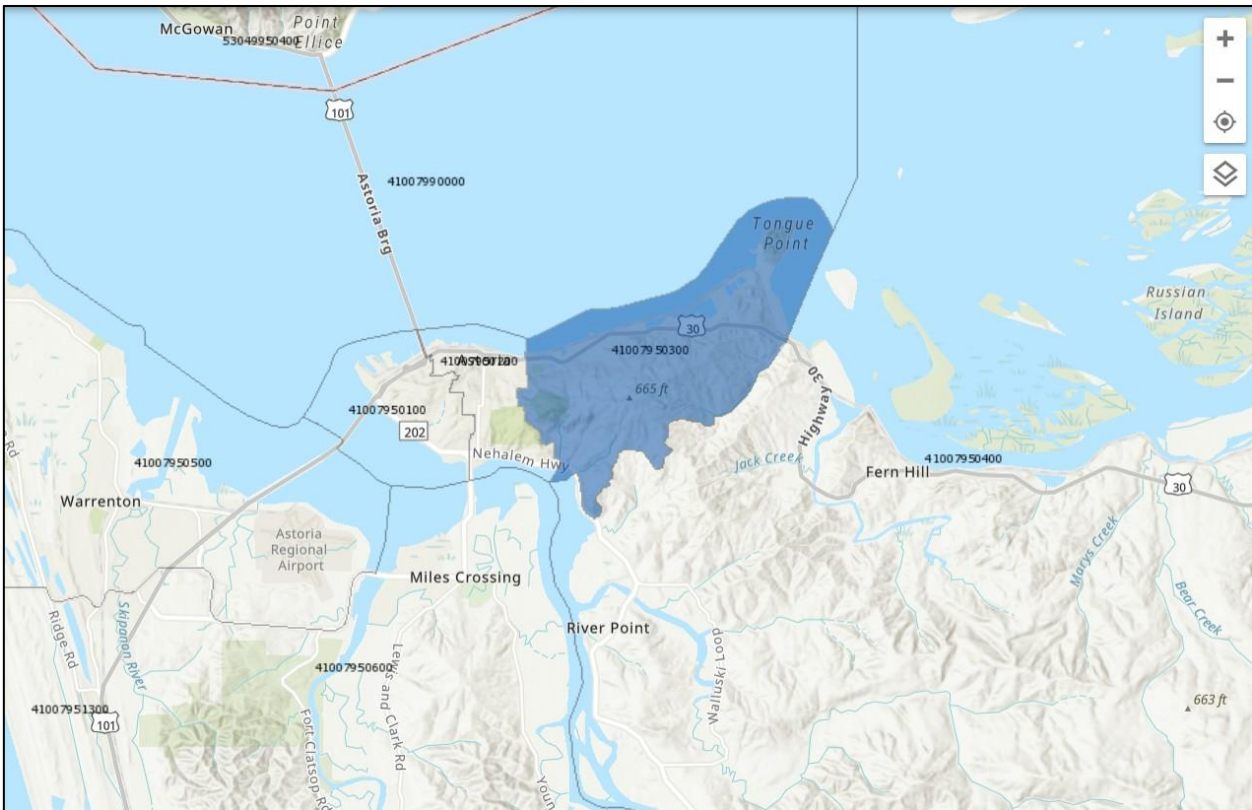
In 2018, the U.S. Treasury created Opportunity Zone designations across the country to encourage long-term investments through a federal tax incentive. Opportunity Zones can deliver significant tax savings on medium- to long-term investments in economically disadvantaged communities. This new tax incentive pertains to both the capital gains invested initially through a qualified opportunity fund (QOF), as well as future capital gains earned on the original investment in zone-based businesses or projects. There are 86 qualified opportunity zones in Oregon.

Each zone consists of an entire census tract, as established for the decennial U.S. Census. Census Tract 9503 in the City of Astoria has been designated as a Low-Income Community Opportunity Zone. The 4.5-square mile tract has a population of approximately 3,000 and is the only enterprise zone in Clatsop County. The median household income within the opportunity zone is approximately \$45,000, which is 33% lower than the median household income for the state of Oregon. It is also estimated that 17% of the households within the Opportunity Zone are below the poverty line.

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The designations are in effect until December 31, 2028, and offer a predictable basis for private investment decisions over several years. Under federal law there is no process to change or add zones. As such, Oregon's nomination process entailed thorough analysis of all relevant census tracts for their potential to be used and to address economic needs, as well as extensive outreach to the general public, federally recognized Indian Tribes, local governments, and other parties over a 3-month period. Aside from the opportunity zone nomination process, state government does not have an ongoing, official role under federal law.

Figure 4.19. Clatsop County Opportunity Zone



Source: opportunityzones.com

Local Improvement Districts

Improvement districts assign all or a portion of the cost of infrastructure improvements to the properties that will directly benefit from them. These costs to property owners are in addition to the standard assessed property taxes, but typically substitute for System Development Charges (SDCs). A Local Improvement District (LID) is a method for a group of property owners to pay for improvements that will provide collective benefits to them all. Oregon law authorizes local governments to establish LIDs and they are common in Oregon.

Tax Increment Financing

The Tax Increment Financing (TIF) mechanism can be a powerful tool for generating dedicated

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funding for making public improvements within an identified district. TIF funding, sometimes referred to as "Urban Renewal" funds, works by freezing the current property tax base in the TIF district and assigning the future tax growth to the district itself to pursue projects identified in an adopted plan. TIF funds must generally be used for physical improvements to infrastructure and property, which may be public or private. In support of these goals, the TIF agency can contribute to related actions such as direct acquisition or pre-development phases (feasibility and design). These projects can include participating in public/private partnerships with developers for constructing projects.

General Obligation Bond

General Obligation (GO) bonds are secured by a taxing jurisdiction's ability to levy an increased property tax sufficient to pay the bond. The additional property tax is dedicated solely to repaying the bonds and cannot be used for other purposes. The amount and rate of the tax are unlimited so a jurisdiction may levy whatever amount is necessary to collect enough taxes to pay the bonds. They are usually issued as long-term, fixed-rate bonds, but they can be issued as short-term bonds, or variable rate bonds as well. GO bonds must be approved by a majority of voters and may only be issued to finance capital costs associated with the acquisition, construction, improvement, remodeling, furnishing, equipping, maintenance, or repairing of real or personal property.

Local Option Levy

A local option levy is a time-limited property tax (five years for operations and 10 years for capital projects), that is subject to voter approval. It is levied in addition to a taxing jurisdiction's permanent rate to pay for specified programs or investments. Local option levies are issued as a rate, rather than an amount, meaning that actual revenues may fluctuate from year to year with new development. Levies may be used for programs or operations, in addition to capital projects. Levies are subject to the limitations imposed by Measures 5 and 50.

State Grant and Loan Programs

The state offers many grants, loans, and other programs to assist in local projects, including many programs aimed at multimodal transportation improvements. These programs typically have an allocated budget for which localities can apply to fund proposed projects. Often additional matching funds are required. Examples are the Transportation and Growth Management program, Statewide Transportation Improvement Program (STIP), Sidewalk Improvement Program (SWIP), State Transportation Infrastructure Bank loans, and various programs for trails and open space. The state also administers many federal funding programs. As changes within the federal government occur, however, federal and state funding may be reduced in the future and these funding sources may no longer exist or be funded at current levels.

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Challenges

Regulatory Constraints

The 1973 passage of SB100 significantly changed how land use planning was managed in Oregon. According to the Senate Bill 100 preamble,

Uncoordinated use of lands within this state threatens the orderly development, the environment of this state and the health, safety, order, convenience, prosperity and welfare of the people of this state. To promote coordinated administration of the land uses consistent with comprehensive plans adopted throughout the state, it is necessary to establish a process for the review of state agency, city, county, and special district land conservation and development plans for compliance with state-wide planning goals and guidelines.

The state-wide planning goals and guidelines places guardrails and limits on the development patterns throughout the state. The recently updated and adopted Clatsop County Comprehensive Plan meets the requirements of the state laws and Oregon Administrative Rules that implement SB 100. Oregon planning laws are generally directive in nature with a heavy emphasis on land conservation for farming and forestry. These stricter land use regulations, however, have created unforeseen and unintended impacts, including increased development costs and time delays for major economic development efforts.

The state planning rules restrict land for commercial and industrial uses and limits urban growth boundaries to reduce impacts on adjacent rural land uses. OAR 660-009-0005 defines the total employment land supply as “the supply of land estimated to be adequate to accommodate industrial and other employment uses for a 20-year planning period. Total land supply includes the short-term supply of land as well as the remaining supply of lands considered suitable and serviceable for the industrial or other employment uses identified in a comprehensive plan. Total land supply includes both vacant and developed land.” Clatsop County and the five municipalities regularly monitor the availability of employment lands and residential lands to ensure that economic growth can occur.

Statewide planning rules also limit where public facilities and services, such as community water and sewer, can be located outside of urban growth boundaries. These limitations are intentionally designed to direct commercial and industrial growth to incorporated and urbanizable areas and restrict opportunities for employment growth in unincorporated areas.

In addition to state planning regulations, Clatsop County economic development opportunities are also impacted regulations related to wetlands and floodplains. The Department of State Lands (DSL) oversees wetlands within the state. While development is not prohibited within wetlands, the mitigation required to address those impacts can be significant and expensive. The inability to find suitable mitigation sites can prohibit development or make it economically

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infeasible. The County should give consideration to establishing a wetland mitigation bank to assist local development efforts.

With regard to floodplain issues, Clatsop County is subject to the requirements of the National Flood Insurance Program (NFIP). While this is a voluntary program, it provides an essential service by allowing property owners to obtain flood insurance and allowing the County to remain eligible for federal disaster assistance. Per information provided by the Federal Emergency Management Agency (FEMA), there are 336 active flood insurance policies in Clatsop County, providing \$98,111,000 in coverage. As an NFIP participant, the County must comply with all regulations and requirements of the program. In 2024, FEMA mandated that local jurisdictions adopt one of three Pre-Implementation Compliance Measures (PICMs). The measures are intended to avoid, minimize and/or mitigate impacts on endangered species and protect wildlife habitat. To comply with the new requirements, applicants would be required to provide compensatory flood storage, create new pervious areas, and/or replace trees larger than six inches in diameter. These requirements would be extremely expensive for property owners, would discourage investment and reinvestment and would curtail opportunities to construct housing. At this time, the Board of Commissioners has not adopted the new regulations. Changes at the federal level, coupled with ongoing litigation occurring at the state level, have made it unclear whether these new changes will continue to remain mandatory for participating NFIP communities.

Geographic and Natural Constraints

Clatsop County is blessed with ample natural beauty. It is part of what makes this a unique and desirable place to live. This natural beauty, however, inherently includes geographic and environmental constraints that significantly impact the designation and development of employment lands. A significant portion of the Coastal Mountain Range has limitations due to steep slopes and slide hazards. Wetlands, floodplains, compressible soils, and tsunami evacuation zones all impact the amount of land available for future commercial and industrial development and significantly increase development costs.

Infrastructure Constraints

The Oxford Dictionary defines infrastructure as the basic physical and organizational structures and facilities needed for the operation of a society or enterprise. This is a broad definition that can include many aspects of a community. Traditional infrastructure (such as public sanitary sewer and water systems) limitations in the unincorporated portions of Clatsop County constrict commercial and industrial development. According to the Clatsop County Comprehensive Plan Goal 11, there are nine community water districts, and five sanitary sewer districts located in the unincorporated areas of Clatsop County. Many were created and designed to address historic residential development patterns in rural communities such as Arch Cape, Miles Crossing/Jeffers Garden, Knappa/Svensen, and Westport. An area near Westport and the Wauna Mill facility is also located within the Clatskanie People's Utility

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District. Any business with significant water use would challenge the capacities in most of the rural community water districts. Additionally, as discussed above, Goal 11 also limits when community sewer can be utilized in areas outside urban growth boundaries.

The cities of Warrenton and Astoria have wastewater treatment system constraints that are potential limiting factors for significant housing development and industrial and commercial expansion. Both communities are working through plant and capacity expansions currently. Water capacity is a concern for Gearhart, Seaside, and Warrenton and the areas served by the Warrenton water system. Expansion of these systems, however, can be very costly and take years to complete. As the state looks to increase housing production, additional consideration must also be given to funding to ensure that the services needed to serve new residents, employees and businesses is available.

Concerns regarding the costs associated with the transportation of residential septage, along with regulatory issues related to high-strength organic waste (HSOW) generated by the seafood processing and beverage manufacturing sector, prompted the County to conduct a feasibility study on the ability to site an anaerobic digester that addresses these unique feedstock concerns in Clatsop County. This technology is regarded as a promising solution for stabilizing HSOW and generating renewable energy. Initial research was completed in 2022, and Phase II of the research is currently underway. This initiative has the potential to mitigate environmental challenges associated with food manufacturing processes and stabilize costs for residential septage hauling.

The Port of Astoria is also developing a Byproduct Recovery Center in support of the seafood processing industry. The facility would be designed to receive process water and to extract usable byproducts, such as fish oils and proteins, for potential reuse. The impetus for the center were new standards for wastewater treatment issued by the Oregon Department of Environmental Quality in 2023. Without new technology designed to meet the new clean water requirements, it is likely that local seafood processors would be able to demonstrate compliance. In turn, that cause the closure of these processing facilities and eliminate jobs within Clatsop County.

Transportation infrastructure constraints include the public road and transit systems, where seasonal traffic congestion and safety are a significant local concern. Traffic issues were identified in the community survey and by members of the TAC as a major concern for future economic development efforts. The county intends to update the 2015 Clatsop County Transportation Systems plan in FY 25/26. There is no existing passenger rail service in Clatsop County and commercial freight rail service does not extend west beyond the Wauna Mill site in the northeastern corner of the county. Currently, there are no plans to extend the freight service or to reestablish passenger service.

The Astoria Regional Airport (AST), operated by the Port of Astoria and located within the City of Warrenton, provides for local flight instruction and operations and serves as a base for the

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United States Coast Guard. No public air or cargo service is available from the airport facility. The Port of Astoria continues to promote industrial development within the City of Warrenton at the Airport Industrial Park. Da Yang Seafood and Bornstein Seafoods recently partnered with the Port to develop a fish meal processing plant.

The lack of rail service and air service, and the distance to the interstate highway system present challenges to certain types of economic growth. As the distance from major interstates increases, so does the cost to move raw materials and finished goods. Movement of goods in the region is primarily conducted via the Columbia River, which connects to ports inland and around the world. The U.S. Army Corps of Engineers has reported that \$23 billion worth of regional products are transported annually along the Columbia River. Preservation of the shipping channel and deep-water ports within the county are important economic generators.

Access to broadband internet services has become an essential infrastructure component, particularly during the COVID pandemic. While internet availability and speed has significantly increased in Clatsop County over the past ten years, there is still considerable room for improvement. “Oregon by the Numbers” a 2024 report from the Ford Family Foundation indicates that 83% of Clatsop County residents have access to broadband internet services. This is approximately 7% lower than the state of Oregon as a whole and second lowest percentage of any of the coastal counties.

Human Resources Constraints

Historically, Goal 9 economic development planning efforts in Clatsop County identified the lack of training programs for new and emerging job sectors as a concern for future economic growth. Clatsop Community College, MERTS, Tongue Point Jobs Corps Center, and Northwest Oregon Works all participate in or sponsor a wide variety of job-training programs to meet local resident and business needs. Some private employers also offer apprenticeships, internships, and other on-the-job training programs. The emerging business sectors and new job categories require responsive training programs to meet future business needs. The effectiveness and responsiveness of these training programs will continue to be a concern for area businesses.

Another human resource constraint that has received considerable attention over the past ten years is accessibility to and cost of childcare for working families. It has become an essential component for growing the County’s economy. Respondents to the community questionnaire noted the shortage of childcare spaces as a concern for working families and a threat to job growth. County staff participated in statewide rule making procedures that were designed to address often conflicting regulations and requirements related to zoning, building codes, and licensing. The county has also adopted development code changes to allow childcare facilities in more zoning districts and through a more simplified review process. In 2022, the Board of Commissioners created a Child Care Grant program to retain and expand childcare options, with \$500,000 from Clatsop County and \$120,000 each from Columbia Memorial and Providence Seaside Hospitals. While Clatsop County is no longer considered a childcare desert

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for preschool-aged children, there is still a significant lack of childcare spaces available for infants and toddlers.

The aging of the national, state and local populations and the in-migration of more retirement age people to Clatsop County will change how the county needs to address future employment trends. The Oregon Employment Department published a report entitled, *Oregon's Labor Force: What slower population Growth and Increasing Retirements Mean for the Workforce* in July 2024 that outlined some of these concerns in detail. The report states:

The youngest members of the large Baby Boom generation, born 1946 – 1964, turn 60 years old in 2024. These workers have been, and are expected to continue shifting into retirement, and taking their skills and experience with them.

The report continues:

Oregon's trend matches the U.S. In the early 1990s, one out of ten jobs were held by a worker aged 55 and older. By 2022, the U.S. share of jobs held by workers 55 and older was 24%.

Not all sectors are evenly impacted by the aging of the workforce. According to the Oregon Employment Department and U.S. Census Bureau, Quarterly Workforce Indicators, the top three sectors with the highest percentage of workers aged 55 and older are:

Agriculture, Forestry, Fishing, and Hunting	33%
Mining, Quarrying, and Oil and Gas Extraction	32%
Real Estate and Rental and Leasing	29%

Three sectors with the lowest percentage of workers age 55 and older

Management of Companies and Enterprises	21%
Information	19%
Accommodation and Food Services	17%

The sectors with older age cohorts tend to be more mature economic sectors in Clatsop County. The accommodation and food services sector jobs typically include a larger number of young workers, and have a lower average pay rate than other sectors and are often seen as an entrance point into the workforce.

Clatsop, Tillamook, and Columbia counties have 27%, 28%, and 26% respectively of each work force that is aged 55 or older. The PSU population projections cited earlier indicate that the in-migration of people retiring to the area will continue. The aging of the population could lead to a drop in the percentage of the population in the workforce creating a higher demand for working-age population.

Members of the TAC noted a shortage of construction and trades people in Clatsop County and

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along the Oregon coast. Securing a local contractor for new construction or remodeling is often challenging. In addition, there is an acute shortage of licensed building officials and building inspectors. Local units of government have a very difficult time recruiting licensed individuals or people interested in this field for these positions. The challenge of recruiting builders, construction employees, and building officials will have a ripple effect on future housing construction.

These human resource constraints are difficult for a single unit of government to address, but they must be included in the overall discussion of the health of the economy.

Section 5: Goal Statements and Implementation Steps



Logging Railroad Source: Clatsop County Historical Society

SECTION 5: GOAL STATEMENTS AND IMPLEMENTATION STEPS

Overview

The previous four sections document the past planning efforts, current conditions and future economic trends affecting Clatsop County. Data has been provided to illustrate potential growth sectors that already exist within the region and which can be further enhanced, along with new, emerging industries. To fully take advantage of this knowledge, however, a plan must be created and implemented. This section is intended to list the actions that will need to be taken and to identify the role of Clatsop County and its stakeholders and partners in each of those actions.

This section will begin by articulating the Goal Statements, or vision, that will be used to develop the Implementation Steps. These two components are described in further detail below.

Goal Statements – Goal statements document and detail the economic vision for Clatsop County over the 20-year planning period.

There are three major categories of goal statements. They are organized around Economic Activity, Housing, Public Safety and Resiliency. These statements are written to help create the positive vision of the Clatsop County economy through efforts by local governments, residents, public agencies, local businesses, and community organizations.

Implementation Steps – These are the tasks or activities that will help guide the County over the life of the plan.

Implementation steps are designed to provide more specific guidance for future work to be done by Clatsop County and partner organizations to achieve the vision within the goal statements. The implementation matrix details actions that can be taken to move the county economy towards that vision. The implementation steps are also categorized into general categories:

- **Establishing Partnerships** – Clatsop County can continue to play an important role in the coordination of local jurisdictions and agencies interested in economic development, workforce, and housing issues. Many of the challenges the county faces lend themselves to a coordinated discussion and not piecemeal efforts of individual cities and agencies. The regional economy and labor shed doesn't recognize boundaries, and issues such as housing and infrastructure are shared across the area.

While each jurisdiction, agency, and stakeholder group have their own realms of responsibility, it is important for all partners to understand what others are pursuing and how these efforts might work together and pool resources. To this end, the county can help coordinate with the incorporated cities, the Port of Astoria, CEDR, Col-Pac, and when appropriate the neighboring counties in the region economic development efforts.

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- **Advocacy** – A key purpose of coordination is to speak with a shared voice on the combined needs of the county at the state or inter-county level. As the County and local jurisdictions face an expected blow to tax revenues from land use restrictions imposed by implementation of FEMA’s Biological Opinion and ODF’s Habitat Conservation Plan, there will be an increased importance in speaking with a common voice on the fiscal impacts and resulting priorities.

For example, in 2023, the County completed an analysis of the fiscal impacts of tourism due to the stress put on County services and infrastructure in the high tourism season. One possible remedy would be to seek more discretion under state law to use the transient lodging tax (TLT) more flexibly than is currently allowed to help defray some of these costs. This is one example in which speaking with a unified voice, with support of cities, chambers, and other partners in support of this initiative will carry greater weight in the legislature.

Many other issues of regional concern, such as water and wastewater regulations, transportation infrastructure funding, state housing resources, environmental regulations, and local initiatives can all benefit from a unified voice. Through coordination, these asks of the legislature can be organized and prioritized to ease consideration at the state legislative level.

- **Shared Financial Investments, Incentives and Initiatives** – identified areas for future financial commitments where feasible.
- **Policy and Planning** – recommended changes to local policies or regulations, or new policies, to positively impact the economic conditions by creating a business-friendly environment.

A county’s role in economic development is typically very limited. The traditional roles and limitations of county government, originally identified in the 2005 plan, remain true today:

- The County provides certain services such as public safety, public health, land use planning and voting that are required under state law
- The following overall areas of concern are not typically areas of county government expertise:
 - Job training and education is the expertise of the community college
 - Job creation, growth and retention is the mission of Clatsop Economic Development Resources (CEDR)
 - Transportation, other than County roads, is the responsibility of the Oregon Department of Transportation (ODOT)
 - Health care, other than as provided by the County’s Public Health Department, is a private enterprise

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- Workforce quality is the venue of educators and the Oregon Employment Department
- Regulatory restrictions related to air and water quality are enforced by governmental agencies over which the county has no authority
- Real estate prices are the product of the free market

To accomplish the goals envisioned in this plan, while recognizing the above limitations, Clatsop County will need to work with multiple levels of government, public and private sector organizations, and the public. The implementation matrix below places Clatsop County in either a “Lead” or “Partner” role, defined as follows:

Lead –A lead role designation means the County may choose to coordinate the effort.

Partner – A partner role means that Clatsop County will take a supporting role to another local or regional group.

Goal Area 1 - Economic Activity

Clatsop County will have:

- EA.1.** Continued support of natural resource-based industries (agriculture, forestry, fishing, wood manufacturing), encouraging private and public investments in sustaining and modernizing these industries as they respond to global market and regulatory changes.
- EA.2.** A sustainable, growing, and diverse manufacturing industry with continued investment in infrastructure and workforce training.
- EA.3.** Targeted investment for growth and emerging sector industries by focusing on business expansion and retention, workforce training, technology advancements.
- EA.4.** A travel and tourism industry that supports living wage and high wage jobs and protects the natural environment that is the foundation of the County's tourism industry.
- EA.5.** A strong service-sector industry including retail outlets, tourist accommodations and food services that provide multiple levels of employment from entry-level to ownership.
- EA.6.** A vibrant and economically diversified port operation that invests in new emerging technologies and infrastructure and capitalizes on the County's locational advantages.
- EA.7.** A high-quality and expanding healthcare and wellness sector that meets the needs of the changing population of the County and draws people to receive healthcare services from around the Pacific Northwest.
- EA.8.** Accessible technology throughout the county that connects residents and businesses with the world and infrastructure that supports home-based workers, telemedicine and virtual educational opportunities.

Goal Area 2 - Housing

Clatsop County will have:

- H.1.** A strong local building and construction sector that provides a wide variety of training, apprenticeship, employment, and housing opportunities.
- H.2.** An expanded training, education, and apprenticeship system that promotes trades employment growth.
- H.3.** A commitment to housing affordability by partnering with affordable housing developers and the State of Oregon to encourage the construction of regulated affordable housing development and preservation throughout the County.
- H.4.** Local units of government committed to support construction of housing units at all levels of affordability and accessibility for local workers through the adoption of flexible development codes.
- H.5.** Agreement on the appropriate balance between the use of the housing stock for tourism purposes (short-term rentals and vacation homes) while ensuring that sufficient housing stock is available to Clatsop County residents.
- H.6.** A comprehensive transportation system, that includes a strong transit system for employees, residents and visitors that connects neighborhoods, cities and rural communities with employment centers.
- H.7.** An adequate supply of trained construction trades workers, building inspectors and building officials to meet the needs of the construction sector.
- H.8.** Clatsop County will have a coordinated strategy for seeking funding for and investing in planned water, wastewater, transportation, electricity, and other infrastructure improvements needed to support housing production throughout the county.

Goal Area 3 - Healthy, Safe and Resilient Community

Clatsop County will have:

- HSR.1.** A consistent and sufficient revenue source for local units of government that replaces the anticipated lost revenue from full implementation of the Habitat Conservation Plan enacted by the State of Oregon.
- HSR.2.** A growing healthcare sector serving all parts of Clatsop County with expanding services and improved connections to larger medical facilities in major metropolitan areas.
- HSR.3.** A coordinated public safety system including police, fire, EMT/first responders, and transportation systems that are adequately funded and work to protect all residents of and visitors to Clatsop County.
- HSR.4.** A state and federally-funded public health and community action safety net that addresses homelessness and housing insecurity in Clatsop County.
- HSR.5.** A strong local K-12 and post-secondary educational system that is responsive to the existing and future training needs of residents and businesses.
- HSR.6.** Adequate and affordable daycare facilities and programs for working families.
- HSR.7.** Continued sustainable actions and policies that support the farms, forests, rivers and the ocean which provide economic and recreational opportunities.
- HSR.8.** A sustainable resource-based employment sector.
- HSR.9.** Development patterns that promote resilience and protect public and private investments in infrastructure, homes and businesses.

Section 5: Goal Statements and Implementation Steps

IMPLEMENTATION STRATEGY MATRIX

	SUPPORTS GOAL #	ACTION DESCRIPTION	COUNTY ROLE	PARTNERS	TIMEFRAME	NOTES
ADVOCACY						
1.	EA.1 HSR.1	Advocate for state and federal investment in regional solutions to replace lost financial resources for jurisdictions impacted by implementation of the Habitat Conservation Plan. Work with affected counties and municipalities to coordinate a regional voice in Salem and Washington DC.	Lead/Partner	<ul style="list-style-type: none"> Clatsop County Board of Commissioners Association of Oregon Counties League of Oregon Cities Special Districts Association of Oregon Cities State and Federal elected officials 	Entire planning period	Clatsop County currently utilizes the services of CFM Advocates to lobby for county issues of concern at both the state and federal levels.
2.	EA.1 EA.2 EA.3 EA.8 H.1 H.2 H.3 HSR.1 HSR.3 HSR.4 HSR.7	Actively monitor and participate in the state legislative and administrative rule-making processes to ensure that the County's issues are appropriately addressed, and rural needs are addressed. Monitor legislation and	Lead/Partner	<ul style="list-style-type: none"> Clatsop County Board of Commissioners Association of Oregon Counties League of Oregon Cities Local legislative officials Cities 	Entire planning period	Clatsop County's Management/Policy Analyst actively monitors proposed legislation and seeks input from affected departments, districts, agencies and organizations.

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	SUPPORTS GOAL #	ACTION DESCRIPTION	COUNTY ROLE	PARTNERS	TIMEFRAME	NOTES
		administrative rules that impact: land use, economic development, transportation, transient room taxes, forestry, fisheries, housing, infrastructure funding, childcare resources, government procedures, and environmental regulation.		<ul style="list-style-type: none"> • Clatsop County Chambers of Commerce • Local business interest groups 		
3.	HSR.6	Monitor changing state regulations on the placement and approval of daycare centers. Where possible, open publicly owned lands for potential development.	Partner	<ul style="list-style-type: none"> • Clatsop County Board of Commissioners • Oregon Department of Early Learning and Care • Cities • Clatsop County chambers of commerce 	Entire planning period	Clatsop County participated with DLCD in an audit of its codes related to childcare centers between 2020-2022. LAWDUC amendments were adopted in spring 2023. In 2024, County staff participated in a statewide work group to address childcare barriers. In 2022, the Board of Commissioners created a Child Care Grant program to retain and expand child care options, with \$500,000 from Clatsop County and \$120,000 each

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						from Columbia Memorial and Providence Seaside Hospitals.
4.	H.1 H.7	Work with Oregon Building Codes Division and local jurisdictions to coordinate building official and building inspector training and certification programs.	Partner	<ul style="list-style-type: none"> • Clatsop County Board of Commissioners • Clatsop County Community Development Department • Cities • Oregon Building Codes Division 	Entire planning period	More than 80 percent of the existing code professional workforce is planning on retiring in the next 15 years, with more than 30 percent in the next five years. The impact of such retirements may be exacerbated by the small size of most code departments—a third of which have one to four members and more than half have nine or fewer members. As there is greater emphasis on housing construction, it is imperative that employees can be recruited and trained for these positions.
5.	EA.2 EA.4 HSR.3 HSR.9	Advocate for Oregon Department of Transportation investment in the safety, and capacity to the state highway system connecting Clatsop County to	Partner	<ul style="list-style-type: none"> • Clatsop County Board of Commissioners • Association of Oregon Counties • ODOT • NWACT • Cities 	Entire planning period	Despite its proximity to the Portland Metro area, Clatsop County’s only transportation links are via Highways 30 and 26. This leaves the County vulnerable to road closures from accidents and natural disasters. Continued improvements in the state

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	SUPPORTS GOAL #	ACTION DESCRIPTION	COUNTY ROLE	PARTNERS	TIMEFRAME	NOTES
		regional and international markets.		<ul style="list-style-type: none"> Clatsop County chambers of commerce Sunset Empire Transportation District State legislative officials 		transportation system are imperative to ensure economic viability.
COORDINATION						
1.	EA.2 EA.5 EA.6 EA.7 EA.8 H.1 H.2 HSR.2 HSR.3 HSR.4 HSR.6	Coordinate with area municipalities, and local service districts to advocate for state and federal investment for infrastructure related to housing, transit, transportation, community water systems, sanitary sewer systems, technology, public safety, and childcare facilities.	Partner	<ul style="list-style-type: none"> Clatsop County Board of Commissioners Association of Oregon Counties League of Oregon Cities Clatsop County local units of government Special districts State and federal elected officials COLPAC/NWACT HUD ODOT OHA Business Oregon 	Entire planning period	Much of this coordination is already occurring on several different issues, including housing. Continuing to present a unified voice on issues and legislation critical to the County's needs will increase the area's political presence.
2.	EA.3 EA.6	Support and engage regional and statewide partners.	Lead	<ul style="list-style-type: none"> Clatsop County Cities CEDR 	Entire planning period	Regularly meet and coordinate with regional and state organizations and

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	SUPPORTS GOAL #	ACTION DESCRIPTION	COUNTY ROLE	PARTNERS	TIMEFRAME	NOTES
				<ul style="list-style-type: none"> • Col-Pac • Business Oregon • Port of Astoria • Peer counties 		agencies to promote available employment space and land.
3.	H.1 H.2 H.3 H.4 H.7	Continue to promote the use of mass timber in housing construction through development code changes and continued training for building officials and inspectors.	Partner	<ul style="list-style-type: none"> • Clatsop County • Cities • Oregon Building Codes Division • Clatsop Community College 	Entire planning period	In December 2021, the Oregon Mass Timber Coalition received a Phase I EDA Build Back Better Regional Challenge grant to create an equitable and sustainable strategy to use mass timber (i.e., engineered wood product) technology to scale up housing production, create new sustainable manufacturing jobs, and benefit forest health. Clatsop County was selected by DLCD as one of 10 communities who participated in a code audit to identify areas where mass timber permissible policies could be included.
4.	EA.1 EA.3 EA.4 EA.5 EA.6 HSR.7	Coordinate research into a regional Blue Economy Business Incubator Center in conjunction with Clatsop Community	Lead/Partner	<ul style="list-style-type: none"> • Clatsop County Board of Commissioners • Port of Astoria • Clatsop County school districts • COLPAC 	1-5 years	This strategy has been used in several coastal cities to identify and mature innovative new businesses that create living wage jobs tied to the “Blue Economy”.

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	HSR.8	College and Oregon State University, Tongue Point Jobs Center, and other local and regional partners.		<ul style="list-style-type: none"> • CEDR • OCVA • Oregon State University Seafood Research Center • Clatsop Community College • Tongue Point Job Corps Center • Business Oregon • 		Clatsop County already has a strong “Blue Economy” base, which can be used to develop new businesses and services related to the maritime and fishing industries.
5.	EA.2 EA.6 EA.9 H.1 HSR.8 HSR.10	Coordinate with area municipalities in a systematic analysis of residential and employment land availability within each of the Urban Growth Boundaries.	Partner	<ul style="list-style-type: none"> • Clatsop County Board of Commissioners • Cities • Clatsop County GIS Department • DLCD • Chambers of Commerce • Clatsop Association of Realtors 	Entire planning period (5-10 year cycles)	This implementation measure would tie into related measures that call for the marketing of available commercial and industrial properties. Similar to the work being done by the Regional Housing Task Force, this measure would create a coordinated and unified approach to non-residential development countywide.
6.	EA.2 EA.4 EA.9 H.1 H.2 H.7	Support connections between local industry, K-12, community college, university and university extension	Partner	<ul style="list-style-type: none"> • Clatsop County Board of Commissioners • Clatsop Community College • MERTS 	Entire planning period	Help match training programs to employers, potentially coordinating internships or regular interaction with local businesses. Ensure that these programs address target

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	HSR.2 HSR.5	service for education and training courses.		<ul style="list-style-type: none"> • Tongue Point Job Corps • CEDR/SBDC • Clatsop County school districts • Employers • Chambers of Commerce 		industries in particular, and stay informed on rapidly evolving industry norms and technology.
7.	EA.2 EA.3 EA.7	Promote workforce training resources.	Partner	<ul style="list-style-type: none"> • CEDR/SBDC • Clatsop County • Clatsop Community College • Cities 	Entire planning period	Increase knowledge of new and existing training programs for job seekers via local economic development agencies, Worksource Oregon, high schools and the community college.
8.	EA.2 EA.3 EA.7 EA.8	Maintain and enhance business outreach and communication	Partner	<ul style="list-style-type: none"> • CEDR • Col-Pac • Chambers of Commerce • Clatsop County • Cities 	Entire planning period	Coordinate business cluster and employment district networking opportunities. Participate in efforts of major regional economic development partners. Potential actions in support of this strategy include developing and updating marketing materials, attending industry trade shows, following up on referrals by partner

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						organizations, publicizing the success of local businesses, and highlighting competitive advantages of the area for proposals.
9.	EA.3	Develop a market plan to attract businesses within the identified target industry business sectors	Partner	<ul style="list-style-type: none"> • CEDR • Col-Pac • Chambers of Commerce • Clatsop County • Cities 	Entire planning period (5-year cycles)	Assemble and distribute materials of specific interest to targeted industries and identify key industry groups. Adopt and regularly update target industry profiles.
10.	EA.3 EA.6	Regularly update Oregon Prospector to promote available employment space and land to site selectors.	Partner	<ul style="list-style-type: none"> • CEDR • Col-Pac • Clatsop Association of Realtors • Cities • Clatsop County 	Entire planning period	Business Oregon hosts the Oregon Prospector tool which provides open, free data on available employment lands across the state including both industrial and commercial properties. Ensure that all key sites are listed, and information is accurate and up to date. There are currently no properties listed in Clatsop County.
11.	EA.2 EA.6 EA.9 HSR.2 HSR.8	Create an Economic Development Dashboard that highlights business development, job	Lead/Partner	<ul style="list-style-type: none"> • Clatsop County Board of Commissioners • Clatsop County Community 	Entire planning period	Making information uniformly and universally available creates a one-stop shop for developers. This concept is similar to the work

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		training and financing programs to augment services provided by CEDR/SBDC and maintain a listing of available commercial properties within the County.		Development Department <ul style="list-style-type: none"> • CEDR • Port of Astoria • Clatsop Association of Realtors • 		already completed on the County's Housing Dashboard.
12.	EA.3 EA.4 EA.5 H.5 HSR.7 HSR.10	Encourage regional recreation and tourism organizations that improve the quality of tourism and travel employment opportunities.	Partner	<ul style="list-style-type: none"> • Clatsop County Board of Commissioners • CEDR/SBDC • Clatsop County chambers of Commerce • OCVA • Travel Oregon 	Entire planning period	As noted throughout this report, many of the employment opportunities associated with the Leisure and Hospitality Industry do not provide living wage jobs. Increasing the quality of the tourism experience for visitors could assist in a higher value-added service and may result in increased wages.
13.	EA.7 H.1 H.3 H.4	Coordinate promotion of new housing development with area municipalities through the Regional Housing Task Force.	Lead/Partner	<ul style="list-style-type: none"> • Clatsop County Board of Commissioners • Regional Housing Task Force • Cities • Local contractors/developers • 	Entire planning period	This work is already ongoing. Based upon the recently released Oregon Housing Needs Analysis (OHNA) Methodology, Clatsop County will 5,430 units over 20 years, or 271 units per year across the county.

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14.	EA.3 EA.6 HSR.1 HSR.8	Establish an Economic Development Response Team to actively pursue funding for economic development initiatives, business grants, and economic research projects.	Lead	<ul style="list-style-type: none"> • CEDR/SBDC • Clatsop County chambers of commerce • Business Oregon • Clatsop County • Cities 	1-3 years	In order to become and remain competitive, the cities and the county must be flexible and quick when responding to possible economic development opportunities. Because day-to-day staff may not have the expertise or the time to quickly respond to these opportunities, having a team of qualified professionals, who can be convened in short notice would help give the County an advantage.
15.	EA.2 EA.3 EA.6 HSR.8 HSR.10	Work with municipalities to ensure that existing employment lands are developed so that they produce the highest employment and revenue values to all units of government.	Partner	<ul style="list-style-type: none"> • Clatsop County • Cities 	Entire planning period	Underutilized land represents lost economic opportunities. Given the county's limitations with regard to flood zones, geologic hazards and natural features (ocean, mountains, wetlands), employment lands must be put to their highest and best use.
16.	EA.4 EA.7 HSR.2	Advocate for and encourage the expansion of healthcare and wellness services	Partner	<ul style="list-style-type: none"> • Columbia Memorial Hospital • Providence Seaside Hospital 	Entire planning period	Expansion of facilities and services is currently occurring at both Columbia Memorial Hospital and Providence Seaside Hospital. As the

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		available within Clatsop County. Support promotional efforts to create a health and wellness cluster within the county.		<ul style="list-style-type: none"> • Clatsop Community College • Clatsop County school districts • Clatsop County chambers of commerce • 		population within the county increases in age, new services will be required as the population's healthcare needs change.
17.	EA.3 EA.6	Establish and maintain a competitive short-term and long-term supply of buildable land, in readily developable sites	Partner	<ul style="list-style-type: none"> • Cities • CEDR • Clatsop Association of Realtors 	1-3 years	Maintain an inventory of locally available lands and buildable sites in both incorporated and unincorporated areas of the county. Options to address land needs: ensure that existing buildable lands can be readily served. Either CEDR or Clatsop County could host this data on its website.
18.	EA.3 EA.6	Connect small business opportunities with property owners.	Partner	<ul style="list-style-type: none"> • CEDR/SBDC 	Entire planning period	CEDR/SBDC could serve as a clearinghouse, matching business needs with local property owners. This could include food carts, which can serve as an incubator for future food service tenants.
19.	EA.3 EA.6 H.1	Provide information and education to small developers.	Partner	<ul style="list-style-type: none"> • CEDR/SBDC • Clatsop County • Cities 	Entire planning period	Educating developers about city and county policies, goals for economic development

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						and housing and funding sources may provide greater clarity and certainty for small-scale developers, businesses or property owners interested in redevelopment/renovation of their property. This information could be provided as pamphlets at the planning counter and online.
20.	EA.3 EA.9	In coordination with other Oregon recreational counties, study the financial impact increased remote workers have on local housing and economic opportunities.	Partner	<ul style="list-style-type: none"> • Clatsop County chambers of commerce • OCVA • Oregon Employment Department • Business Oregon • 	1-3 years	While economists estimate that the rate of remote work has fallen significantly since the peak, there is also widespread agreement that the nature of work has permanently changed for many workers. 54% of remote workers in the Pew poll reported that they would like to continue to work remotely, and a larger majority of the respondents reported that most aspects of the transition were easy.
SHARED FINANCIAL INVESTMENTS, INCENTIVES AND INITIATIVES						
1.	EA.2 EA.3	Advance plans for community biodigester	Lead	<ul style="list-style-type: none"> • Clatsop County • Cities 	1-5 years	Establishing a MOU with a municipality, Port of Astoria

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	EA.6	to address rural housing development septic systems, and potential expansion of food processing waste streams.		<ul style="list-style-type: none"> • Port of Astoria • Septage haulers • Food processing businesses • Fermentation businesses 		and/or private biodigester company pursuing development
2.	H.3 H.4	System Development Charge (SDC) and fee waivers, reductions, financing or deferrals.	Partner	<ul style="list-style-type: none"> • Clatsop County • Cities • School districts • Special districts 	Entire planning period or consider offering for a limited period of time, such as 5 years	Reducing the cost to a developer of SDC's, permitting fees or other fees is one lever that a community has to provide financial incentives for new development. These upfront fees often come before a project is completed and producing income. With waivers or reductions, the public will lose some revenue for service provision in return for incentivizing positive development. A deferral allows the project to delay payment until completion, while financing allows the developer to pay the charges over time, usually at a low interest rate. These programs can be targeted to incentivize certain types of development

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						that meet public goals. Currently, the only SDCs charged by the County are for the Westport Sewer System
3.	EA.3 EA.4	Inventory properties that might be good opportunity sites for potential public/private catalyst projects.	Partner	<ul style="list-style-type: none"> • Clatsop County • Cities • CEDR • Col-Pac • Private property owners 	1-3 years	Public control of a property by cities, the County, TIF agency, or other public agency provides the public with a valuable incentive with which to forge a public/private deal that provides public benefits that a private development might not. Examples include incentivizing the developer to build at greater density, mixed uses, transit-oriented design, or other public facilities or services.
	HSR.7 HSR.9	Facilitate clean up and utilization of identified or suspected brownfield sites.	Partner	<ul style="list-style-type: none"> • Clatsop County • Cities • Col-Pac • Private property owners 	1-5 years	Work with appropriate agencies to identify requirements, as well as potential funding sources, to bring environmentally contaminated sites to productive use. Possible incentives include local and state tax abatement

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						programs, and surcharge-based clean up funds.
4.	H.6 HSR.3	Expand infrastructure as needed to accommodate growth	Partner	<ul style="list-style-type: none"> • Clatsop County • Cities • Special districts • Oregon Department of Transportation • Oregon Legislature 	Entire planning period	Work with the appropriate agencies to coordinate the funding of infrastructure necessary to accommodate anticipated growth, particularly in areas that are expected to intensify uses. Ensure that buildable parcels are served, and areas in the path of development can be served in a timely fashion.
5.	EA.3	Promote locally available tools such as enterprise zones, opportunity zones, tax credit programs, urban renewal funds and other resources.	Partner	<ul style="list-style-type: none"> • CEDR • Col-Pac • Cities • Clatsop County 	Entire planning period	In all site listing and marketing materials, ensure that the benefits and tools for the existing zones are mentioned where applicable.
6.	EA.3	Market and expand programs to assist emerging and under-capitalized firms.	Partner	<ul style="list-style-type: none"> • CEDR/SBDC • Local financial institutions 	Entire planning period	Technical assistance, micro loans, storefront improvement programs, master leases, and credit enhancement. Refer businesses to partnering economic development agencies, development

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						corporations, etc. as appropriate.
7.	EA.2 EA.3 EA.6	Evaluate development of small business incubator space.	Partner	<ul style="list-style-type: none"> • CEDR/SBDC • Clatsop Community College • ADHDA 	1-5 years	A shared work or incubator space, often affiliated with a college, economic development agency, or other agency, to provide space for small companies to work and collaborate in a subsidized environment while they grow. This type of space might be developed in conjunction with an urban renewal district, community college or port.
8.	EA.2 EA.3 EA.6	Evaluate development of shared fabrication space and/or “makers” collective.	Partner	<ul style="list-style-type: none"> • CEDR/SBDC • Clatsop Community College 	1-5 years	Look for opportunities to repurpose existing space to support multi-tenant maker spaces. These provide small spaces for craftspeople and artisans to work and share tools and knowledge, to incubate new businesses. This could provide support for a local economy with a diverse manufacturing space.
9.	EA.3	Tax exemptions and abatements	Partner	<ul style="list-style-type: none"> • Clatsop County • Cities 	Entire planning period or	Cities and counties are able to adopt a range of tax abatement programs

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					consider making available for a limited period of time such as 5 years	authorized by the state. Most of these programs are aimed at encouraging housing development, rather than commercial or industrial development. However, there are programs that can be applied to mixed use projects. Localities can adopt their own rules for these programs, but abatements often offer up to 10 years of tax relief, which can be a sizable benefit to a private developer. In return, the developer builds a use that meets public goals, but would not otherwise be market feasible.
10.	EA.3	Enterprise Zones	Partner	<ul style="list-style-type: none"> • CEDR • Clatsop County • City of Astoria • City of Warrenton • Port of Astoria 	Entire planning period	Clatsop County currently has an adopted Enterprise Zone, sponsored by the County and Cities of Astoria and Warrenton, and the Port of Astoria. An enterprise zone is a powerful tool to offer tax-based incentives to expanding or new employers making a sizable investment

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						in the community. Local enterprise zones develop their own program rules with qualifying businesses typically meeting some expectation of the increased property value, number and types of jobs created After investment, the business is eligible for an exemption to local property taxes for a set number of years.
11.	EA.3	Opportunity Zones	Partner	<ul style="list-style-type: none"> • Port of Astoria • City of Astoria • Clatsop County 	1-3 years unless program is extended	There is an established Opportunity Zone in the Tongue Point area of Astoria. These zones are designated economically disadvantaged areas, where medium- to long-term investments by businesses and developers may be eligible for significant tax savings. The benefit can help investors defer capital gains tax. While complex, localities can market the presence of these zones to prospective investors in the area. This program lasts until December 31, 2028, and it is

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						currently unclear if it will be extended or and/or new zones will be designated.
12.	EA.3	Regionally Significant Industrial Areas (RSIA)	Partner	<ul style="list-style-type: none"> City of Warrenton Clatsop County 	Entire planning period	The North Coast Business Park (NCBP) is one of six Regionally Significant Industrial Areas within the state. It was approved by the Economic Recovery Review Council (ERRC) as a designated RSIA on January 28, 2015. The NCBP, located in the City of Warrenton, consists of 162 acres. In 2025, the County sold its last remaining parcel in the park to a private investor. ORS 197-723(7) allows new or expanded industrial uses to utilized an expedited industrial land use permit as long as the project does not require a change to the acknowledged comprehensive plan or land use regulations.
13.	HSR.6	Research funding opportunities for continuation/expansion	Partner	<ul style="list-style-type: none"> Clatsop County Board of Commissioners COLPAC 	Entire planning period	Clatsop County participated with DLCD in an audit of its codes related to childcare

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		of local grants to daycare providers offered by the Clatsop County Childcare Retention and Expansion program.		<ul style="list-style-type: none"> • CEDR/SBDC • Columbia Pacific Coordinated Care Organization • Northwest Regional Educational Service District • 		centers between 2020-2022. LAWDUC amendments were adopted in spring 2023. In 2024, County staff participated in a statewide work group to address childcare barriers. In 2022, the Board of Commissioners created a Child Care Grant program to retain and expand child care options, with \$500,000 from Clatsop County and \$120,000 each from Columbia Memorial and Providence Seaside Hospitals.
14.	EA.2 EA.3 EA.6 EA.9 HSR.7 HSR.10	Support research into new or emerging technologies related to wastewater treatment for existing and new commercial and industrial uses, including the food and beverage processing sector in the County.	Partner	<ul style="list-style-type: none"> • Clatsop County Board of • Cities • Port of Astoria • Area septage haulers • OSU Seafood Research Center 	Entire planning period	One possible avenue of exploration is to identify ways to reduce the amount of waste generated. A program developed in Iceland seeks to achieve 100% fish utilization in Oregon . Increased utilization would not only reduce impacts to wastewater treatment systems, but would also create new jobs and revenue streams for existing businesses.

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15.	HSR.9	Evaluate assisting in wetland mitigation to increase developable land inventory, including creating or partnering in a wetland mitigation bank.	Partner	<ul style="list-style-type: none"> • Clatsop County • Cities • Col-Pac • CEDR • Department of State Lands • Private property owners 	5-10 years	Significant and non-significant wetlands are common along the Oregon Coast and can constrain new development. Costs of mitigating can be prohibitive for many developers while on-site mitigation reduces usable site area and can be difficult for a business operator to maintain over time. Mitigation banks allow for off-site mitigation. Credits at existing wetland banks are available or a local bank could be established.
POLICY AND PLANNING						
1.	H.6	Encourage infill, redevelopment and/or adaptive reuse of obsolete or underused properties along Highway corridors.	Partner	<ul style="list-style-type: none"> • Cities • CEDR • Clatsop Association of Realtors • Private property owners 	Entire planning period	Existing employment and residential space in incorporated areas and along commercial corridors may have the potential for more intensive use, accommodating more growth. More intensive development and mixed-use construction often encounter a feasibility gap between costs and end value. Common

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						approaches to bridging this gap include TIF funding, tax credit programs, tax incentives, and public/private partnerships.
2.	EA.4 EA.5	Update the Clatsop County Fairgrounds Strategic Plan to expand use and tourism opportunities related to the agricultural industries.	Partner	<ul style="list-style-type: none"> • Clatsop County Board of Commissioners • Clatsop County Fair Board • Clatsop County Community Development Department • Stakeholders 	1-2 years	The Fairgrounds strategic plan was last updated in 2009. Since that time, the way fairgrounds across the state are used has evolved. Fees should be evaluated, and new opportunities for revenue and use should be identified.
3.	H.3 H.4 H.5 H.6	Ensure the housing policies allow for an appropriate mix of housing for the local workforce.	Partner	<ul style="list-style-type: none"> • Clatsop County • Cities • DLCD • Employers • Chambers of Commerce 	Entire planning period (5-year cycles)	Provide a full range of housing types and price points to meet the needs of the full workforce and encourage residents to both live and work in the community. Encourage major employers to develop dedicated employee housing and assist with identifying possible funding sources.
4.	H.3 H.4	Support local affordable housing developers.	Partner	<ul style="list-style-type: none"> • NWOHA • Non-profit housing organizations • Clatsop County 	Entire planning period	Low-wage positions are a key component of any local economy, and most industries rely on this

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				<ul style="list-style-type: none"> Cities 		workforce either directly, or through their supporting firms. Subsidized affordable housing is one key segment of needed workforce housing.
5.	HSR.6	Prioritize childcare as a workforce readiness issue.	Partner	<ul style="list-style-type: none"> Clatsop County Childcare Retention and Expansion Program Clatsop County Cities DLCD 	Entire planning period	Childcare is a commonly identified need for working households if all adults are working, or working unusual hours, etc. This topic is increasingly raised as an important part of attracting and maintaining an available workforce. Home-based childcare businesses are also usually a category of self-employment.
6.	H.3 H.4	Expedited development review	Partner	<ul style="list-style-type: none"> Clatsop County Cities 	Entire planning period	Offer expedited review and permitting for commercial, residential or mixed-use projects that meet certain criteria (e.g., provide workforce housing, are taking advantage of other local incentives, meet job creation criteria). Expedited review allows projects to save time and money in the development phase.

Section 5: Goal Statements and Implementation Steps

	SUPPORTS GOAL #	ACTION DESCRIPTION	COUNTY ROLE	PARTNERS	TIMEFRAME	NOTES
7.	H.6 HSR.9	Update the 2015 Transportation Systems Plan to reflect updated commercial, industrial, and residential development patterns, improvements to systems resiliency, and planned expansion of transit services.	Lead	<ul style="list-style-type: none"> • Clatsop County Board of Commissioners • Clatsop County Public Works Department • Clatsop County Community Development Department • Sunset Empire Transportation District • ODOT • DLCD • Cities 	1-3 years	OAR 660-012 requires cities and counties to adopt Transportation System Plans (TSP) to “provide and encourage a safe, convenient, and economic transportation system.” The County’s TSP was last updated in 2015. County staff applied for grant funding in FY 24/25 to update the TSP, but was not awarded. In the intervening 10 years, significant development has occurred within incorporated and unincorporated Clatsop County, necessitating an update of the TSP to plan and support future roadway infrastructure, which in turn supports the County’s economic development efforts.
8.	All Goal Statements	Review and update comprehensive plan to support economic development and housing goals	Lead	<ul style="list-style-type: none"> • Clatsop County Board of Commissioners • Clatsop County Planning Commission • DLCD • County staff 	Entire planning period (5-year cycles)	Policies in the comprehensive plan related to housing and employment should be kept up to date to ensure that it reflects the community’s latest goals and initiatives, as

Section 5: Goal Statements and Implementation Steps

	SUPPORTS GOAL #	ACTION DESCRIPTION	COUNTY ROLE	PARTNERS	TIMEFRAME	NOTES
				<ul style="list-style-type: none"> Public 		well as changes to state laws. The adopted plan provides the underlying support for the County’s planning efforts. The comprehensive plan should reflect the community’s latest economic development objectives, identified target industries, workforce, housing, and other initiatives.
9.	EA.1 EA.2 EA.3 EA.4 EA.5 EA.6 EA.7 EA.8	Ensure that applicable comprehensive plan designations and zoning allow the mix of uses sought in commercial and industrial areas, and if necessary, limit those uses that don’t contribute to goals.	Lead	<ul style="list-style-type: none"> Clatsop County Board of Commissioners Clatsop County Planning Commission DLCD County staff Public 	Entire planning period (5-year cycles)	An early step in bringing about the economic development vision is to ensure that the desired zones are in place and permit the uses that are foreseen for the area. Segments of the highway corridors may be planned for retail, office, industrial, residential, or some mix of these uses. Where current zoning does not match the vision, consider rezoning, or amending zone standards.
10.	H.1	Review the funding sources and potential need for a multi-	Lead/Partner	<ul style="list-style-type: none"> Clatsop County Board of Commissioners Cities 	1-5 years	In order to react quickly to potential economic development proposals, a

Section 5: Goal Statements and Implementation Steps

	SUPPORTS GOAL #	ACTION DESCRIPTION	COUNTY ROLE	PARTNERS	TIMEFRAME	NOTES
		jurisdictional Permit Advocate Position for residential, commercial, and industrial development.		<ul style="list-style-type: none"> • CEDR • Local planning staff • Clatsop County chambers of commerce • Local contractors • Public 		team of on-call financing, land use and economic development professionals should be assembled. Day-to-day staff may not have the expertise or time to react to these proposals, which could result in missed opportunities.
11.	EA.3 H.3 H.4	Continue to improve and streamline development regulations and review processes where possible, to reduce cost and time, and provide predictability	Lead	<ul style="list-style-type: none"> • Clatsop County Board of Commissioners • Clatsop County Planning Commission • County staff • Local contractors • Public 	Entire planning period (5 year cycles)	The county should work to be development and employer friendly to encourage employment growth, new and expanding businesses, and real estate development. In real estate development, waiting periods and uncertainty bring additional costs, as funds are commonly tied up during the process, and loan payments are made.
12.	EA.1 EA.2 EA.3	Adopt code revisions that reduce review times for commercial redevelopment or tenant conversions to assist business owners moving into previously	Lead	<ul style="list-style-type: none"> • Clatsop County Board of Commissioners • Clatsop County Planning Commission • County staff • Stakeholders • Public 	Entire planning period	These types of conversions currently require conditional use permits.

Section 5: Goal Statements and Implementation Steps

	SUPPORTS GOAL #	ACTION DESCRIPTION	COUNTY ROLE	PARTNERS	TIMEFRAME	NOTES
		occupied tenant spaces.				
13.	EA.1 EA.2 EA.3 EA.4 EA.5 EA.6 EA.7	Require organizations receiving economic development funding from Clatsop County exceeding \$10,000 to annual track and report to the County the total number of jobs created, jobs saved, and tax base generated	Lead/Partner	<ul style="list-style-type: none"> Clatsop County Board of Commissioners Funding recipients 	Entire planning period	As the County enters into a period of tighter fiscal constraints due to factors outside of its control, a higher level of transparency and accountability will be required for all expenses and support to outside agencies. Organizations receiving funding from the County for economic development activities are a vital partner in the County’s economic development plans. As such, each agency should be required to demonstrate the tangible impact of their efforts and county funding.

Appendix A: Community Questionnaire Summary and Results

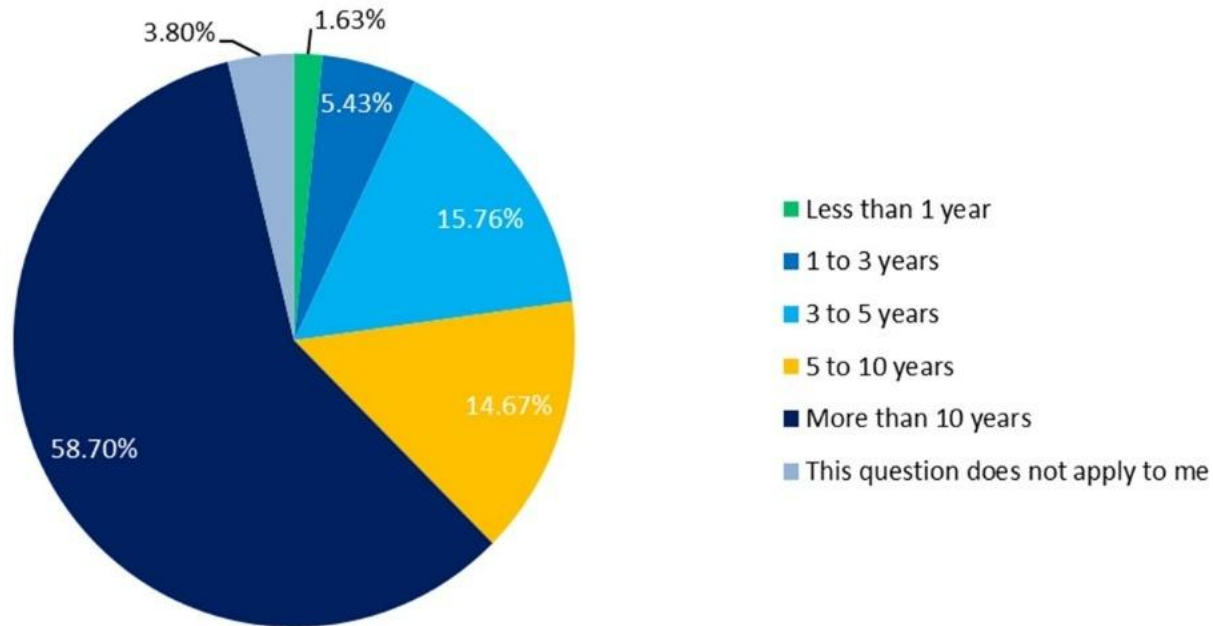


Wauna Mill Source: The Daily News



Clatsop County EOA - Public Questionnaire Results

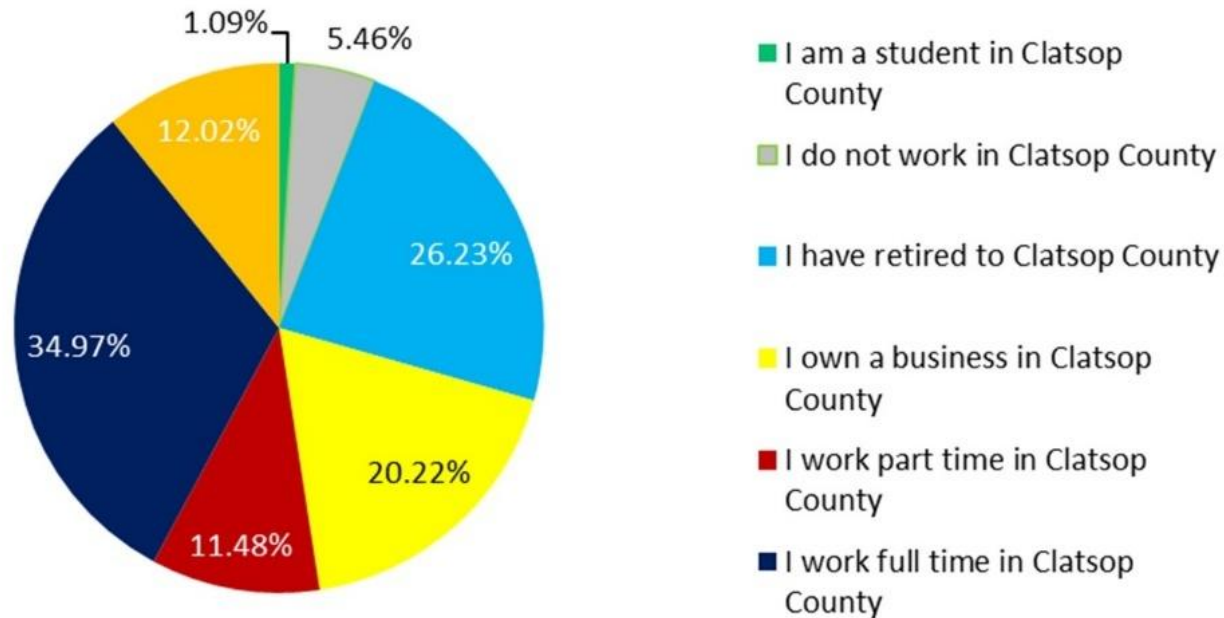
If you live in Clatsop County how long have you been a resident?



Clatsop County EOA - Public Questionnaire Results



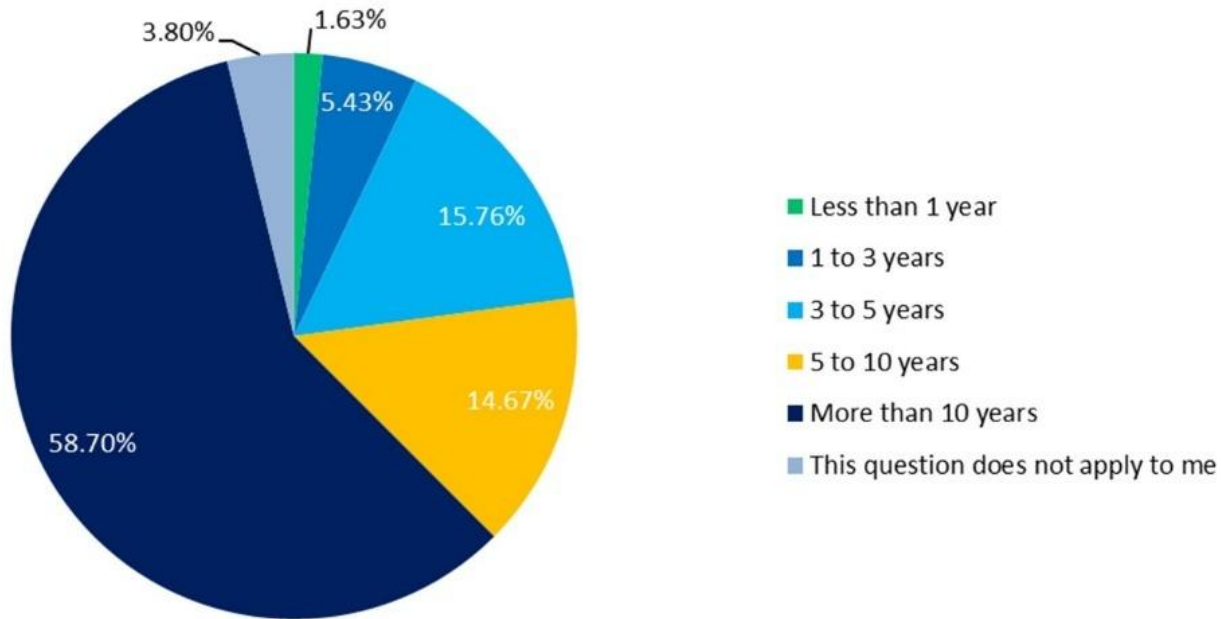
Which of the following statement applies to you?





Clatsop County EOA - Public Questionnaire Results

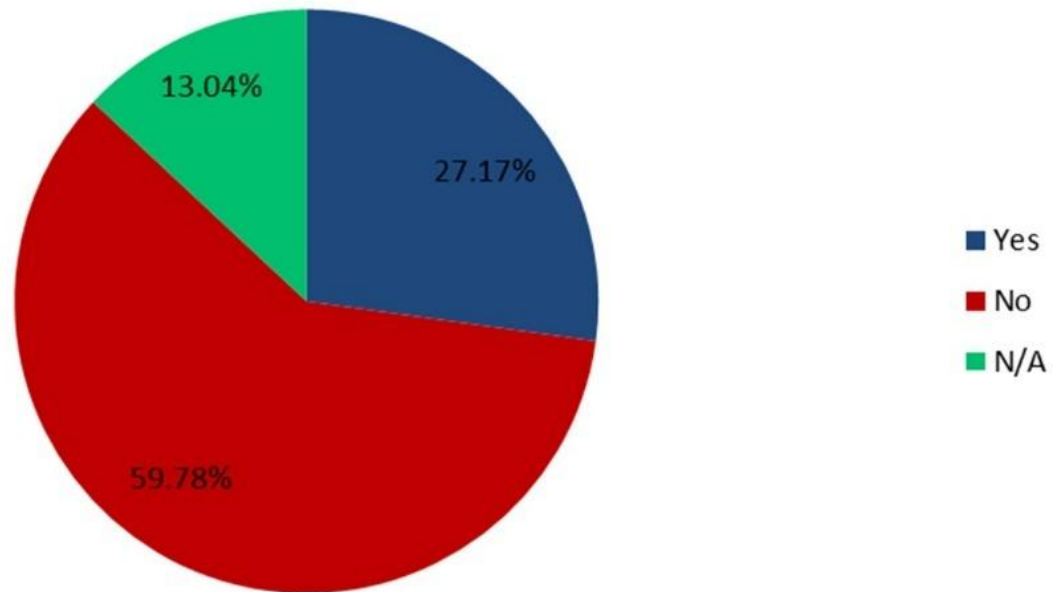
If you live in Clatsop County how long have you been a resident?



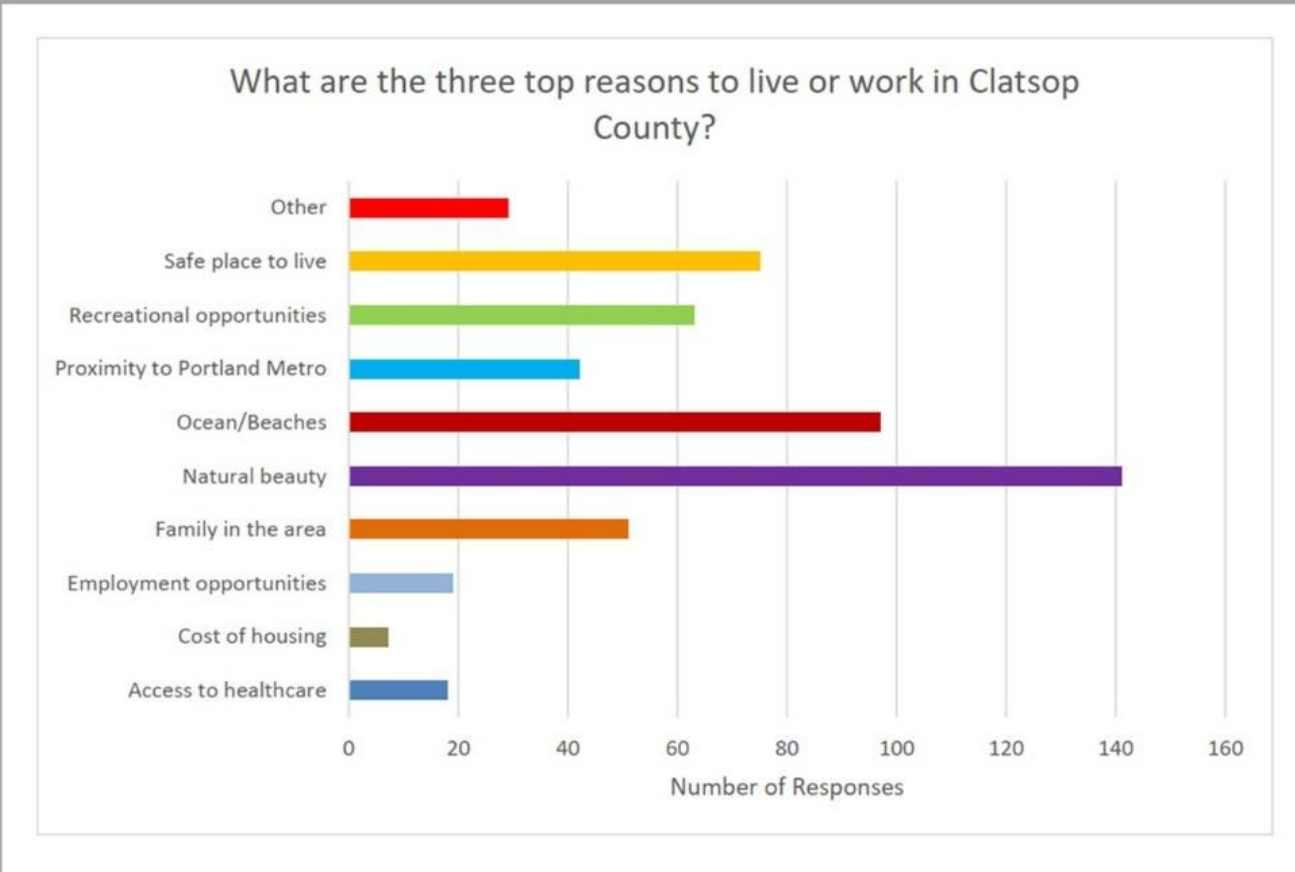
Clatsop County EOA - Public Questionnaire Results



Do you work from home?



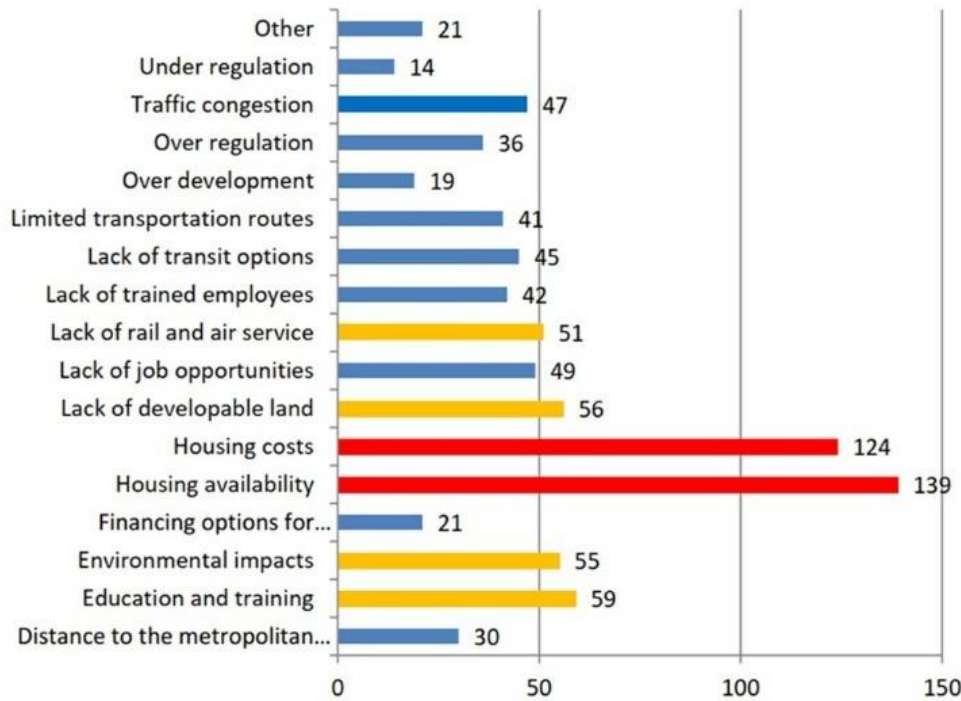
Clatsop County EOA - Public Questionnaire Results



Clatsop County EOA - Public Questionnaire Results



What do you see as challenges to the future economic health of Clatsop County? Pick up to five challenges.

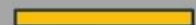


Response

First Tier



Second Tier

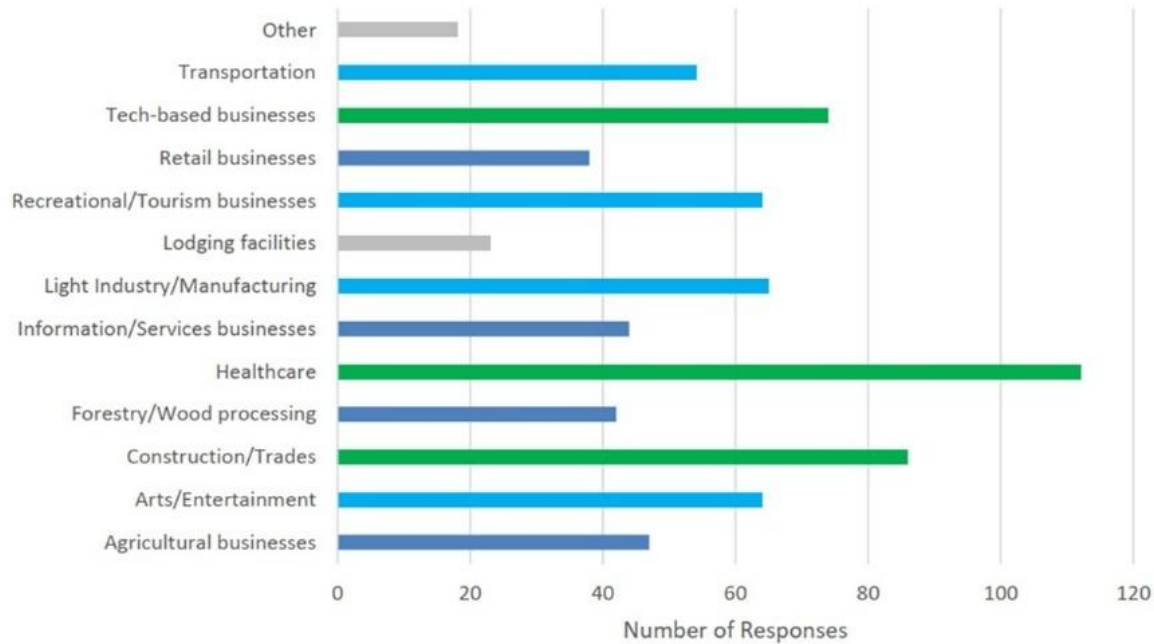


Appendix A: Community Questionnaire Summary and Results

Clatsop County EOA - Public Questionnaire Results



What general categories of businesses should Clatsop County encourage to locate or expand in the area. Select up to five.



Response

First Tier 
Second Tier 

Appendix B: Vacant and Redevelopable Lands Analysis



Hampton Lumber Source: Oregon Business Industry

Appendix B: Vacant and Redevelopable Lands Analysis

Clatsop County Redevelopment Lands Analysis - Commercial													
MapTaxlot	Entire Taxlot Acres	Zone	Acres Within Zone	Improvement AV Sum	Land AV Sum	Improvement AV Percentage of Land AV	Value less than 30%	Commercial Parcel > 1 acre and Value <30%	Commercial Parcel > 5 acres and < 1/2 acre developed	Industrial Parcel > 2 acres and Value <30%	Industrial Parcel > 5 acres and < 1/2 acre developed	Constrained Characteristic	Redevelopment Acres
40704AD00700	6.96	TC	6.11	\$ 705,077	\$ 168,587	418%	No	No	No			Wetlands	0.00
51004DD00900	3.22	GC	3.22	\$ 1,533,825	\$ 175,286	875%	No	No	No				0.00
71022B001200	1.04	NC	1.04	\$ 27,042	\$ 151,172	18%	Yes	Yes	No			None	1.04
50731DC00400	5.10	TC	5.10	\$ 301,779	\$ 109,810	275%	No	No	No				0.00
41030BB00402	1.54	RCC	1.54	\$ 705,469	\$ 155,524	454%	No	No	No				0.00
806260003700	1.34	GC	1.34	\$ 215,084	\$ 27,156	792%	No	No	No				0.00
80627DA00200	18.76	GC	1.25	\$ 116,317	\$ 73,090	159%	No	No	No				0.00
80627DA00400	1.20	GC	1.20	\$ 48,069	\$ 56,527	85%	No	No	No				0.00
80930AD00700	1.57	RCC	1.57	\$ 674,612	\$ 385,628	175%	No	No	No				0.00
508250000300	6.00	TC	5.81	\$ 107,416	\$ 91,400	118%	No	No	No				0.00
80930AD00203	1.26	RCC	1.26	\$ 38,508	\$ 48,426	80%	No	No	No				0.00
80930AD00301	2.50	RCC	2.50	\$ 3,285	\$ 610,837	1%	Yes	Yes	No			Flood Plain	0.00
70911D000300	1.90	NC	0.35	\$ 39,072	\$ 69,561	56%	No	No	No				0.00
80930AA00600	1.88	RCC	1.88	\$ 197,193	\$ 120,967	163%	No	No	No				0.00
80824AD00500	2.50	GC	0.91	\$ 254,474	\$ 114,143	223%	No	No	No				0.00
80919DD00900	10.38	RCC	2.96	\$ 236,816	\$ 19,939	1188%	No	No	No				0.00
71015BC00600	1.00	NC	0.01	\$ 141,918	\$ 81,585	174%	No	No	No				0.00
51004DD00200	2.48	GC	2.48	\$ 184,913	\$ 225,542	82%	No	No	No				0.00
80822AC00201	1.00	RCC	0.95	\$ 116,417	\$ 72,196	161%	No	No	No				0.00
80929BB00302	1.88	RCC	0.44	\$ 76,820	\$ 67,372	114%	No	No	No				0.00
80924B001400	5.74	GC	0.76	\$ 196,438	\$ 64,136	306%	No	No	No				0.00
50917DC00700	2.59	TC	0.15	\$ 64,480	\$ 66,054	98%	No	No	No				0.00
507310000301	19.03	TC	3.80	\$ 42,774	\$ 110,302	39%	No	No	Yes			None	3.80
509230000402	1.96	TC	1.57	\$ 183,897	\$ 23,912	769%	No	No	No				0.00
51004DD00800	5.80	GC	5.80	\$ 1,332,648	\$ 417,450	319%	No	No	No				0.00
51004D001600	3.62	GC	3.62	\$ 172,603	\$ 262,437	66%	No	No	No				0.00
509230001300	2.42	TC	2.42	\$ 84,573	\$ 33,829	250%	No	No	No				0.00
51004DD01000	1.90	GC	1.90	\$ 132,755	\$ 71,398	186%	No	No	No				0.00
71015BC00700	1.09	NC	0.01	\$ 207,113	\$ 83,430	248%	No	No	No				0.00
80930AD00900	2.23	RCC	2.23	\$ 96,045	\$ 257,775	37%	No	No	No				0.00
809300001008	10.87	RCC	10.29	\$ 557,693	\$ 1,168,386	48%	No	No	No				0.00
80627DA00500	3.05	GC	3.05	\$ 87,476	\$ 47,981	182%	No	No	No				0.00

Appendix B: Vacant and Redevelopable Lands Analysis

Clatsop County Redevelopment Lands Analysis - Commercial													
MapTaxlot	Entire Taxlot Acres	Zone	Acres Within Zone	Improvement AV Sum	Land AV Sum	Improvement AV Percentage of Land AV	Value less than 30%	Commercial Parcel > 1 acre and Value <30%	Commercial Parcel > 5 acres and < 1/2 acre developed	Industrial Parcel > 2 acres and Value <30%	Industrial Parcel > 5 acres and < 1/2 acre developed	Constrained Characteristic	Redevelopment Acres
80930BD00511	1.95	RCC	1.95	\$ 76,314	\$ 68,886	111%	No	No	No				0.00
507110000100	0.34	GC	0.34		\$ -		Yes	No	No			Undevelopable portion of Split Zone Lot	0.00
50712B000100	53.49	GC	0.87	\$ 158,538	\$ 91,518	173%	No	No	No			Undevelopable portion of Split Zone Lot	0.00
80930AA00901	1.09	RCC	0.78	\$ 114,710	\$ 96,210	119%	No	No	No				0.00
407060000500	11.03	TC	11.03	\$ 68,739	\$ 198,334	35%	No	No	Yes			Residential Use	11.03
80930AA01000	1.80	RCC	1.28	\$ 289,028	\$ 352,635	82%	No	No	No				0.00
80930AB00900	4.02	RCC	4.02	\$ 548,563	\$ 220,787	248%	No	No	No				0.00
80930AB01100	2.78	RCC	2.78	\$ 68,113	\$ 290,015	23%	Yes	Yes	No			Flood Plain/Wetlands	0.00
51004D002415	1.31	GC	0.20	\$ -	\$ 8,369	0%	Yes	Yes	No			Undevelopable portion of Split Zone Lot	0.00
407040002100	2.28	TC	2.28	\$ 5,057	\$ 183,363	3%	Yes	Yes	No			Manufactured Home Use	2.28
50921B001000	1.88	TC	1.88	\$ 111,038	\$ 72,224	154%	No	No	No				0.00
80930AB00500	1.19	RCC	1.19	\$ 91,961	\$ 71,671	128%	No	No	No				0.00
70911D000900	1.01	NC	0.65	\$ 95,050	\$ 35,212	270%	No	No	No				0.00
51004D001400	4.95	GC	4.95	\$ 334,632	\$ 289,876	115%	No	No	No				0.00
80919DD01000	3.43	RCC	2.83	\$ 123,415	\$ 109,136	113%	No	No	No				0.00
40704AD00400	7.40	TC	0.20	\$ 84,784	\$ 116,583	73%	No	No	No				0.00
71015BC00400	5.72	NC	5.13	\$ 266,197	\$ 80,896	329%	No	No	Yes				0.00
80930AC02101	1.38	RCC	1.38	\$ 218,869	\$ 122,927	178%	No	No	No				0.00
50917DC00800	1.01	TC	1.01	\$ 12,151	\$ 21,391	57%	No	No	No				0.00
50917DC00900	1.59	TC	1.57	\$ 5,907	\$ 45,932	13%	Yes	Yes	No			None	1.59
80930AC02100	1.36	RCC	1.36	\$ 140,329	\$ 102,571	137%	No	No	No				0.00
508250000301	7.91	TC	2.99	\$ 969,041	\$ 87,272	1110%	No	No	No				0.00
508250000700	17.63	TC	4.73	\$ 115,912	\$ 105,397	110%	No	No	No				0.00
80930AB00402	1.34	RCC	1.34	\$ 351,955	\$ 102,260	344%	No	No	No				0.00
50921B000100	12.00	TC	4.25	\$ 33,949	\$ 195,137	17%	Yes	Yes	No			Residential Use	4.25
51004DD01700	1.19	GC	1.19	\$ 214,147	\$ 118,688	180%	No	No	No				0.00
71009DC03300	5.00	TC	4.95	\$ 158,167	\$ 339,022	47%	No	No	No				0.00
80822AC00100	1.18	RCC	1.18	\$ 147,302	\$ 93,850	157%	No	No	No				0.00
80924BC01500	1.55	GC	1.55	\$ 124,940	\$ 38,162	327%	No	No	No				0.00
80930BD00400	1.52	RCC	1.52	\$ 695,286	\$ 56,307	1235%	No	No	No				0.00
50920A000400	3.15	TC	1.22	\$ 130,853	\$ 79,605	164%	No	No	No				0.00
80919AD00900	1.99	RCC	1.99	\$ 920,126	\$ 88,759	1037%	No	No	No				0.00
													5.84

Appendix B: Vacant and Redevelopable Lands Analysis

Clatsop County Redevelopment Lands Analysis - Industrial													
MapTaxlot	Entire Taxlot Acres	Zone	Acres Within Zone	Improvement AV Sum	Land AV Sum	Improvement AV Percentage of Land AV	Value less than 30%	Commercial Parcel > 1 acre and Value <30%	Commercial Parcel > 5 acres and < 1/2 acre	Industrial Parcel > 2 acres and Value	Industrial Parcel > 5 acres and < 1/2 acre	Constrained Characteristic	Redevelopment Acres
80720AA02800	3.54	RCC-LI	3.53	\$ 245,896	\$ 215,939	114%	No			No	No		0.00
80919DD01100	3.25	RCI	3.25	\$ 425,357	\$ 664,925	64%	No			No	No		0.00
80929BB00100	6.20	RCI	6.20	\$ 50,919	\$ 321,472	16%	Yes			Yes	Yes	Floodplain/Right-of-way	0.00
51014CA01000	2.07	QM	1.56	\$ 79,113	\$ 67,161	118%	No			No	No		0.00
51014CA00800	8.57	QM	7.30	\$ 54,581	\$ 135,048	40%	No			No	No	Quarry Entrance	0.00
807100001601	3.48	LI	3.46	\$ 319,381	\$ 42,932	744%	No			No	No		0.00
80720B001600	2.03	RCC-LI	2.03	\$ 17,878	\$ 28,626	62%	No			No	No		0.00
709120000400	3.39	LI	3.37	\$ 471,552	\$ 36,043	1308%	No			No	No		0.00
806260000200	6.12	HI	6.08	\$ 54,094	\$ 85,911	63%	No			No	No		0.00
80626CB00300	7.43	HI	5.65	\$ 41,544	\$ 109,790	38%	No			No	No		0.00
806220000100	542.90	HI	257.90	\$ 489,973,900	\$ 24,768,947	1978%	No			No	No		0.00
80930AA00102	2.81	RCI	2.81	\$ 423,229	\$ 67,276	629%	No			No	No		0.00
51004A000200	14.36	QM	14.36	\$ 2,776	\$ 138,739	2%	Yes			Yes	No	Quarry Site	0.00
51004A001400	5.36	QM	5.36	\$ 136,893	\$ 88,629	154%	No			No	No	Quarry Site	0.00
51004D000101	2.06	QM	2.06	\$ 235,319	\$ 28,364	830%	No			No	No	Quarry Site	0.00
507110000100	141.11	LI	41.06	\$ 113,682	\$ 95,031	120%	No			No	No		0.00
80919DD00300	3.24	RCI	3.22	\$ 463,269	\$ 497,392	93%	No			No	No		0.00
80720B003000	5.87	RCC-LI	5.87	\$ 1,655,115	\$ 133,042	1244%	No			No	No		0.00
80720B002200	2.40	RCC-LI	2.40	\$ 319,394	\$ 125,323	255%	No			No	No		0.00
806360000409	29.34	HI	25.19	\$ 363,550	\$ 178,190	204%	No			No	Yes	Wetlands Flood Zone Access	0.00
81033A000900	4.12	LI	4.10	\$ 45,925	\$ 106,498	43%	No			No	No		0.00
80930AA00104	3.51	RCI	3.51	\$ 329,242	\$ 108,894	302%	No			No	No		0.00
80636CD00500	9.19	RCC-LI	9.19	\$ 2,036,104	\$ 117,616	1731%	No			No	No		0.00

Industrial Redevelopment Land
0.00

Appendix B: Vacant and Redevelopable Lands Analysis

Limiting Factor Maps

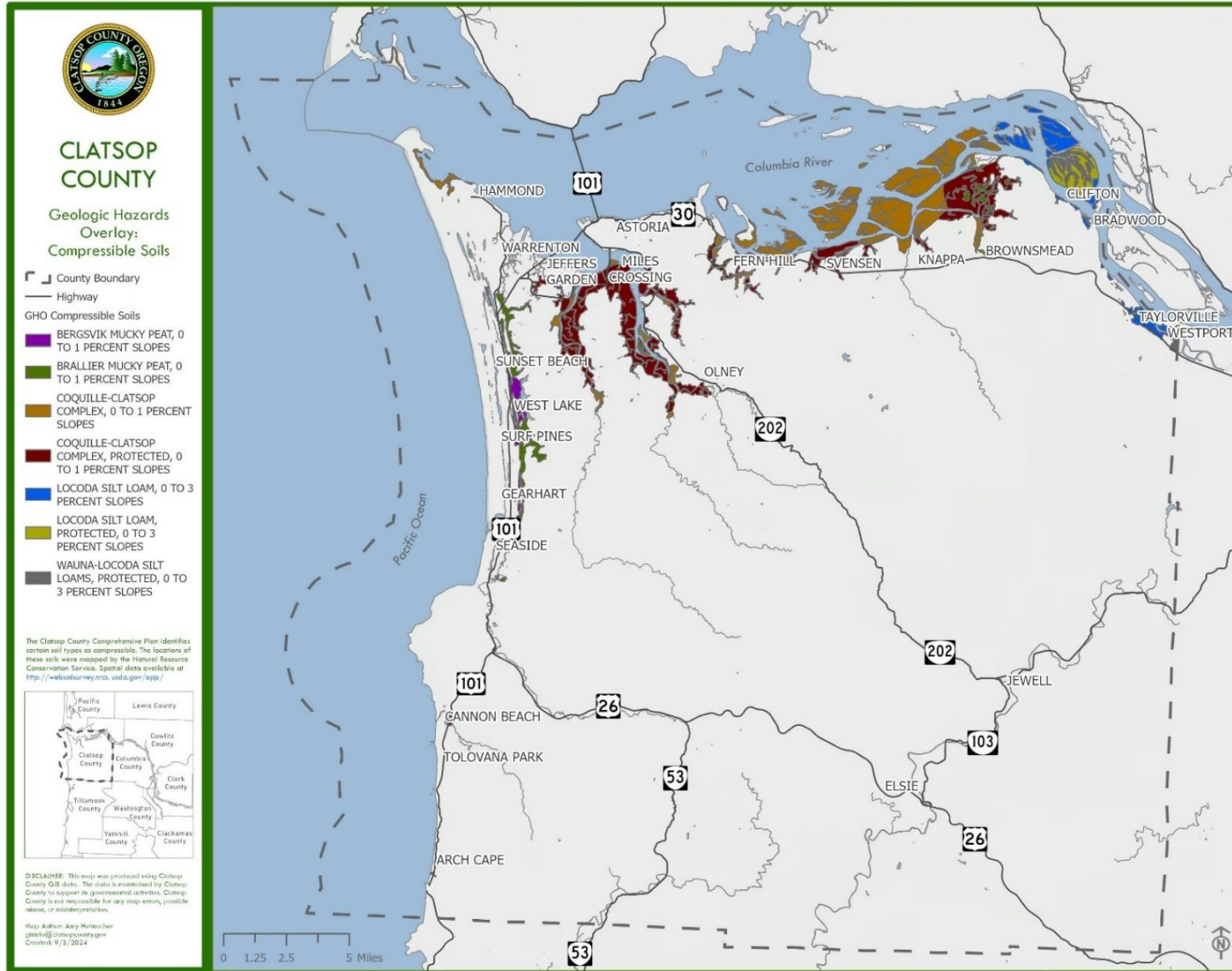
Map B-1. NWI Wetlands Map



Appendix B: Vacant and Redevelopable Lands Analysis

Limiting Factor Maps

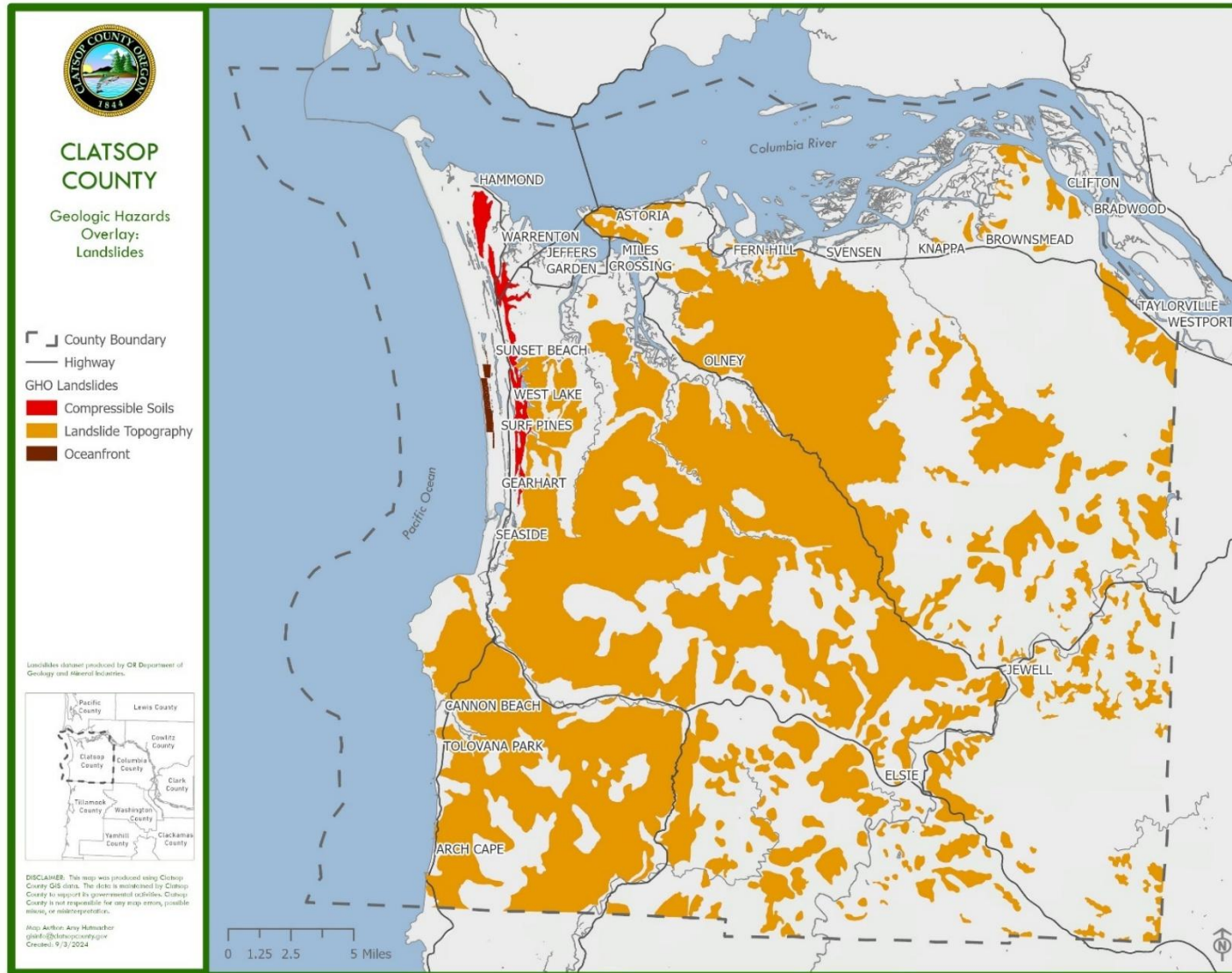
Map B-2. Compressible Soils Map



Appendix B: Vacant and Redevelopable Lands Analysis

Limiting Factor Maps:

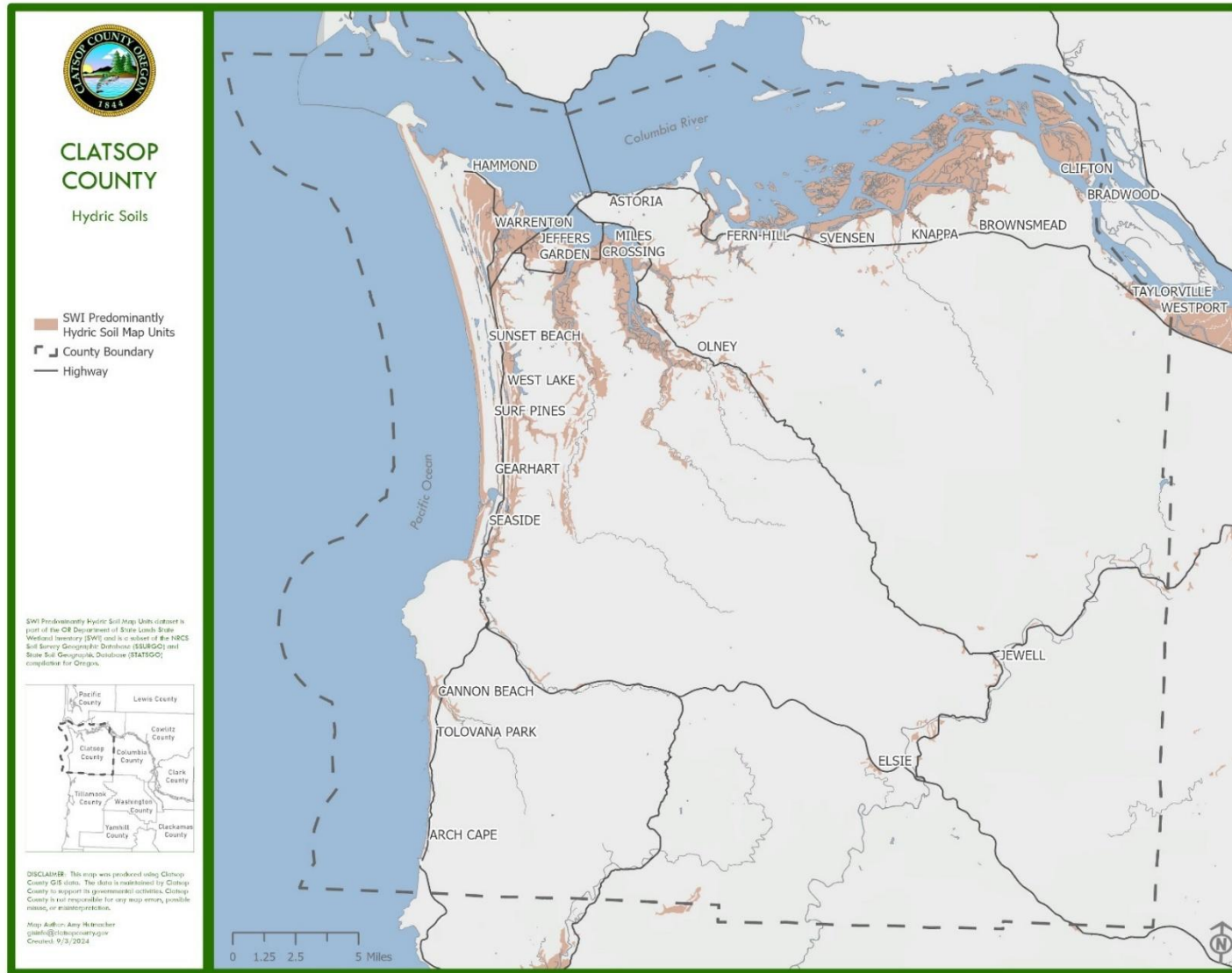
Map B-3. GHO Landslides Map



Appendix B: Vacant and Redevelopable Lands Analysis

Limiting Factor Maps:

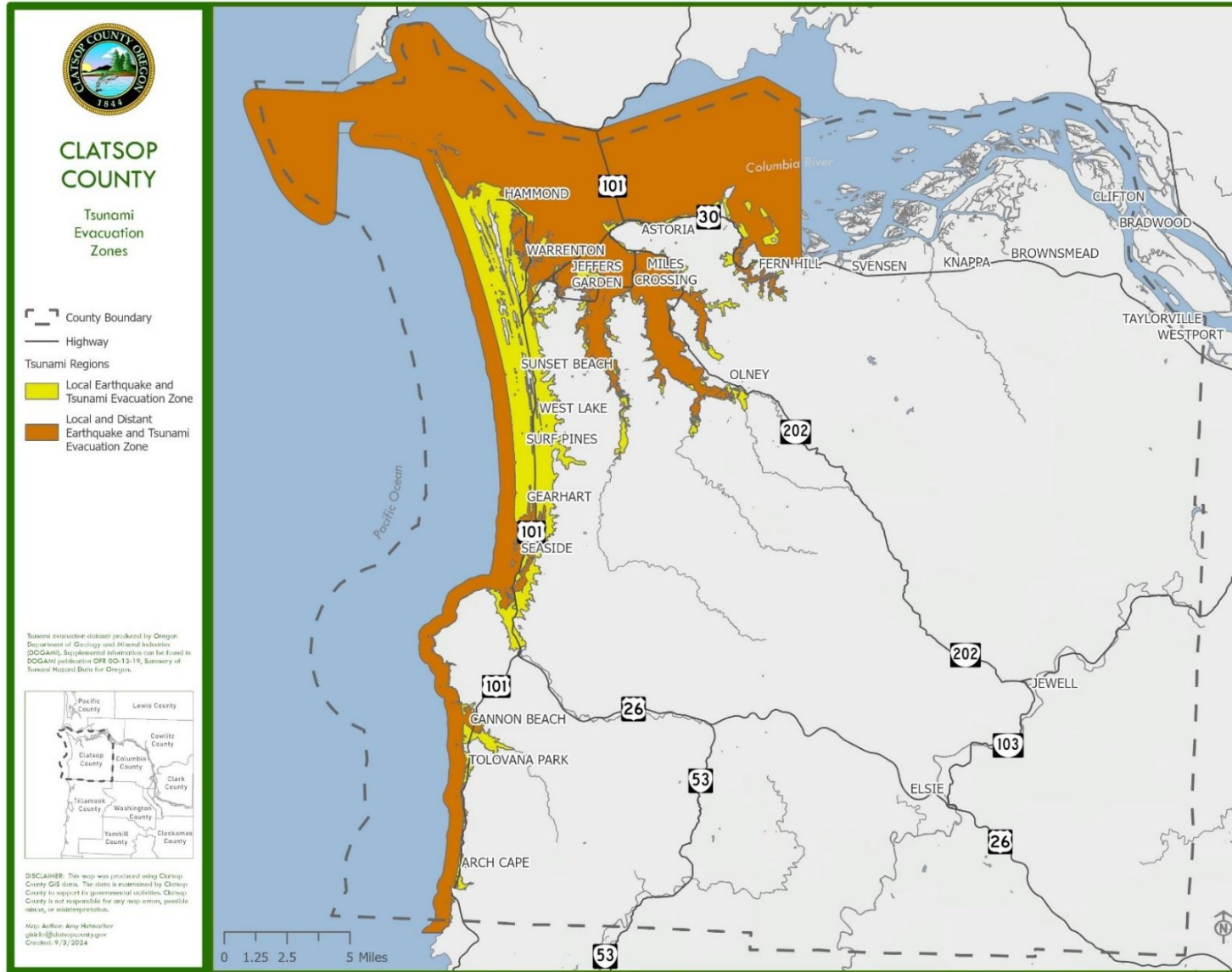
Map B-4. Hydric Soils Map



Appendix B: Vacant and Redevelopable Lands Analysis

Limiting Factor Maps:

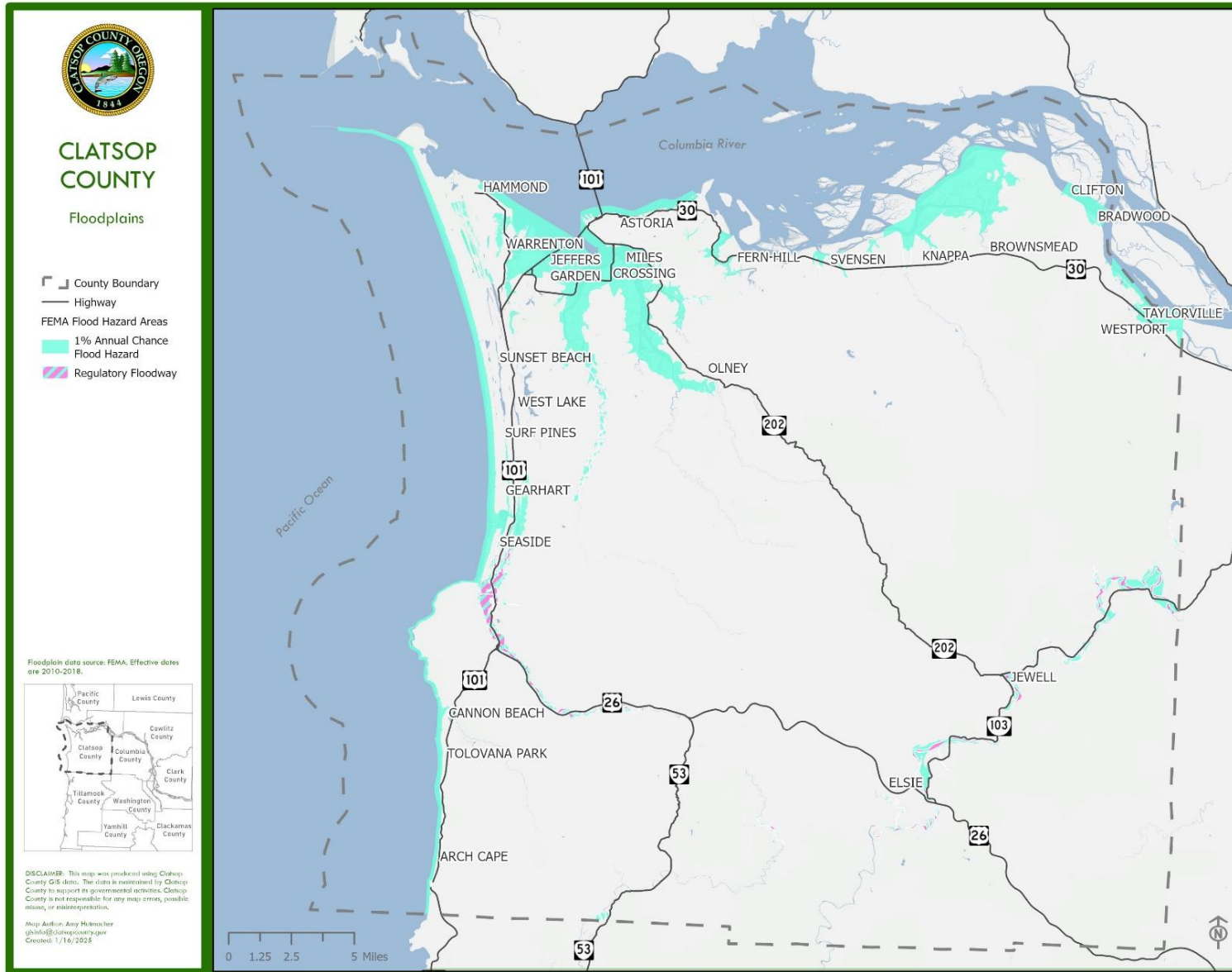
Map B-5. Tsunami Evacuation Zones Map



Appendix B: Vacant and Redevelopable Lands Analysis

Limiting Factor Maps:

Map B-6. FEMA Flood Plain Map



Appendix B: Vacant and Redevelopable Lands Analysis

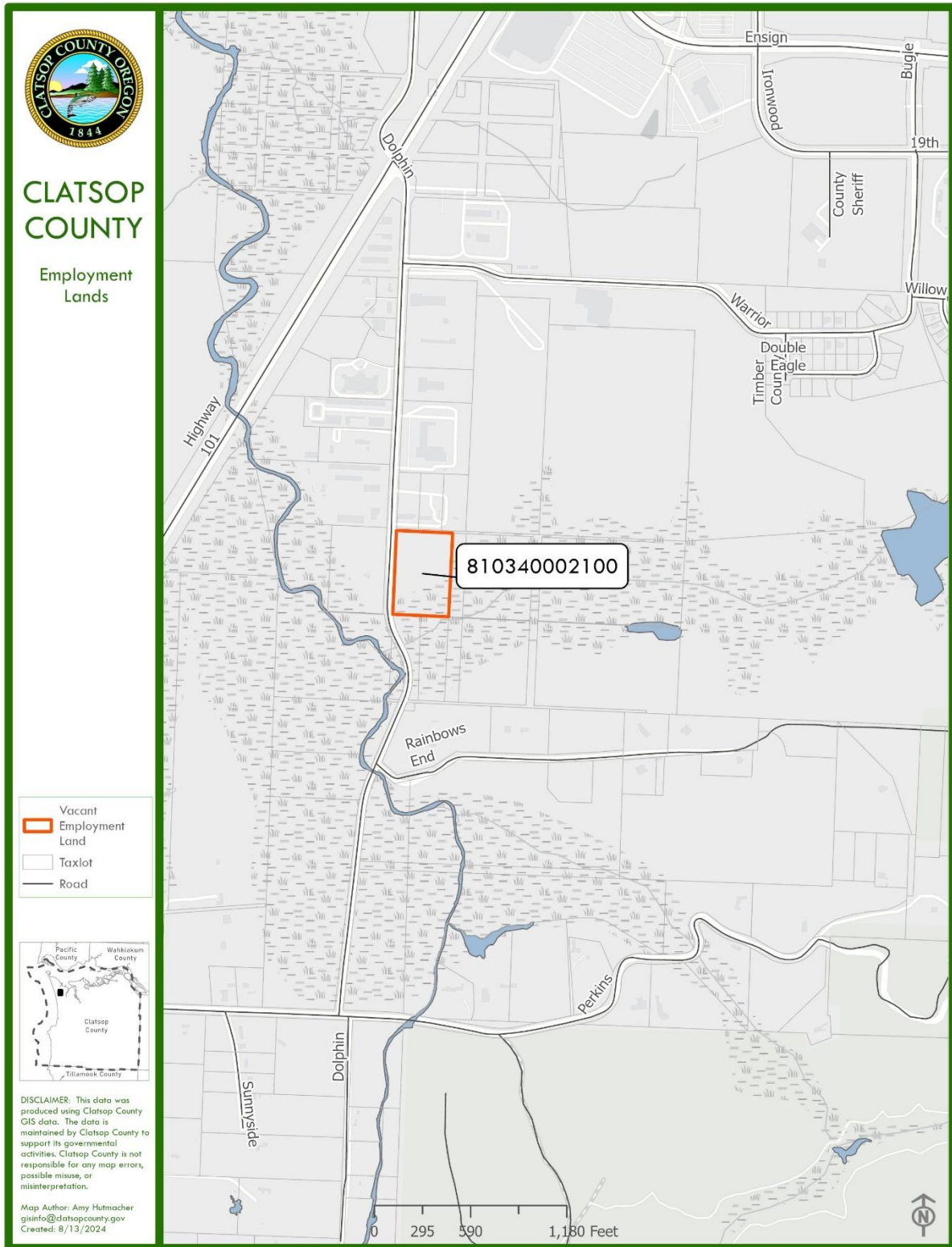
Employment Lands

Map B-7. County Wide Map



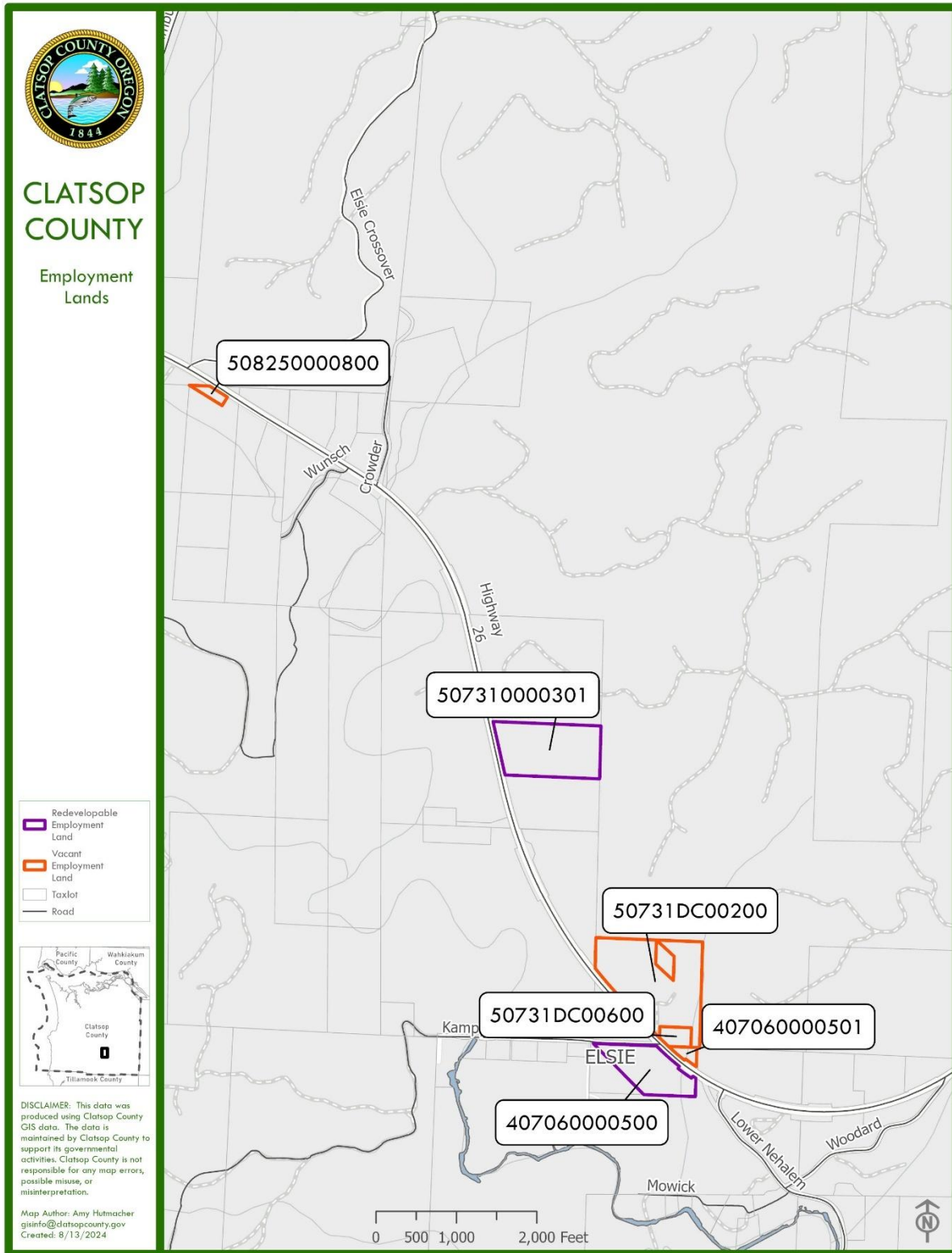
Appendix B: Vacant and Redevelopable Lands Analysis

Employment Lands Map B-8



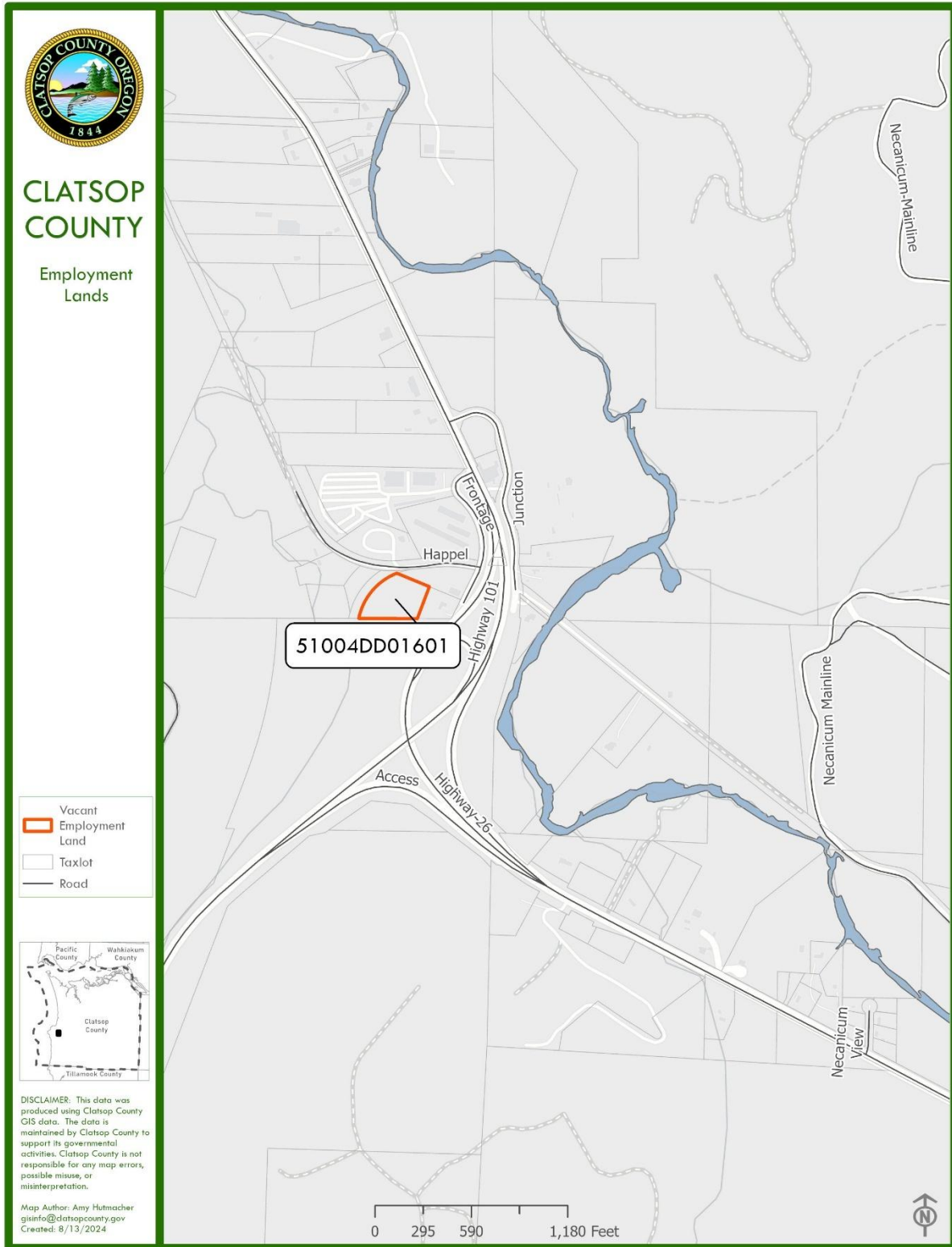
Appendix B: Vacant and Redevelopable Lands Analysis

Employment Lands Map B-9



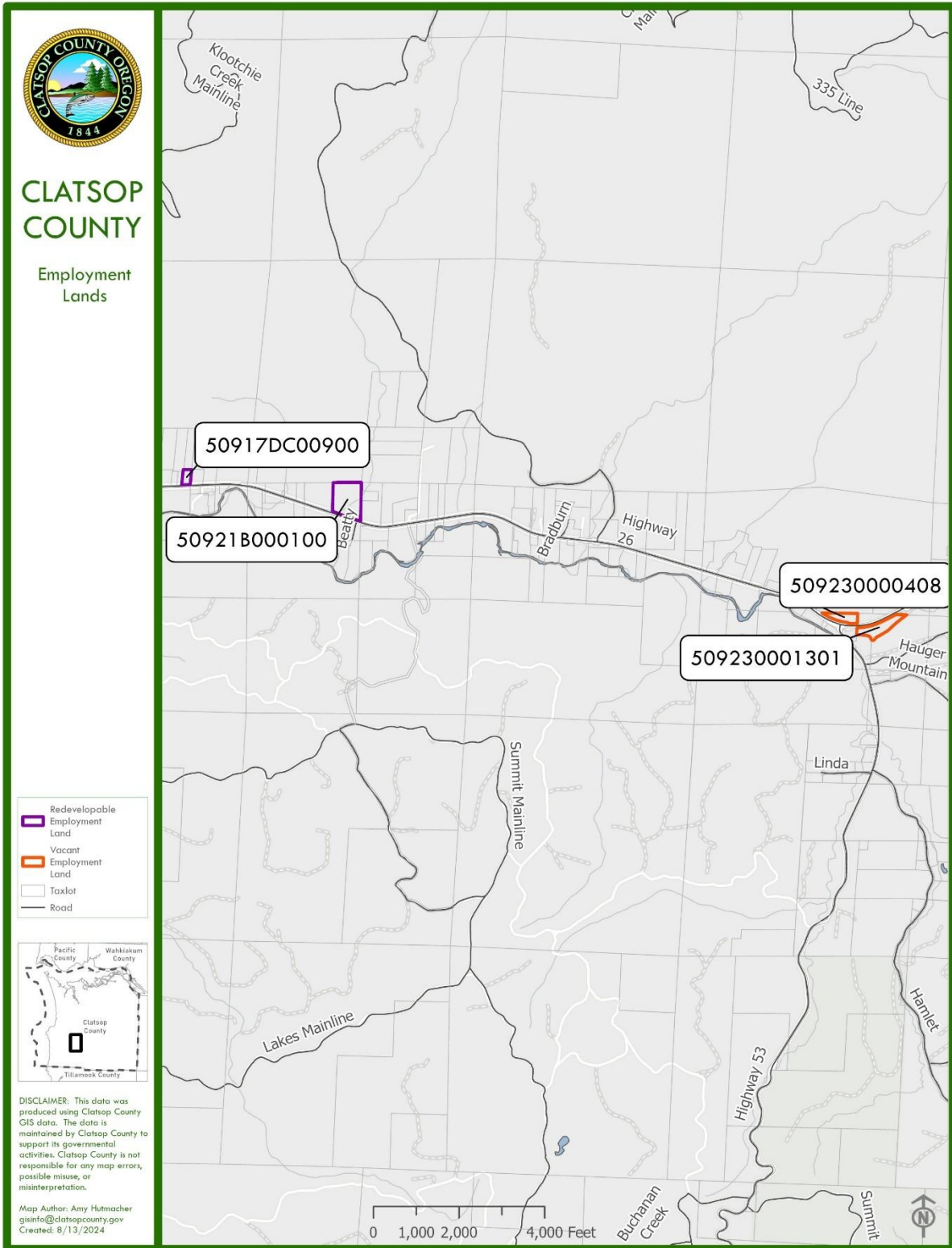
Appendix B: Vacant and Redevelopable Lands Analysis

Employment Lands Map B-10



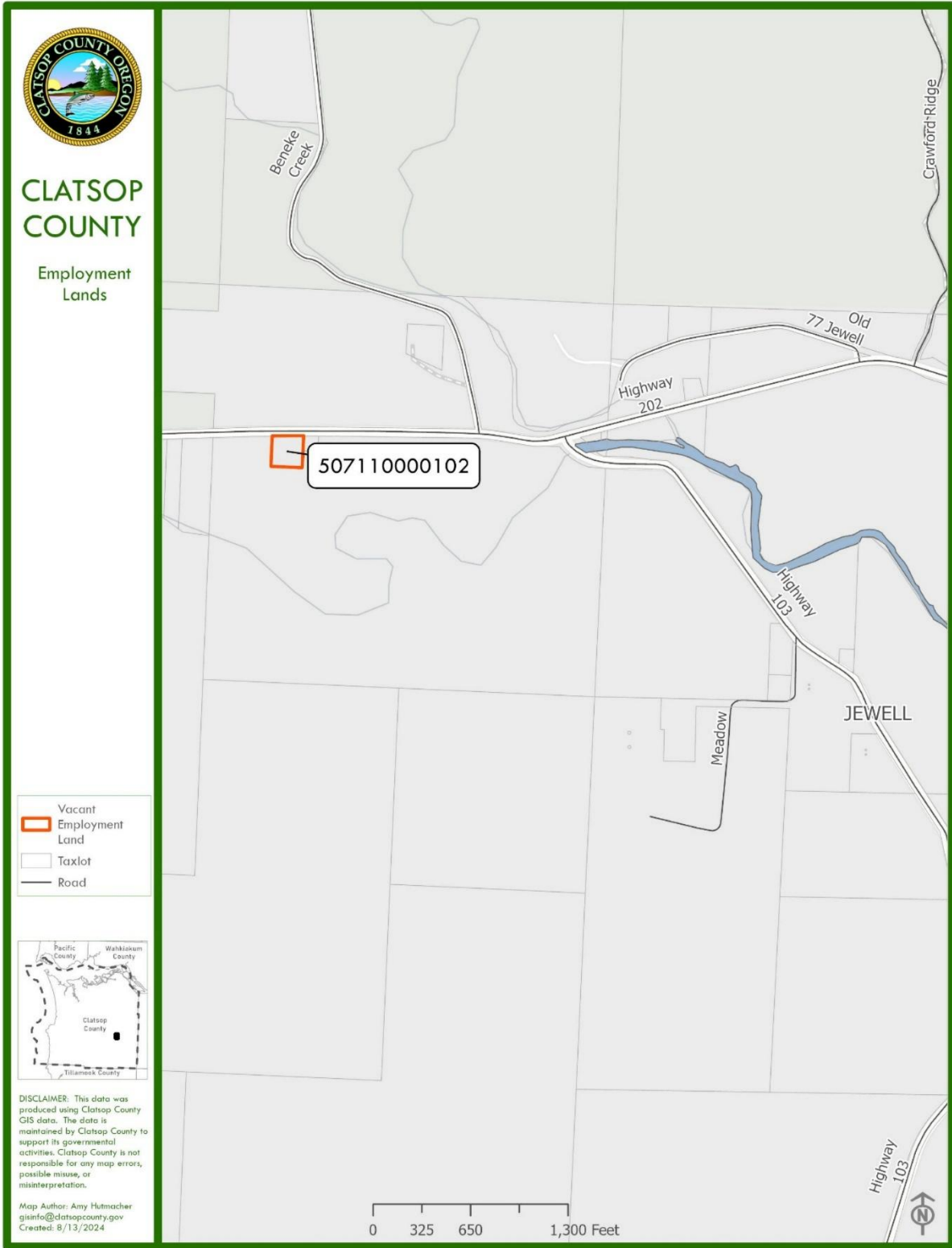
Appendix B: Vacant and Redevelopable Lands Analysis

Employment Lands Map B-11



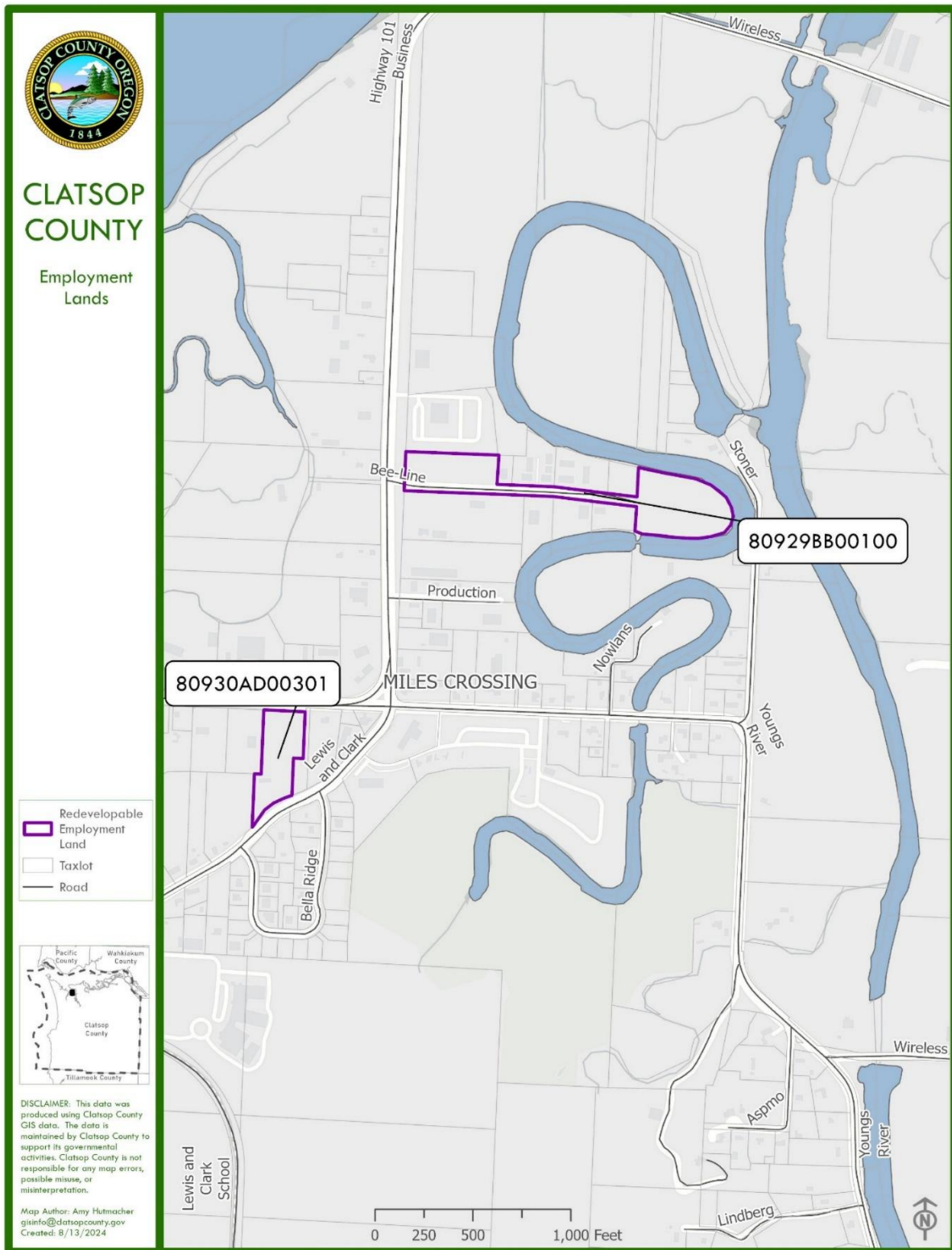
Appendix B: Vacant and Redevelopable Lands Analysis

Employment Lands Map B-12



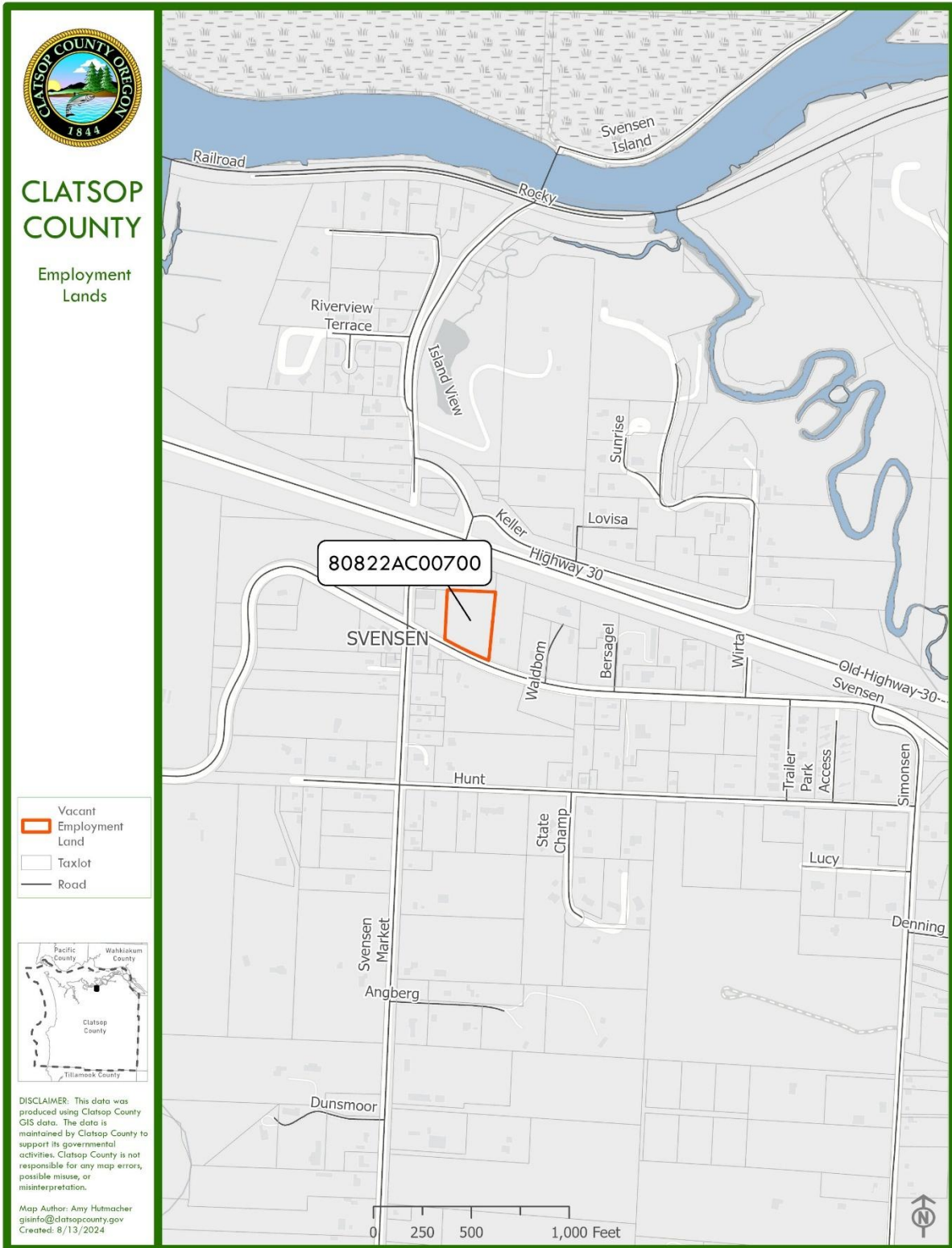
Appendix B: Vacant and Redevelopable Lands Analysis

Employment Lands Map B-14



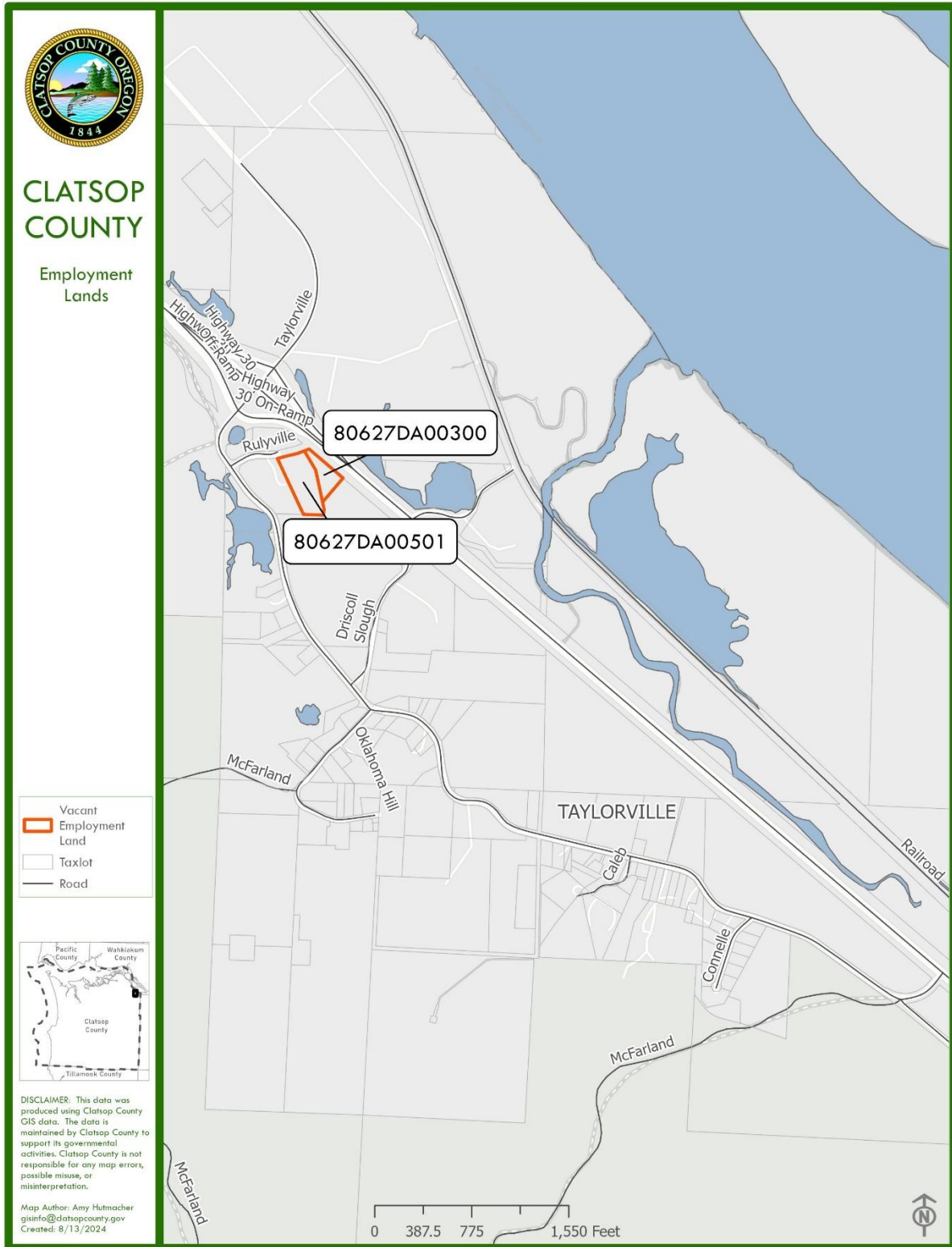
Appendix B: Vacant and Redevelopable Lands Analysis

Employment Lands Map B-15



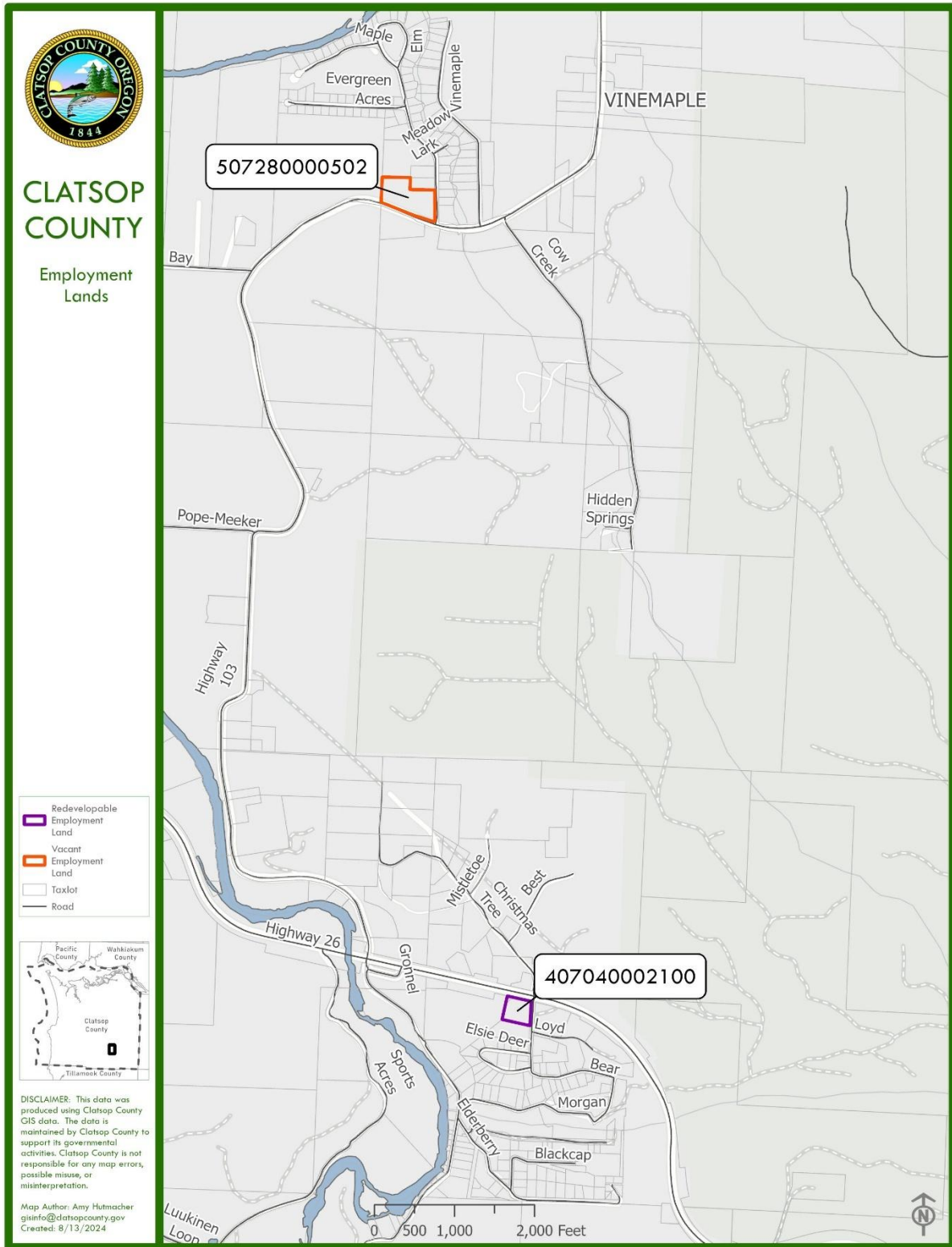
Appendix B: Vacant and Redevelopable Lands Analysis

Employment Lands Map B-16



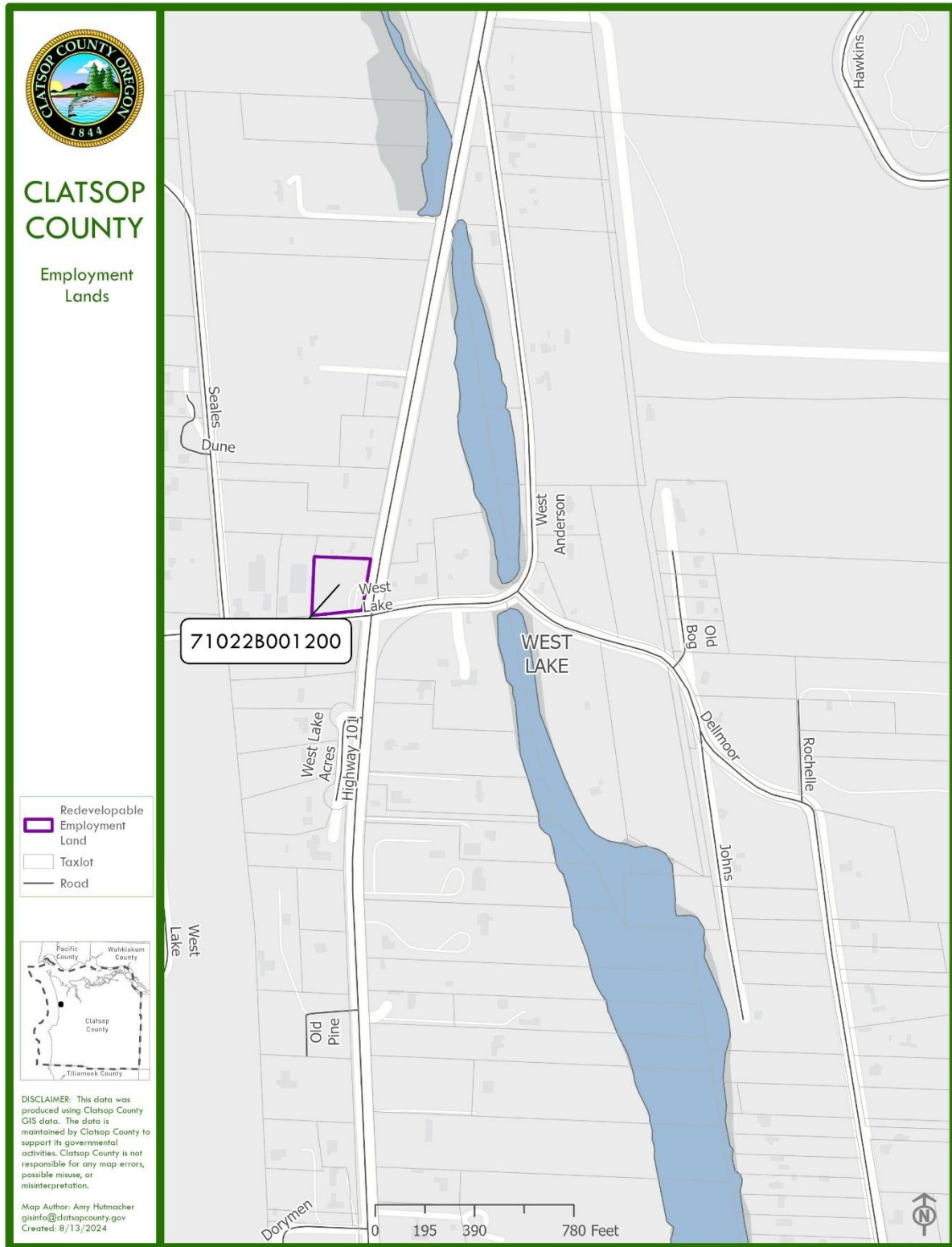
Appendix B: Vacant and Redevelopable Lands Analysis

Employment Lands Map B-17



Appendix B: Vacant and Redevelopable Lands Analysis

Employment Lands Map B-18



Appendix B: Vacant and Redevelopable Lands Analysis

FORECAST OF EMPLOYMENT AND LAND NEED

CLATSOP COUNTY EMPLOYMENT FORECAST

Goal 9 requires that jurisdictions plan for a 20-year supply of commercial and industrial capacity. Because employment capacity is the physical space necessary to accommodate new workers in the production of goods and services, employment need forecasts typically begin with a forecast of employment growth in the community. The previous analysis of economic trends and targeted industries set the context for these estimates. This analysis translates those trends into estimates of employment growth by broad industry. Forecasts are produced at the sector or subsector level (depending on available information), and subsequently aggregated into two-digit North American Industry Classification System (NAICS) sectors. Estimates in this analysis are intended for long-range land planning purposes and are not designed to predict or respond to business cycle fluctuation.

The projections in this analysis are built on an estimate of employment in 2024, the commencement year for the planning period. Employment growth will come as the result of net-expansion of existing businesses in the community, new business formation, or the relocation/recruitment of new firms. Forecast scenarios consider a range of factors influencing growth. Long-range forecasts typically rely on a macroeconomic context for growth. The forecast does not consider the impact of a significant exogenous shift in employment such as recruitment of an unforeseen major employer.

Overview of Employment Forecast Methodology

Our methodology starts with employment forecasts for major commercial and industrial sectors. Forecasted employment is allocated to building type, and a space demand is a function of the assumed square footage per employee ratio multiplied by projected change. The need for space is then converted into land and site needs based on assumed development densities using floor area ratios (FARs).

FIGURE 6.01: UPDATE TO 2020 BASELINE AND CONVERSION OF COVERED TO TOTAL EMPLOYMENT



Appendix B: Vacant and Redevelopable Lands Analysis

The first analytical step of the analysis is to update employment to the 2024 base year. Bureau of Economic Analysis data was used to determine Clatsop County’s total employment by industry through 2022, the latest year available. To update these estimates, this report observed industry specific growth rates for Clatsop County between 2021 and 2023.

The estimated 2024 total employment base for Clatsop County is 26,560 jobs.

FIGURE D-1: UPDATE TO 2024 BASELINE AND CONVERSION OF COVERED TO TOTAL EMPLOYMENT, CLATSOP COUNTY (2022 – 2024)

Major Industry Sector	Estimated Current Employment		
	2022 Employment	'22-'24 County Δ ¹	2024 Estimate
Agriculture, forestry, fishing, hunting	904	-0.9%	896
Construction	1,553	1.0%	1,569
Manufacturing	1,882	2.7%	1,933
Wholesale Trade	245	5.8%	259
Retail Trade	3,757	1.0%	3,796
T.W.U. ³	547	11.7%	611
Information	255	-5.7%	240
Finance & Insurance	647	2.4%	663
Real Estate	1,386	2.4%	1,420
Professional & Technical Services	963	1.0%	972
Administration Services	1,057	1.0%	1,067
Education	203	4.9%	213
Health Care/Social Assistance	2,673	4.9%	2,805
Leisure & Hospitality	5,549	3.9%	5,763
Other Services	1,216	6.6%	1,296
Government	3,094	-1.3%	3,055
TOTAL	25,931	2.4%	26,558

Source: Bureau of Economic Analysis, Johnson Economics

1) Growth rate calculated using CES data for Clatsop County

Scenario 1: Baseline “Safe Harbor” Forecast

The Goal 9 statute does not have a required method for employment forecasting. However, OAR 660-024-0040(9)(a) outlines several safe harbor methods, which are intended to provide jurisdictions a methodological approach that will not be challenged. The recommended approach for Clatsop County is 660-024-0040(9)(a)(A), which allows reliance on the most recent regional forecast published by the Oregon Employment Department (see Figure 4.08).² This method applies industry specific growth rates for the Northwest Oregon region (Benton, Clatsop, Columbia, Lincoln, and Tillamook counties) to Clatsop County’s 2024 base employment. This method results in an average annual growth rate of 1.0%, with a total

² The second safe harbor method described under OAR 660-024-0040(9)(B) allows using the most recently forecasted population growth rate for the City from the PSU Population Research Center. The employment growth rate may be assumed to match the population growth rate. This option was reviewed by the Technical Advisory Group but ultimately declined.

Appendix B: Vacant and Redevelopable Lands Analysis

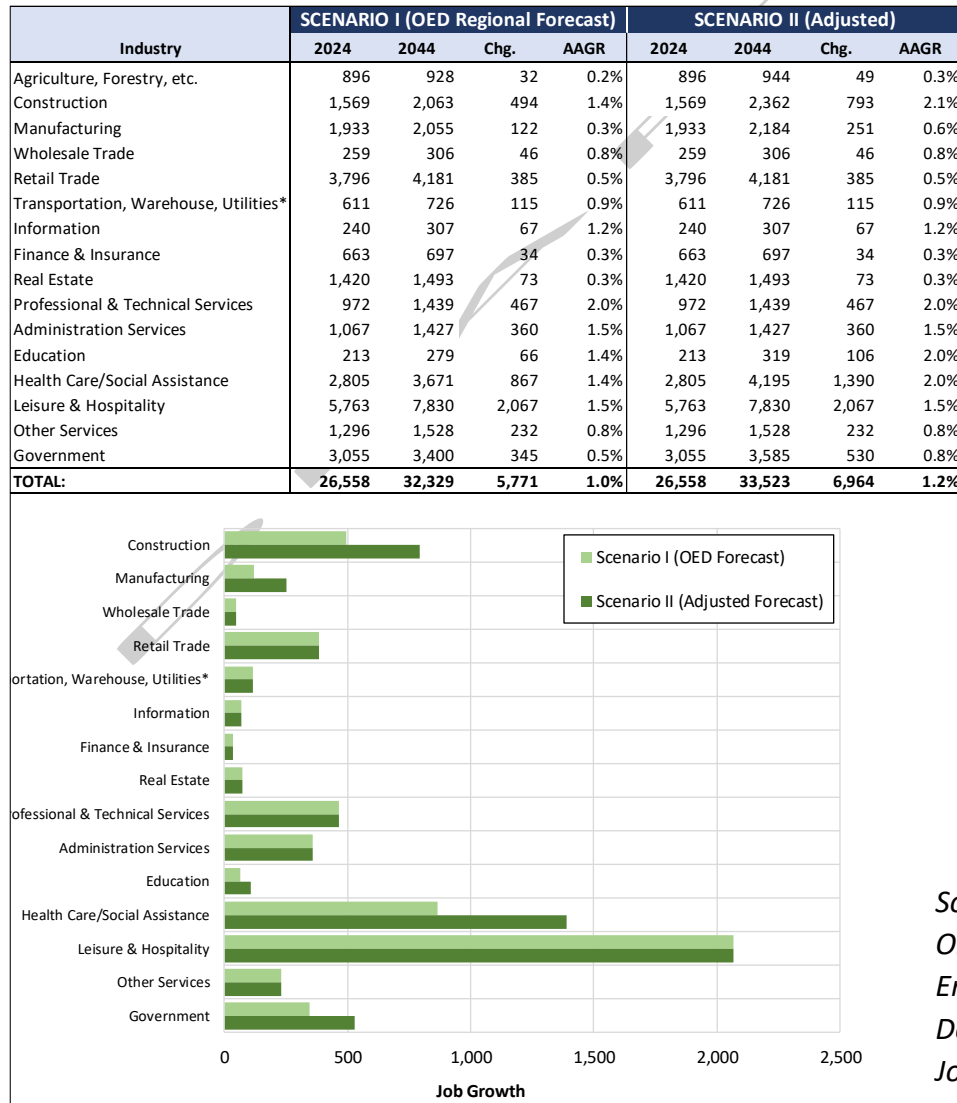
estimated growth of 5,771 jobs over the forecast period.

Scenario 2: Adjusted Employment Forecast

A second adjusted forecast scenario was influenced by the research and analysis conducted in the EOA. This scenario formulates an employment growth trajectory based on identified trends, a more optimistic growth outlook for targeted industries, and input from the project technical advisory group. Further, the alternative scenario recognizes that economic development efforts and public policy can influence realized growth in targeted sectors.

The adjusted scenario considers the influence of known or anticipated development over the near- and medium-term horizon, and local economic development goals. This scenario forecasts an average annual growth rate of 1.2% for the period, for a total addition of 6,964 new jobs. This adjusted growth rate is modestly increased from the baseline estimate, with emphasis on the target industry sectors.

FIGURE D-2: COMPARISON OF ALTERNATE FORECASTS, CLATSOP COUNTY (2024 - 2044)



Source:
Oregon
Employment
Department,
Johnson

Appendix B: Vacant and Redevelopable Lands Analysis

Summary of Employment Forecast Scenarios

The two forecast scenarios in this analysis range from 1.0% to 1.2% average annual growth. Job growth estimates range from 5,770 to 6,965 jobs over the 20-year period. Forecasts grounded in broad based economic variables cannot account for all the realities of local businesses and trends among evolving industries. For instance, a single large firm’s location and/or operational decision may substantively impact the rate of growth. Any long-term forecast is inherently uncertain and should be updated on a regular basis to reflect more current information.

The forecasts were further broken down into four five-year increments, assuming a consistent rate of growth over the period. It is expected that a twenty-year forecast will include multiple business cycles, and that growth will be variable.

FIGURE D-3: SUMMARY OF PROJECTION SCENARIOS, CLATSOP COUNTY

Industry	Overall Employment					Net Change by Period				Total 24-44
	2024	2029	2034	2039	2044	24-29	29-34	35-39	40-44	
BASELINE SCENARIO										
Agriculture, forestry, fishing, hunting	896	904	912	920	928	8	8	8	8	32
Construction	1,569	1,680	1,799	1,927	2,063	111	119	127	136	494
Manufacturing	1,933	1,963	1,993	2,024	2,055	30	30	31	31	122
Wholesale Trade	259	270	281	293	306	11	11	12	12	46
Retail Trade	3,796	3,889	3,984	4,081	4,181	93	95	97	100	385
T.W.U.	611	638	666	695	726	27	28	29	31	115
Information	240	256	272	289	307	15	16	17	18	67
Finance & Insurance	663	671	680	688	697	8	8	9	9	34
Real Estate	1,420	1,438	1,456	1,474	1,493	18	18	18	19	73
Professional & Technical Services	972	1,072	1,183	1,305	1,439	100	110	122	134	467
Administration Services	1,067	1,148	1,234	1,327	1,427	80	86	93	100	360
Education	213	228	244	261	279	15	16	17	18	66
Health Care/Social Assistance	2,805	3,000	3,209	3,432	3,671	195	209	223	239	867
Leisure & Hospitality	5,763	6,222	6,717	7,253	7,830	459	496	535	578	2,067
Other Services	1,296	1,350	1,407	1,466	1,528	54	57	59	62	232
Government	3,055	3,138	3,223	3,310	3,400	83	85	87	90	345
TOTAL:	26,558	27,866	29,259	30,745	32,329	1,308	1,393	1,485	1,584	5,771
SCENARIO 2 (Modified)										
Agriculture, forestry, fishing, hunting	896	908	920	932	944	12	12	12	12	49
Construction	1,569	1,738	1,925	2,132	2,362	169	187	207	230	793
Manufacturing	1,933	1,993	2,055	2,119	2,184	60	62	64	66	251
Wholesale Trade	259	270	281	293	306	11	11	12	12	46
Retail Trade	3,796	3,889	3,984	4,081	4,181	93	95	97	100	385
T.W.U.	611	638	666	695	726	27	28	29	31	115
Information	240	256	272	289	307	15	16	17	18	67
Finance & Insurance	663	671	680	688	697	8	8	9	9	34
Real Estate	1,420	1,438	1,456	1,474	1,493	18	18	18	19	73
Professional & Technical Services	972	1,072	1,183	1,305	1,439	100	110	122	134	467
Administration Services	1,067	1,148	1,234	1,327	1,427	80	86	93	100	360
Education	213	236	260	288	319	23	25	28	30	106
Health Care/Social Assistance	2,805	3,102	3,430	3,793	4,195	297	328	363	402	1,390
Leisure & Hospitality	5,763	6,222	6,717	7,253	7,830	459	496	535	578	2,067
Other Services	1,296	1,350	1,407	1,466	1,528	54	57	59	62	232
Government	3,055	3,180	3,310	3,445	3,585	125	130	135	141	530
TOTAL:	26,558	28,109	29,780	31,580	33,523	1,551	1,671	1,801	1,942	6,964

Source: Oregon Employment Department, Johnson Economics

EMPLOYMENT LAND FORECAST

The next analytical step in our analysis is to convert projections of employment into forecasts of

Appendix B: Vacant and Redevelopable Lands Analysis

land demand over the planning period. The methodology begins by allocating employment by sector into a distribution of building typologies those economic activities typically use. As an example, insurance agents typically locate in traditional office space, often along commercial corridors. However, a percentage of these firms are also located in commercial retail space adjacent to retail anchors. Cross tabulating this distribution provides an estimate of employment in each real estate type. The next step converts employment into space using estimates of the typical square footage exhibited within each typology. Adjusting for market average vacancy the report arrived at an estimate of total space demand for each building type.

Finally, this report considers the physical characteristics of individual building types and the amount of land they typically require for development. The site utilization metric commonly used is referred to as a “floor area ratio” or FAR. For example, assume a 25,000-square foot general industrial building requires roughly a site of roughly 100k square feet to accommodate its structure, setbacks, parking, and necessary yard/storage space. This building would have an FAR of roughly 0.25. Demand for space is then converted to net acres using a standard floor area ratio FAR for each development form.

Land Demand Analysis – Adjusted Forecast

In this analytical step, employment growth is allocated to the standard building typologies. The building typology matrix represents the share of sectoral employment that is located across various building types. (Note that only a fraction of employment in the agricultural sector is assumed to need urban real estate, as many of these companies operate in unincorporated areas in the region around the city. Food processing operations are captured under “manufacturing.”)

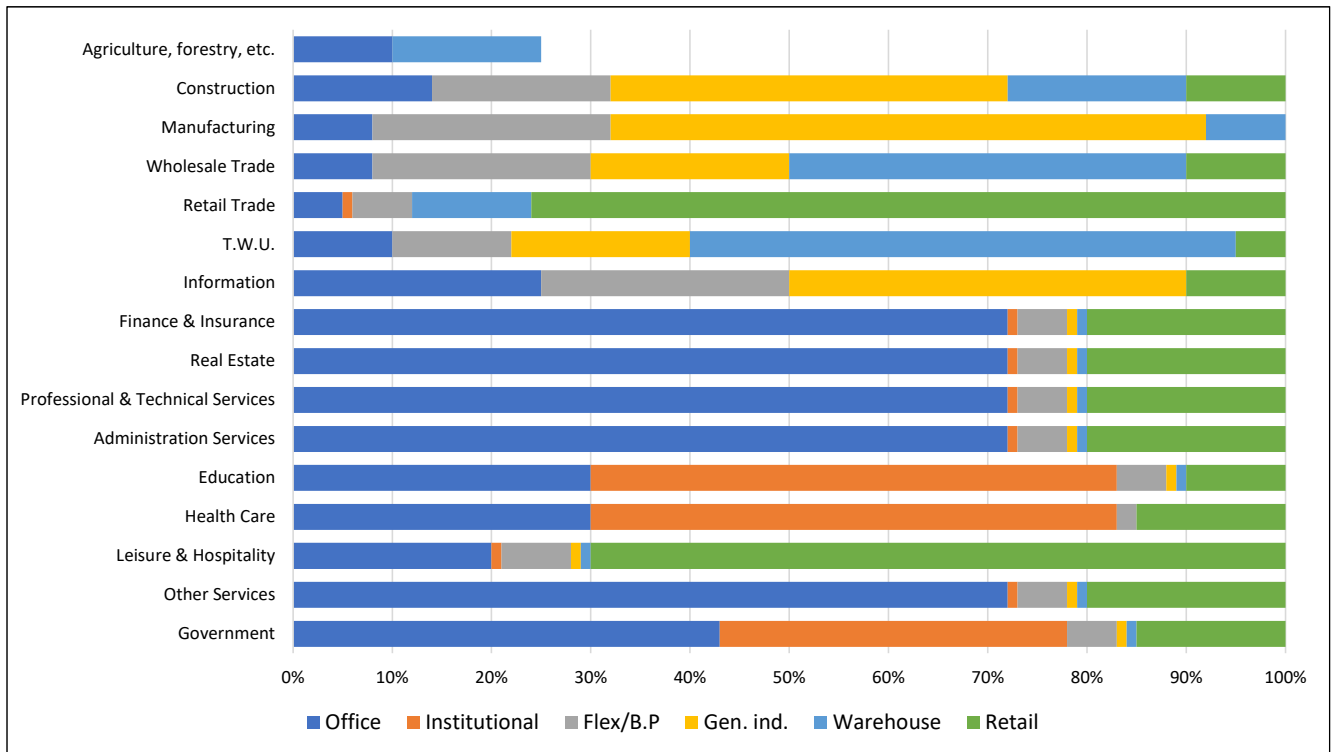
FIGURE D-4: DISTRIBUTION OF EMPLOYMENT BY SPACE TYPE, CLATSOP COUNTY (BASELINE FORECAST)

Industry Sector	20-year Job Forecast		BUILDING TYPE MATRIX					
	Number	AAGR	Office	Institutional	Flex/B.P	Gen. ind.	Warehouse	Retail
Agriculture, forestry, fishing, hunting	32	0.2%	10%	0%	0%	0%	15%	0%
Construction	494	1.4%	14%	0%	18%	40%	18%	10%
Manufacturing	122	0.3%	8%	0%	24%	60%	8%	0%
Wholesale Trade	46	0.8%	8%	0%	22%	20%	40%	10%
Retail Trade	385	0.5%	5%	1%	6%	0%	12%	76%
T.W.U.	115	0.9%	10%	0%	12%	18%	55%	5%
Information	67	1.2%	25%	0%	25%	40%	0%	10%
Finance & Insurance	34	0.3%	72%	1%	5%	1%	1%	20%
Real Estate	73	0.3%	72%	1%	5%	1%	1%	20%
Professional & Technical Services	467	2.0%	72%	1%	5%	1%	1%	20%
Administration Services	360	1.5%	72%	1%	5%	1%	1%	20%
Education	66	1.4%	30%	53%	5%	1%	1%	10%
Health Care	867	1.4%	30%	53%	2%	0%	0%	15%
Leisure & Hospitality	2,067	1.5%	20%	1%	7%	1%	1%	70%
Other Services	232	0.8%	72%	1%	5%	1%	1%	20%
Government	345	0.5%	43%	35%	5%	1%	1%	15%
TOTAL	5,771	1.0%	31%	11%	7%	6%	5%	39%

Source: Johnson Economics

Appendix B: Vacant and Redevelopable Lands Analysis

FIGURE D-5: ASSUMED DISTRIBUTION OF SPACE BY TYPE AND INDUSTRY SECTOR, CLATSOP COUNTY



Source: Johnson Economics

FIGURE D-6: NET GROWTH IN EMPLOYMENT BY BUILDING TYPE, CLATSOP COUNTY 2024-2044

Industry Sector	NET CHANGE IN EMPLOYMENT BY BUILDING TYPE - 2024-2044						Total
	Office	Institutional	Flex/B.P.	Gen. Ind.	Warehouse	Retail	
Agriculture, forestry, fishing, hunting	3	0	0	0	5	0	8
Construction	69	0	89	197	89	49	494
Manufacturing	10	0	29	73	10	0	122
Wholesale Trade	4	0	10	9	19	5	46
Retail Trade	19	4	23	0	46	293	385
T.W.U.	11	0	14	21	63	6	115
Information	17	0	17	27	0	7	67
Finance & Insurance	24	0	2	0	0	7	34
Real Estate	52	1	4	1	1	15	73
Professional & Technical Services	336	5	23	5	5	93	467
Administration Services	259	4	18	4	4	72	360
Education	20	35	3	1	1	7	66
Health Care	260	459	17	0	0	130	867
Leisure & Hospitality	413	21	145	21	21	1,447	2,067
Other Services	167	2	12	2	2	46	232
Government	148	121	17	3	3	52	345
TOTAL	1,814	651	423	364	268	2,228	5,746

Source: Johnson Economics

Appendix B: Vacant and Redevelopable Lands Analysis

Under the employment forecast scenario, employment housed in retail space accounts for the greatest share of growth, followed by employment housed in warehouse and office space. The combined employment forecast in commercially zoned space (~4,700 jobs) is greater than that forecast for industrially zoned space (~1,050 jobs). Note that the 5,746 total jobs shown here is less than the total employment in the adjusted forecast (5,771 jobs) because not all agricultural jobs require commercial real estate space.

Employment growth estimates by building type are then converted to demand for physical space. This conversion assumes the typical space needed per employee on average. This step also assumes a market average vacancy rate, acknowledging that equilibrium in real estate markets is not 0% vacancy. The report assumes a 10% vacancy rate for office, retail, and flex uses, as these forms have high rates of speculative multi-tenant usage. A 5% rate is used for general industrial and warehouse—these uses have higher rates of owner occupancy that lead to lower overall vacancy. Institutional uses are assumed to have no vacancy, as they are typically purpose-built for healthcare, nonprofit, government or related users.

The demand for space is converted into an associated demand for acreage using an assumed Floor Area Ratio (FAR). The combined space and FAR assumptions further provide estimates indicated of job densities, determined on a per net-developable acre basis.

FIGURE D-7: NET ACRES REQUIRED BY BUILDING TYPOLOGY, CLATSOP COUNTY (BASELINE FORECAST) – 20-YEAR

	DEMAND BY GENERAL USE TYPOLOGY, 2024-2044						Total
	Office	Institutional	Flex/B.P	Gen. Ind.	Warehouse	Retail	
Employment Growth	1,814	651	423	364	268	2,228	5,746
Avg. SF Per Employee	350	350	990	600	1,800	500	539
Demand for Space (SF)	634,700	227,800	418,500	218,200	482,000	1,113,800	3,095,000
Floor Area Ratio (FAR)	0.30	0.30	0.25	0.25	0.25	0.25	0.26
Market Vacancy	10.0%	0.0%	10.0%	5.0%	5.0%	10.0%	8.1%
Implied Density (Jobs/Acre)	33.6	37.3	9.9	17.2	5.7	19.6	19.6
Net Acres Required	54.0	17.4	42.7	21.1	46.6	113.6	293.0
Share for infrastructure (Net-to-Gross)	20%	20%	15%	15%	15%	20%	19%
Gross Acres Required	67.5	21.8	50.2	24.8	54.8	142.1	361.2

Source: Johnson Economics

Commercial office and retail densities are 33 and 20 jobs per acre, respectively. Industrial uses range from 17 for general industrial to less than 6 jobs per acre for warehouse/distribution. The overall weighted employment density is 20 jobs per acre, with the projected 5,770-job expansion in the local employment base through 2044 requiring an estimated 293 net acres, and 361 gross acres, of employment land. An estimated 36% of this forecasted need is industrial land, and 64% commercial land.

Appendix B: Vacant and Redevelopable Lands Analysis

In addition to assuring adequate capacity for employment-driven land needs over a twenty-year horizon, local jurisdictions are also required to demonstrate that they have an adequate capacity of readily available sites to meet their more immediate needs, which are defined as employment land needs over the next five years (Figure 6.09).

FIGURE D-8: NET ACRES REQUIRED BY BUILDING TYPOLOGY, CLATSOP COUNTY (BASELINE FORECAST) – 5-YEAR

	DEMAND BY GENERAL USE TYPOLOGY, 2024-2044						Total
	Office	Institutional	Flex/B.P	Gen. Ind.	Warehouse	Retail	
Employment Growth	411	148	96	82	62	502	1,302
Avg. SF Per Employee	350	350	990	600	1,800	500	540
Demand for Space (SF)	143,700	52,000	95,100	49,300	111,600	251,200	702,900
Floor Area Ratio (FAR)	0.30	0.30	0.25	0.25	0.25	0.25	0.26
Market Vacancy	10.0%	0.0%	10.0%	5.0%	5.0%	10.0%	8.1%
Implied Density (Jobs/Acre)	33.6	37.3	9.9	17.3	5.7	19.6	19.6
Net Acres Required	12.2	4.0	9.7	4.8	10.8	25.6	66.5
Share for infrastructure (Net-to-Gross)	20%	20%	15%	15%	15%	20%	19%
Gross Acres Required	15.3	5.0	11.4	5.6	12.7	32.0	82.0

Source: Johnson Economics

There is a significant distinction between bulk land capacity and readily available site supply. To be considered readily available, land must currently have appropriate entitlements and be served by adequate infrastructure capacity to accommodate short-term development. Some of the land inventory will be in sites and locations that may be harder to serve quickly and efficiently.

Employment Land Need

The EOA analysis finds that the forecasted 20-year job growth by industry will translate to a need for 293 total net acres (361 gross acres) of land zoned for employment uses. The distribution of land demand between commercial uses (Office, Institutional, Retail) and industrial uses (Industrial, Warehouse, Business Park) leans towards commercial (64% vs. 36%).

A range of site sizes will be needed, ranging from small to large to accommodate the projected business expansion. Different commercial and industrial users have different site requirements driven by the specific nature of their business operations, firm size, location and infrastructure requirements, and other factors.

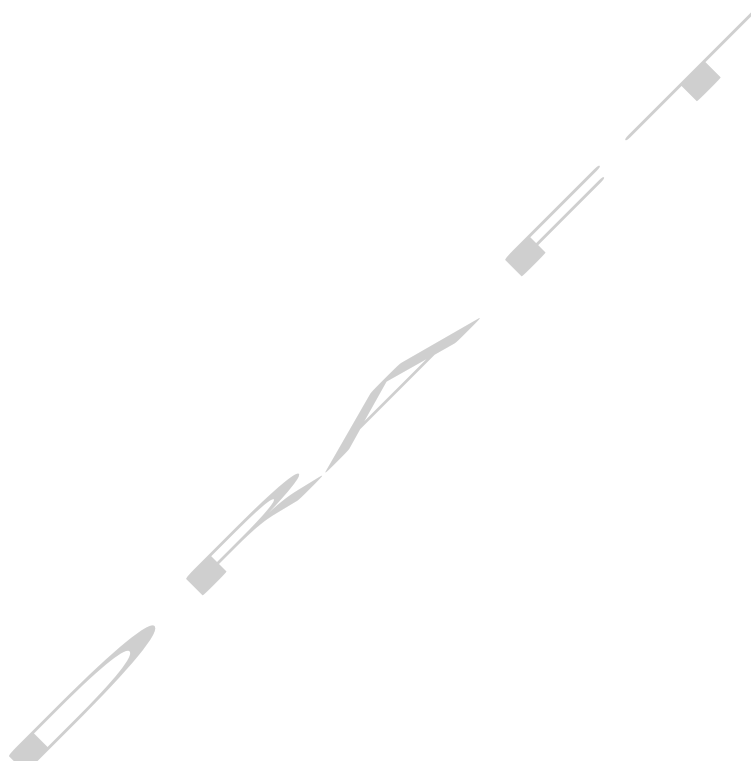
Adequacy of Employment Land Supply

The Buildable Land Inventory (BLI) of employment lands completed in conjunction with the EOA focused on unincorporated areas and found a total of 60 net buildable acres in Commercial and Industrial zones. However, most employment growth is anticipated to take place within the UGB of the incorporated cities. While inventories of remaining lands in these cities are somewhat dated, the two most recent inventories in the county's two largest cities found

Appendix B: Vacant and Redevelopable Lands Analysis

ample buildable land remaining to accommodate the forecasted growth:

- Warrenton’s inventory (2021) found a surplus of 126 commercial acres and 517 industrial acres.
- Astoria’s most recent inventory (2017) found a surplus of 125 commercial acres and 343 industrial acres.
- This inventory, combined with remaining development capacity in the county’s smaller cities should be sufficient to accommodate the forecasted growth in coming decades even if economic development is quite robust.





CLATSOP COUNTY PROJECT STATUS REPORT

May 2025

PROJECT STATUS REPORT – May 2025

PERMIT #	PROJECT NAME	LOCATION	DESCRIPTION	PC MEETING DATE	PC DECISION	BOC MEETING DATES	BOC DECISION	STATUS	EXPIRATION DATE*
	FEMA BiOp	All Special Flood Hazard Areas	Pre-Implementation Compliance Measures prior to full implementation of the Environmental Impact Statement	June 10, 2025		BOC 1 st Reading June 11, 2025 BOC 2 nd Reading June 25, 2025		Board selected Model Ordinance PICM 11/13/24 Notice of PICM selection emailed to FEMA 11/15/24 Injunction hearing was moved to District of Oregon Court	
23-000556 Ordinance 24-14	Housing Amendments	N/A	LAWDUC amendments to facilitate housing construction	10-08-24	APPROVED 7-0	10-23-24 11-13-24	APPROVED 4-0	LUBA appeal filed 12-9-24 In effect at this time LUBA Hearing conducted 4/29/2025 Link to watch the hearing: https://www.youtube.com/@landuseboardofappeals8802/streams	N/A

PROJECT STATUS REPORT – May 2025

PERMIT #	PROJECT NAME	LOCATION	DESCRIPTION	PC MEETING DATE	PC DECISION	BOC MEETING DATES	BOC DECISION	STATUS	EXPIRATION DATE*
24-000467 Ordinance 25-02	Clear and Objective Standards for Housing	N/A	Develop clear and objective standards for housing by July 1, 2025	March 8, 2025	Recommended Approval 03/12/2025 6-0	BOC 1 st Reading March 26, 2025 continued to April 23 rd April 23, 2025 BOC Conducted 1 st reading, and continued to May 14, 2025 BOC 2 nd Reading May 14, 2025			N/A
Ordinance 25-08 Ordinance 25-09	Update of Goals 16, 17 Goal 18	N/A	Update to comprehensive plan, revising Goal 16: Estuarine Resources; Goal 17: Coastal Shorelands; and Goal 18: Beaches and Dunes	PC Public Hearing June 10, 2025		BOC 1 st Reading June 25, 2025 BOC 2 nd Reading July 9, 2025		PC Project Update April 8, 2025 Public open house	N/A

PROJECT STATUS REPORT – May 2025

PERMIT #	PROJECT NAME	LOCATION	DESCRIPTION	PC MEETING DATE	PC DECISION	BOC MEETING DATES	BOC DECISION	STATUS	EXPIRATION DATE*
Ordinance 25-07	Economic Opportunities Analysis	N/A	20-year economic development plan	Public Hearing May 13, 2025		BOC 1 st Reading June 11, 2025 BOC 2 nd Reading June 25, 2025		DLCD Notification by 4/4/2025	N/A
25-000049 Ordinance 25-03	USACE Goal 16 Exception – Conservation Areas	Various	Exception to Goal 16: Estuarine Resources, to allow disposal of dredged materials in several areas designated Conservation	Public Hearing July 8, 2025		BOC 1 st Reading July 23, 2025 BOC 2 nd Reading August 13, 2025		Received request for extension of review period	N/A
25-000049-01 Ordinance 25-04	USACE Goal 16 Exception – Natural Areas	Various	Exception to Goal 16: Estuarine Resources, to allow disposal of dredged materials in several areas designated Natural	Public Hearing July 8, 2025		BOC 1 st Reading July 23, 2025 BOC 2 nd Reading August 13, 2025		Received request for extension of review period	N/A
25-000049-02 Ordinance 25-05	USACE Text Amendments	N/A	LAWDUC and Comprehensive Plan text amendments related to the Exceptions to Goal 16: Estuarine Resources	Public Hearing July 8, 2025		BOC 1 st Reading July 23, 2025 BOC 2 nd Reading August 13,		Received request for extension of review period	N/A

PROJECT STATUS REPORT – May 2025

PERMIT #	PROJECT NAME	LOCATION	DESCRIPTION	PC MEETING DATE	PC DECISION	BOC MEETING DATES	BOC DECISION	STATUS	EXPIRATION DATE*
						2025			
25-000049-03 Ordinance 25-06	USACE Map Amendments	Various	Comprehensive Plan map amendments revising the Dredged Material Disposal Overlay zone	Public Hearing July 8, 2025		BOC 1 st Reading July 23, 2025 BOC 2 nd Reading August 13, 2025		Received request for extension of review period	N/A
20170352	Arch Cape Deli	T4N, R10W, Section 30BB, Tax Lots 00601 and 00605 79330 Hwy 101	Conditional use permit to construct and operate a restaurant/grocery store/flex space with a manager's living quarters	11-14-17	APPROVED WITH CONDITIONS 7-0	N/A	N/A	Demolition and grading permits approved; property line adjustment approved; electrical, mechanical and fire suppression permits issued	Project is vested for land use; no expiration date Building permit expired 7-5-22 No active building permits

*Expiration date for projects that are not completed or substantially completed

 Indicates change to project status



Clatsop County – Land Use Planning

800 Exchange Street, Suite 100
Astoria, OR 97103
(503) 325-8611 | (503) 338-3606 (Fax) | comdev@clatsopcounty.gov

TO: Planning Commission Members
FROM: Gail Henrikson, AICP, CFM – Community Development Director
DATE: May 13, 2025
RE: **MAY 2025 DIRECTOR'S REPORT**

LAWDUC HOUSING AMENDMENTS

LUBA heard oral arguments on April 29, 2025. A decision is expected by May 27. To date, Clatsop County has expended almost \$20,000 in legal fees on this appeal.

COMPREHENSIVE PLAN UPDATE

- **Economic Opportunities Analysis (EOA):** The first public hearing for the EOA will be held before the Planning Commission on May 13. Two public hearings before the Board of Commissioners are scheduled for May 28 and June 11, 2025.
- **Goals 16-18 Updates**
Work sessions were held with the Board of Commissioners on April 16 and 23. Comments from the Board, Planning Commission and Technical Advisory Committee are being incorporated into the public hearing draft. Public hearings are tentatively scheduled for July 2025.

U.S. ARMY CORPS OF ENGINEERS PROJECTS

The U.S. Army Corps of Engineers (USACE) has submitted four applications related to the disposal of dredged materials in the Columbia River Estuary. The applications include two exceptions to Goal 16: Estuarine Resources, text amendments, and map amendments. The applications have been deemed complete and the public hearings were scheduled for a public hearing before the Planning Commission on April 8. The applicant, however, requested an additional 60-day delay and the public hearings are now scheduled for the July 8 Planning Commission meeting.