



**CITY OF MOLALLA
CITY COUNCIL WORK SESSION
AGENDA**

Council Chambers | Molalla Civic Center - 315 Kennel Avenue - Molalla
Wednesday | July 24, 2024 | 6:00 PM

NOTICE: City Council will hold this meeting in-person and through video Live-Streaming on the City's Facebook Page and YouTube Channel. Work Sessions are open to the public, however, closed to Public Comment.

1. CALL TO ORDER AND ROLL CALL

2. DISCUSSION ITEMS

A. Economic Opportunities Analysis

- EOA – Presentation Pg. 2
- EOA – Report Pg. 13
- Employment Buildable Lands Inventory Pg. 50

3. ADJOURN



Molalla Economic Opportunities Analysis

City Council Meeting
July 24, 2024, 6:00 pm

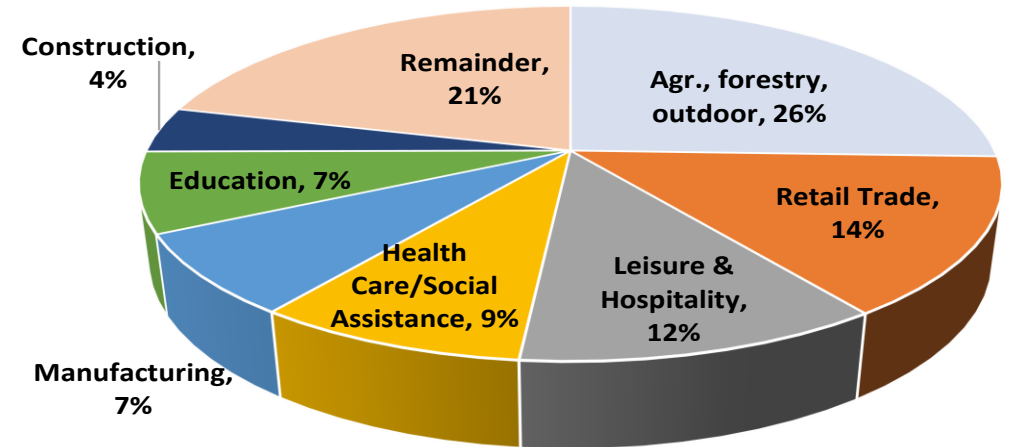
Agenda

- 1) Project Update
- 2) Draft EOA Report
- 3) Draft Land Inventory
- 4) Discussion of Findings
- 5) Next Steps



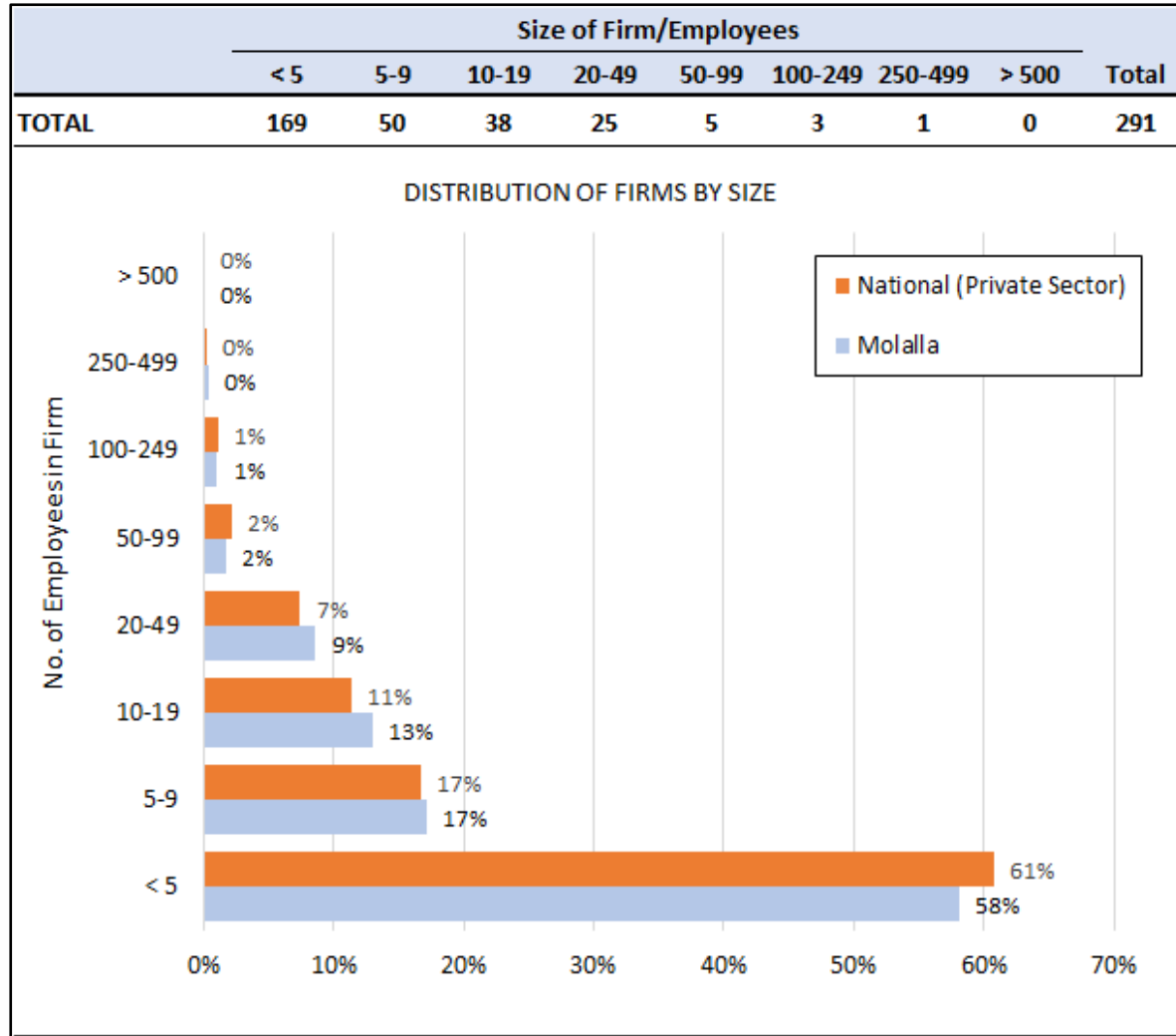
Employment Profile

Major Industry Sector	Estimated Employment 2024	Average Annual Wage	Share of Employment
Agr., forestry, outdoor	968	\$30,000	26%
Construction	157	\$53,000	4%
Manufacturing	280	\$58,000	7%
Wholesale Trade	159	\$104,000	4%
Retail Trade	547	\$32,000	14%
Transport., Warehousing, Utilities	129	\$48,000	3%
Information	38	\$138,000	1%
Finance & Insurance	22	\$91,000	1%
Real Estate	19	\$41,000	1%
Professional & Technical Services	56	\$45,000	1%
Administration Services	71	\$59,000	2%
Education	277	\$60,000	7%
Health Care/Social Assistance	327	\$37,000	9%
Leisure & Hospitality	441	\$20,000	12%
Other Services	205	\$40,000	5%
Government	93	\$79,000	2%
TOTAL	3,791	\$45,000	0% 10% 20% 30%



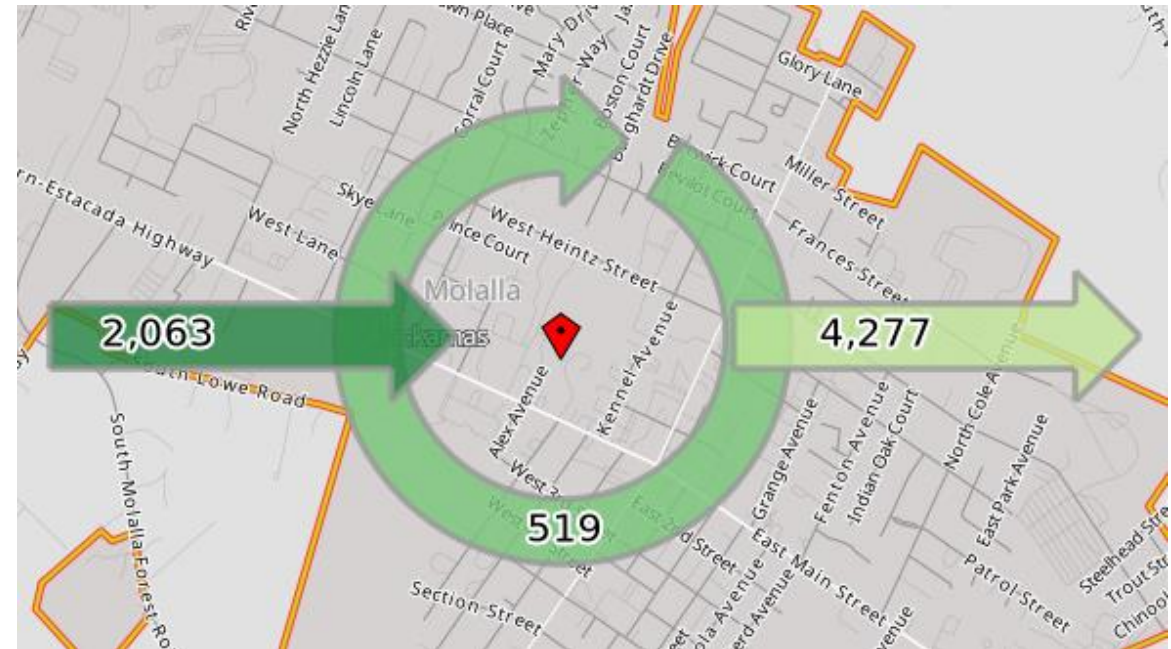
- Covered Employment: 3,100 jobs
- Total Employment: 3,800

Employment Profile



Commuting

- To: Portland, OR City, Canby, Salem
- From: Salem, Portland, Oregon City
- Jobs/Housing balance of 1:1



Employment Forecast Methodology

Employment Forecasts

- Start with Current Employment Profile
- Safe Harbor Approaches:
 - OED Submarket Forecast (1.0% AAGR)
 - Population Growth Forecast (1.9% AAGR)
- Adjusted Growth Forecast (TBD)
 - Reflects target industries and goals



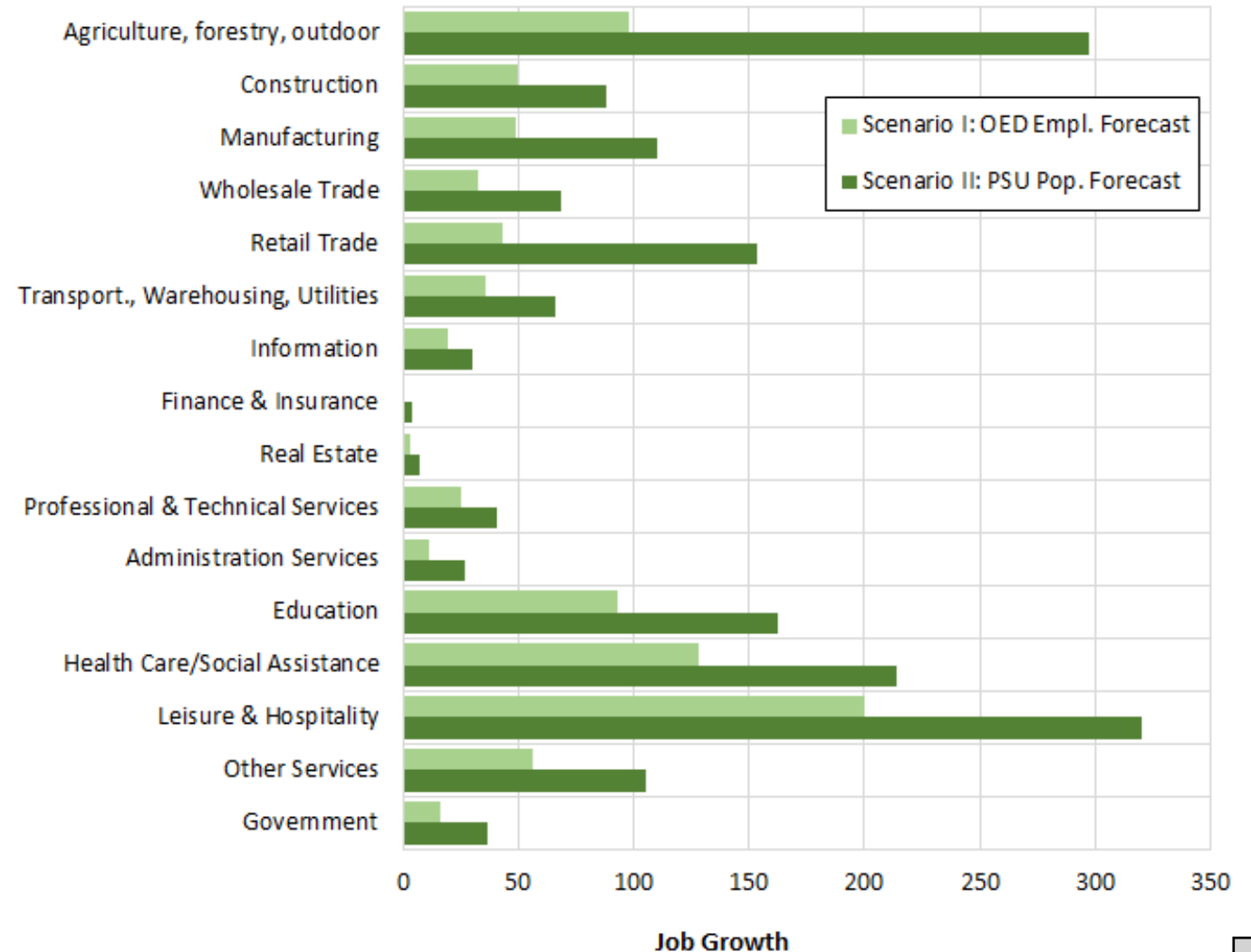
DRAFT Employment Forecasts

OED Employment Forecast

- 861 new jobs
- 1.0% annually

PSU Population Forecast

- 1,730 new jobs
- 1.9% annually
- Rate since 2010

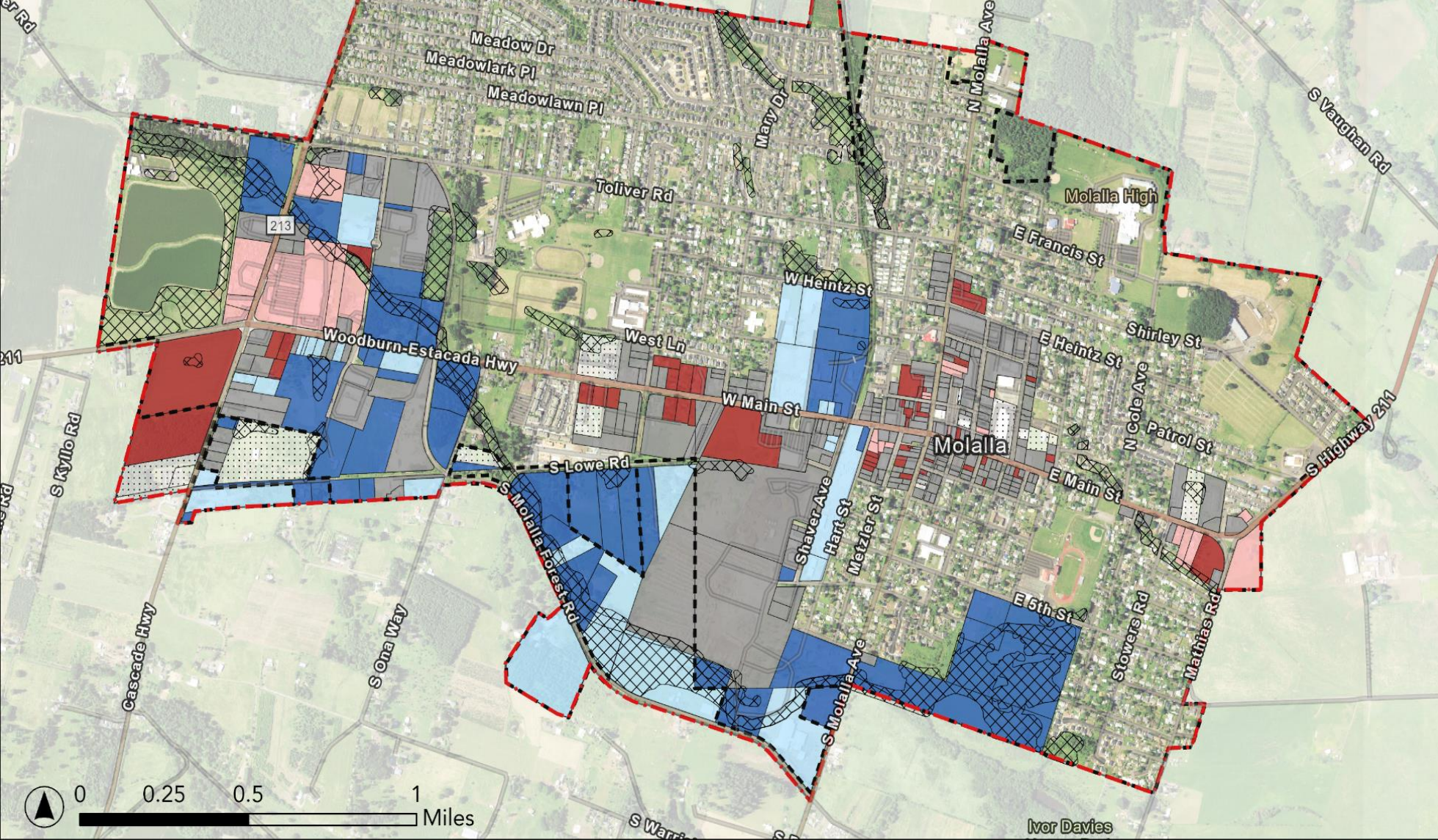




JOHNSON
ECONOMICS



Buildable Employment Land Inventory



City of Molalla
Economic Opportunities Analysis
Employment Buildable Lands Inventory

Legend

Commercial

Vacant

Partially Vacant

Developed

Committed

Industrial

Vacant

Partially Vacant

Developed

Committed

Constraints

City Boundary

UGB Boundary

Target Industries

Industry Cluster Analysis (2020)

- Manufacturing
- Forestry/Agriculture
- Education and Health Services
- Retail and Wholesale Trade
- Tourism/Outdoors
- Construction
- Strategies and Recommendations



Target Industries

CITY OF MOLALLA

Industry Clusters Analysis (2020)

Manufacturing
Agriculture/Forestry/Outdoors
Education
Health Care
Retail and Wholesale Trade
Tourism-Related (Dining, Lodging, Recreation)
Construction

CITY OF MOLALLA

Current Largest Employers

Agriculture/Forestry/Outdoors
Retail Trade
Tourism
Health Care
Manufacturing
Education
Construction

STRONG LOCATION QUOTIENT

Agriculture/Forestry/Outdoors
Education
Wood Manufacturing
Retail Trade
Accommodation and Food Services
Transportation

STRONG SHIFT SHARE INDICATOR

Agriculture/Forestry/Outdoors
Construction
Retail and Wholesale Trade
Accommodation and Food Service





Discussion:

- What are your top economic goals for the community?
- What industries have potential (real or aspirational)?
- What types of jobs are needed?
- What does the local workforce need?



Molalla Economic Opportunities Analysis

City Council Meeting
July 24, 2024, 6:00 pm



**CITY OF MOLALLA, OREGON
ECONOMIC OPPORTUNITIES ANALYSIS**

Prepared For:
City of Molalla, Oregon

June 2024



Acknowledgments

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DRAFT

I. INTRODUCTION

This report presents an Economic Opportunities Analysis (EOA) for the City of Molalla, Oregon.

Cities are required to reconcile estimates of future employment land demand with existing inventories of vacant and redevelopable employment land within their Urban Growth Boundary (UGB). The principal purpose of the analysis is to provide an adequate land supply for economic development and employment growth. This is intended to be conducted through a linkage of planning for an adequate land supply to infrastructure planning, community involvement and coordination among local governments and the state.

To this end, this report is organized into seven primary sections:

- **Economic Trends:** Provides an overview of national, state, and local economic trends affecting Clackamas County and the City of Molalla, including population projections, employment growth and a demographic profile.
- **Economic Development Potential:** A discussion of the comparative advantages of the local community and work force.
- **Target Industries:** Analysis of key industry typologies the City should consider targeting as economic opportunities over the planning period.
- **Employment Land Needs:** Examines projected demand for industrial and commercial land based on anticipated employment growth rates by sector.
- **Capacity:** Summarizes the City's inventory of vacant and redevelopable industrial and commercial land (employment land) within City of Molalla's UGB.
- **Reconciliation:** Compares short- and long-term demand for employment land to the existing land inventory to determine the adequacy and appropriateness of capacity over a five and twenty-year horizon.
- **Conclusions and Recommendations:** Summary of findings and policy implications.

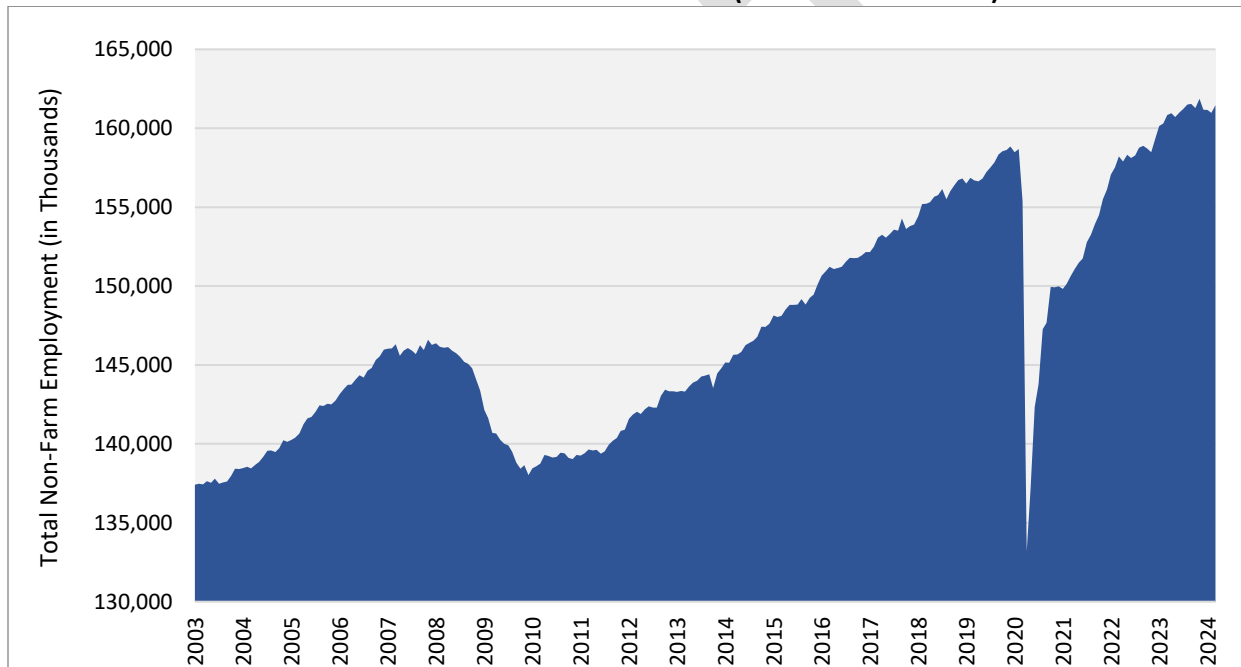
II. ECONOMIC TRENDS

This section summarizes employment and workforce trends at the national, state, and local level that will influence economic conditions in the City of Molalla over the 20-year planning period. This section is intended to provide the economic context for growth projections and establish a socioeconomic profile of the community.

A. NATIONAL TRENDS

Employment: In the first months of the pandemic, the nation lost nearly 22 million jobs, or 14% of total employment. However, the economy recovered quickly, displaying exponential growth as early as February 2021. As of late 2022, national employment had largely returned to pre-pandemic levels, eventually going on to reach a new peak in 2023 with roughly 162 million non-farm jobs in the economy (Figure 2.1).

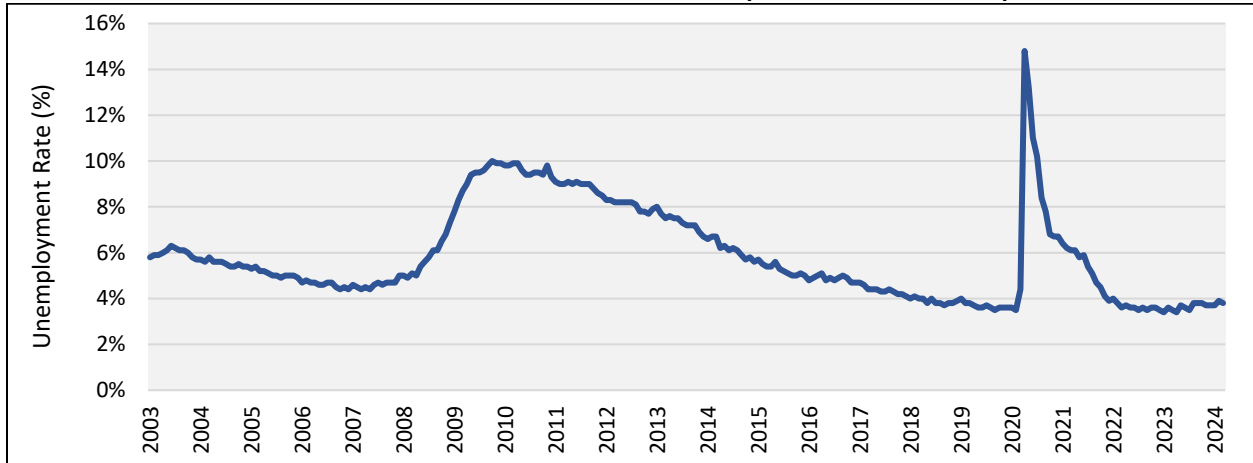
FIGURE 2.1: NATIONAL EMPLOYMENT LEVELS (JAN 2003 – MAR 2023)



Source: U.S Federal Reserve Bank of St. Louis

Unemployment Rate: The national unemployment rate spiked to nearly 15% in 2020 as many businesses paused operations or closed permanently in the first months of the pandemic. However, the unemployment rate began to decline almost immediately, and by mid-2022 had fallen back to a low 3.5%. There has been a slight uptick in the unemployment rate following the summer 2023, but it has remained low by historical standards, hovering around 3.9% as of March 2024 (Figure 2.2).

FIGURE 2.2: NATIONAL UNEMPLOYMENT RATE (JAN 2003 – MAR 2024)

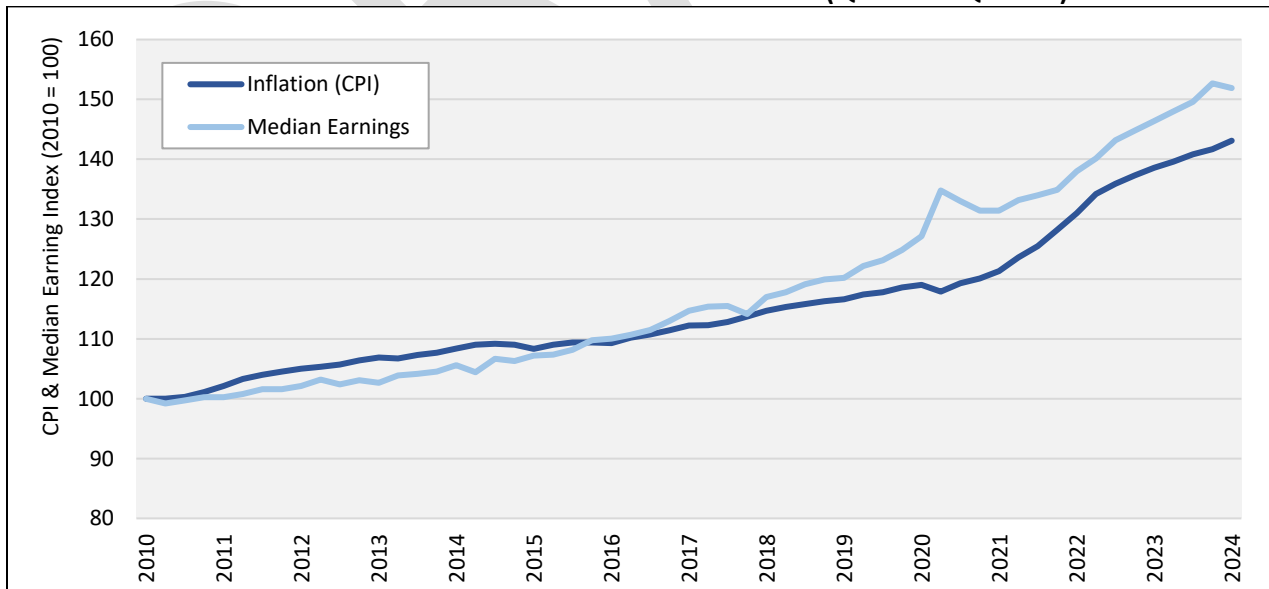


Source: U.S Federal Reserve Bank of St. Louis

Inflation: The counter story to this strong positive rebound in employment has been a rising rate of inflation coming out of the pandemic. Various stimulus measures, combined with supply shortages, led to rising prices for many consumer products, energy, and food. The rate of inflation accelerated in 2021 and began moderating towards the end of 2022, though the rate remains elevated (Figure 2.3). The Federal Reserve has maintained higher interest rates to curb price increases, however recent inflation has been at least partially driven by global macroeconomic forces beyond the Fed’s control.

Wages: On a positive note, average household earning levels have also enjoyed growth coming out of the recession and have largely kept pace with, or exceeded, inflation in recent years. Earnings also spiked in 2020 when government stimulus payments were added to earned wages. However, this growth has started to decelerate as of Q1 2024, decreasing from the quarter before (Figure 2.3).

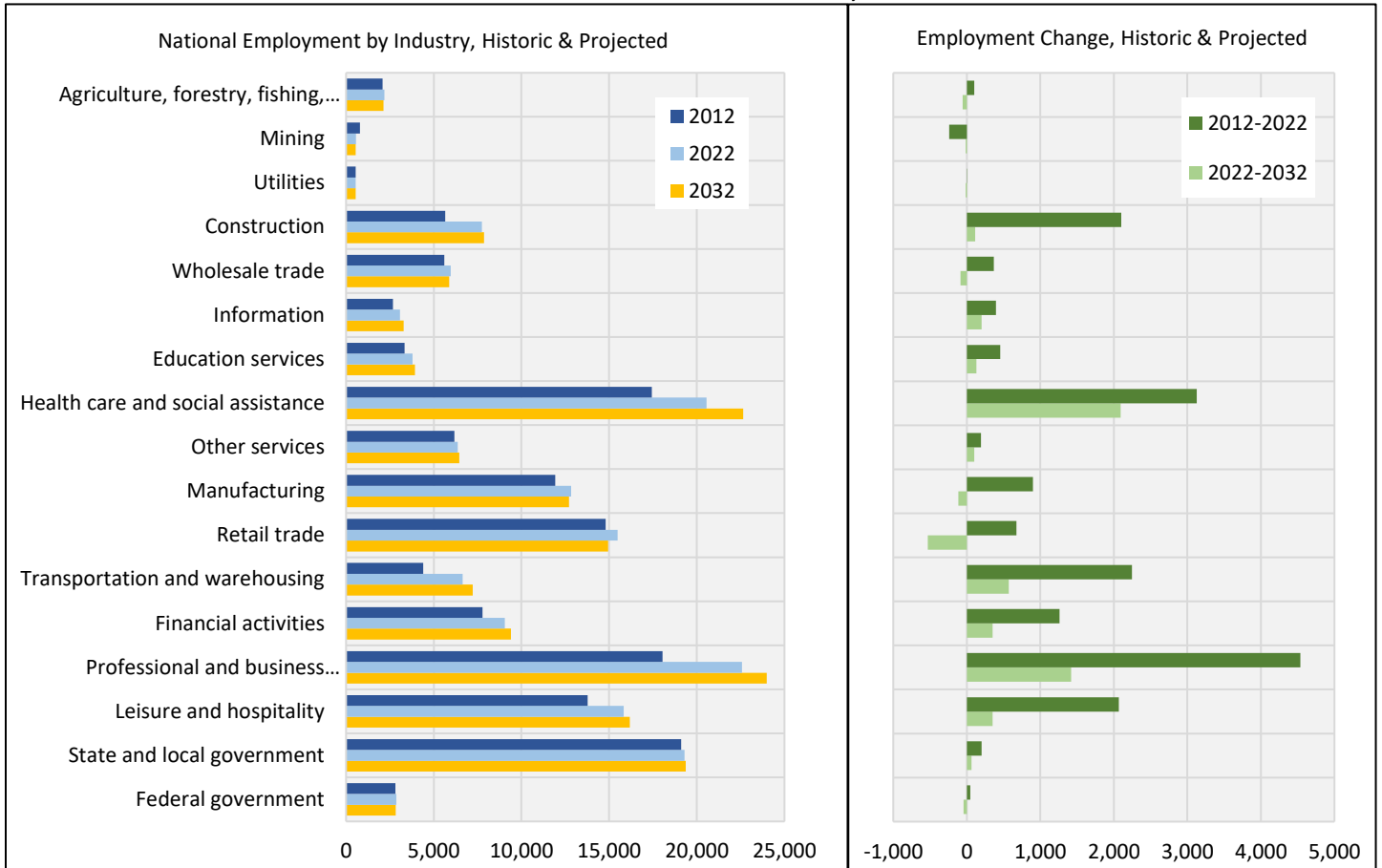
FIGURE 2.3: INFLATION INDEX VS. MEDIAN EARNINGS INDEX (Q1 2010 – Q1 2024)



Source: U.S. Federal Reserve Bank of St. Louis; Consumer Price Index for Urban Consumers (US); Median Earnings for Full-Time Employees, Seasonally Adjusted

Industry Sector Employment: At a national level healthcare & social assistance is projected to account for the largest share of new employment growth, followed by professional & business services, and leisure & hospitality. The aging of the population is expected to drive the healthcare sector over the next few decades.

FIGURE 2.4: NATIONAL EMPLOYMENT GROWTH BY SECTOR, HISTORIC AND PROJECTED

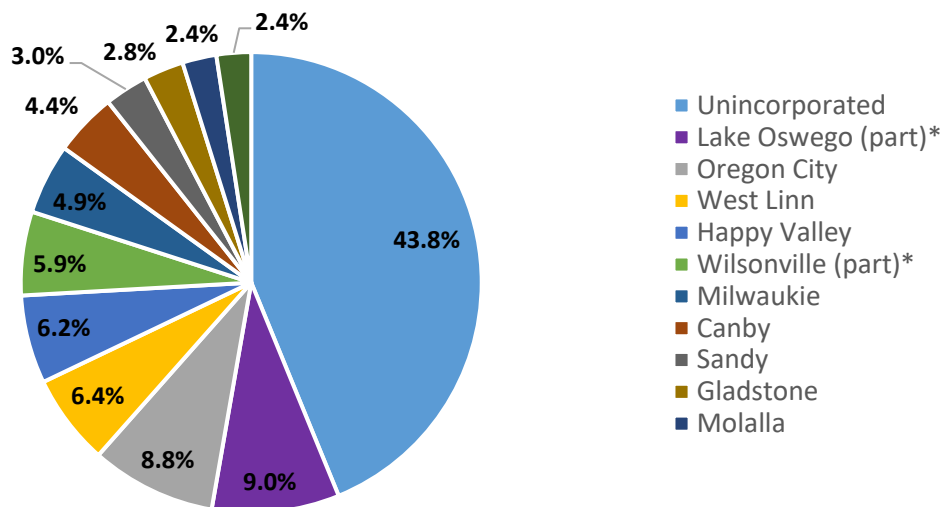


SOURCE: US Bureau of Labor Statistics

B. COUNTY AND LOCAL POPULATION AND WORKFORCE TRENDS

Population: Molalla makes up roughly 2.4% of Clackamas county’s population, with an estimated population of 10,335 people as of 2023 (the latest estimate available). The city has grown by an estimated 2,225 residents since 2010, at an estimated rate of 1.9% per year. This growth rate has outpaced the growth rates of the county (0.9%) and state (0.9%) in the same period.

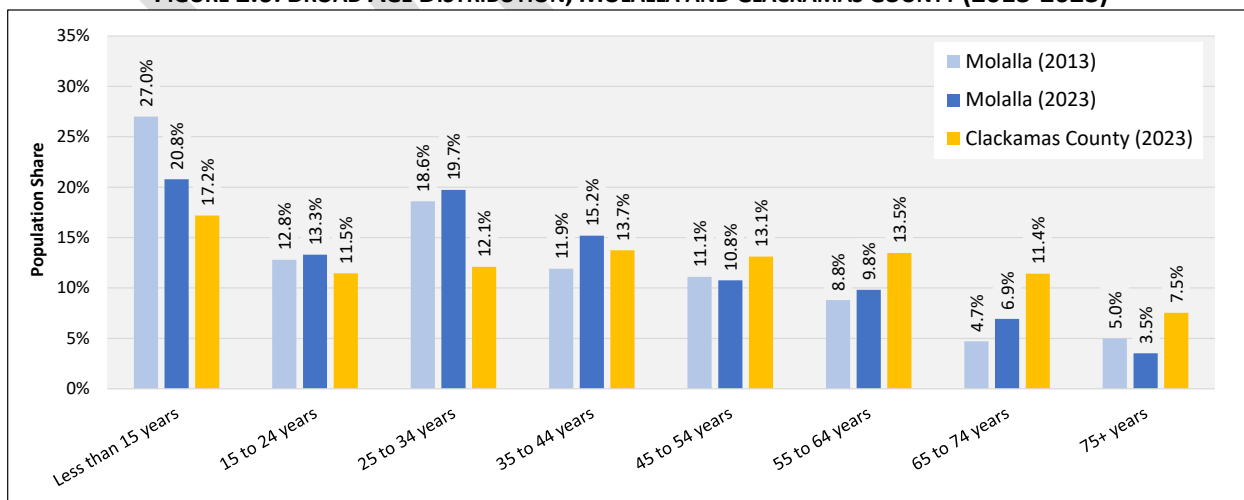
FIGURE 2.5: SHARE OF TOTAL POPULATION IN CLACKAMAS COUNTY (2023)



SOURCE: Population Research Center, Portland State University

Clackamas County’s population age distribution is fairly evenly distributed with no one age group far outnumbering the rest. Comparatively, Molalla’s age distribution is considerably more skewed towards the younger groups, with roughly 21% of the city’s population being under 15 years of age. While this remains the largest age segment, its share has fallen over the last ten years from an estimated 27%. An additional third (roughly 33%) of the city are between 15 and 34 years old.

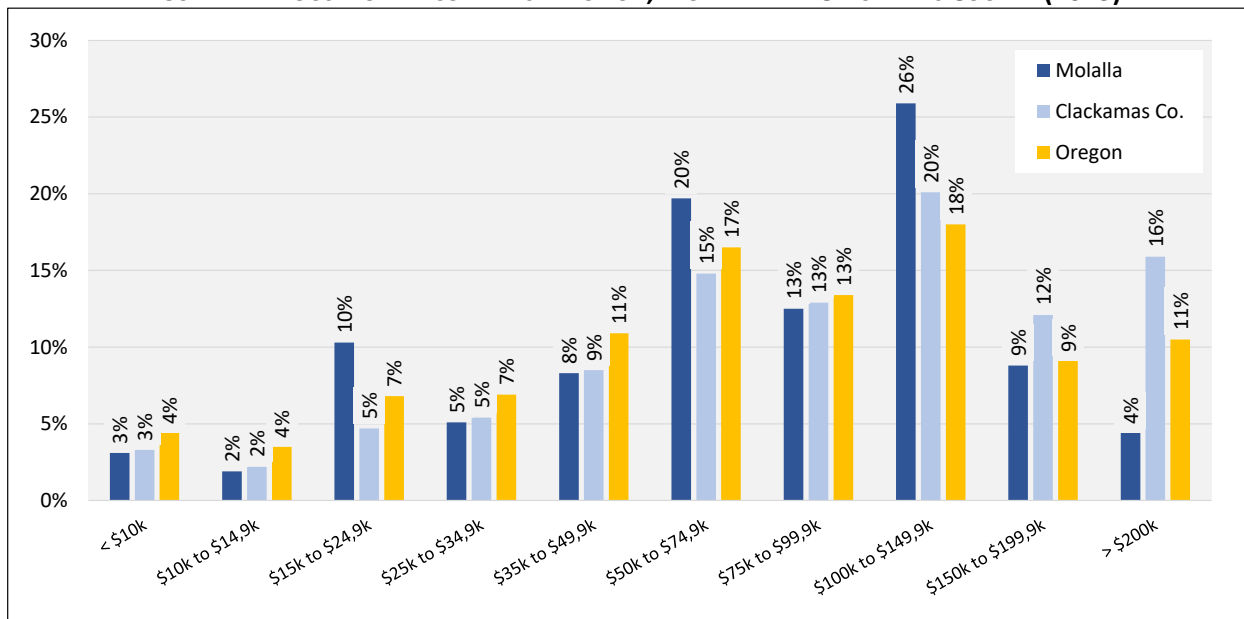
FIGURE 2.6: BROAD AGE DISTRIBUTION, MOLALLA AND CLACKAMAS COUNTY (2013-2023)



SOURCE: Population Research Center, Portland State University

Since 2013, the 35- to 44-year-old age cohort grew the most in share of total population in Molalla, while the 15 and younger group faced the biggest decrease. These trends reflect the aging of the Millennial and Baby Boom generations, increasing the share of population approaching middle age, and those aged 60 and older. A secular trend of falling fertility rates leads to fewer average children per family.

FIGURE 2.7: HOUSEHOLD INCOME DISTRIBUTION, MOLALLA AND CLACKAMAS COUNTY (2023)



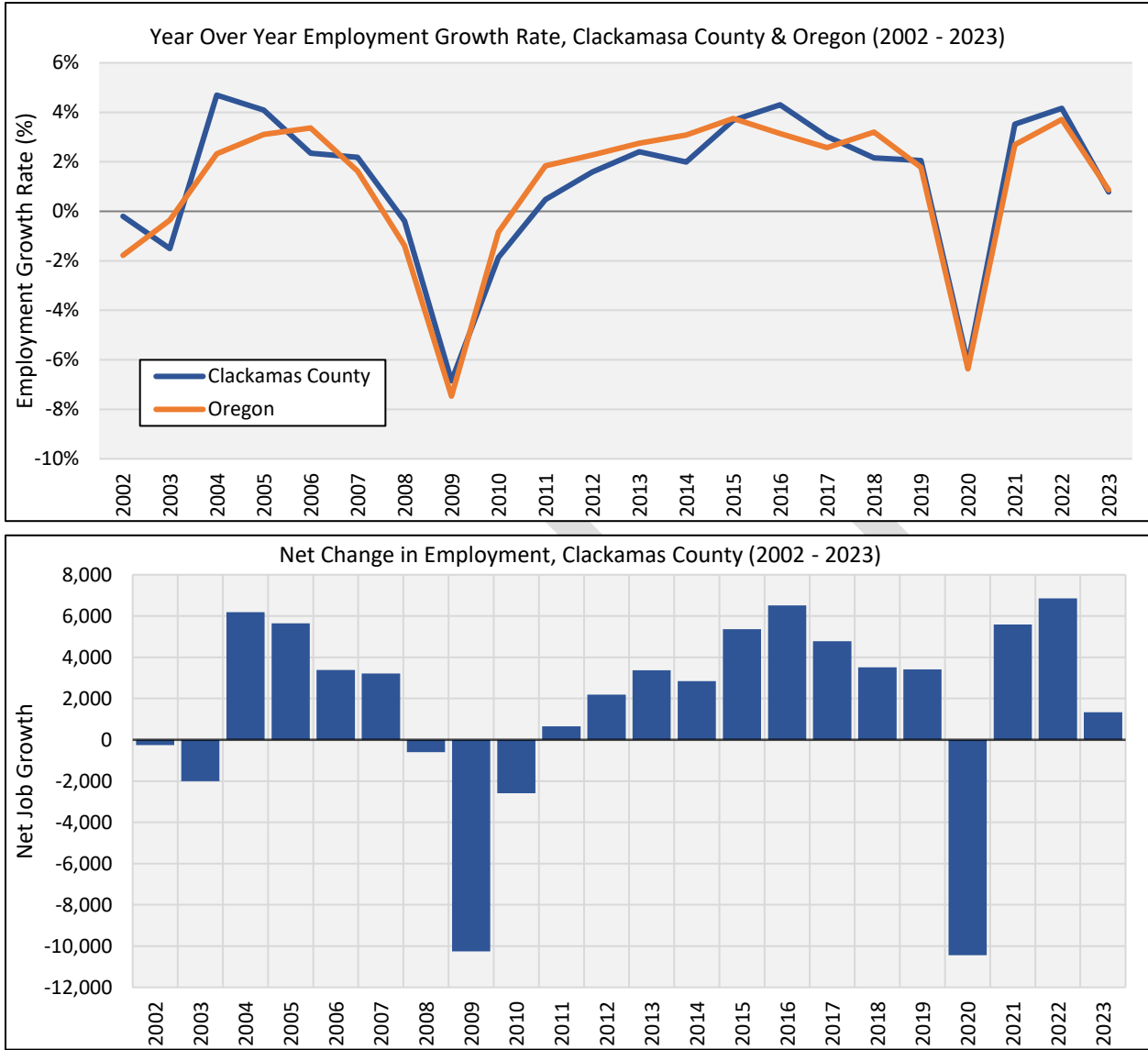
SOURCE: Census Bureau, ACS 5 Year Estimates

Figure 2.7 presents the estimated income distribution. Roughly 26% of Molalla’s and 20% of Clackamas County’s households earn between \$100k to \$149k, the largest share in both geographies, and greater than the statewide share. However, the city has a lower share of households earning more than \$150k.

Employment Growth: Clackamas County experienced slower employment growth relative to the state for most of the 2010’s. Following the ’08 – ’09 recession, the county did not return to positive growth until 2011 while the state saw positive employment growth in 2010. During this decade, Clackamas’ annual employment growth peaked at 4.3% in 2016 before decelerating up until the COVID-19 downturn. During the COVID-19 downturn, Clackamas County experienced a negative shock nearly identical with the state, losing about 6% of its employment base between 2019 and 2020. (Figure 2.8)

Since 2010, Clackamas County has added a net of roughly 30,000 jobs. The job growth peaked in 2015 with over 6,500 jobs added. In 2020, the county lost roughly 10,400 jobs, but recovered that employment over the next two years. (Figure 2.8)

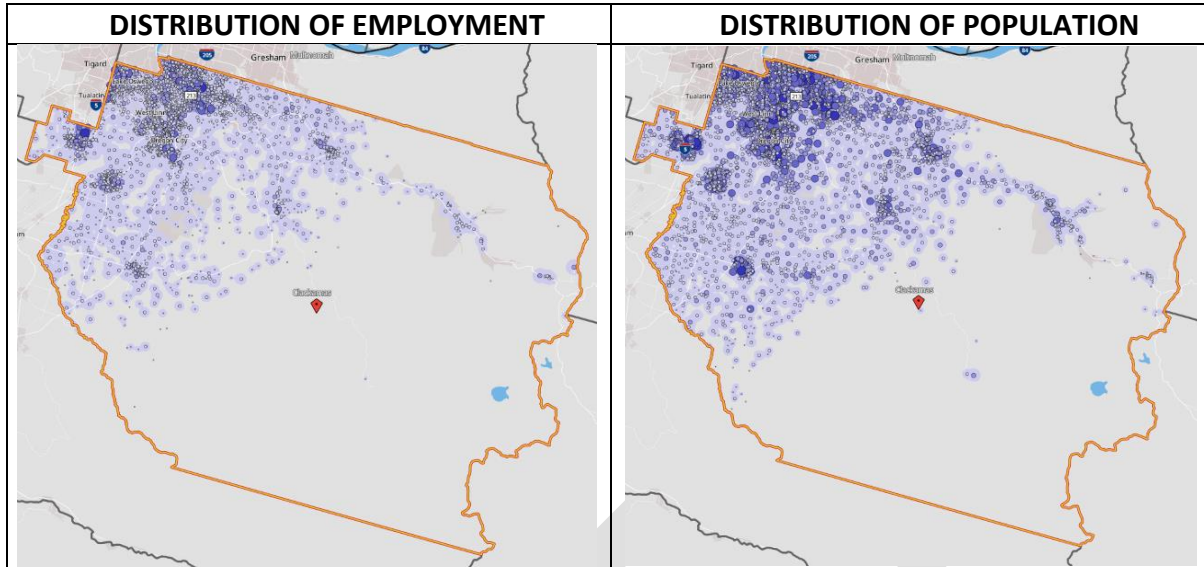
FIGURE 2.8: EMPLOYMENT GROWTH TRENDS, CLACKAMAS COUNTY & OREGON (2002 – 2023)



SOURCE: Oregon Employment Department, JOHNSON ECONOMICS

Employment and Population Concentrations: The distribution of employment in Clackamas County is concentrated in and around the Portland Metro area, as the largest regional hub of employment and economic activity (Figure 2.9). While population follows a similar pattern, there is a greater dispersion of residents outside of the Metro boundary than employment, indicating that many households live in more dispersed areas, and commute to employment centers.

FIGURE 2.9: DISTRIBUTION OF EMPLOYMENT AND WORKFORCE, CLACKAMAS COUNTY, 2021

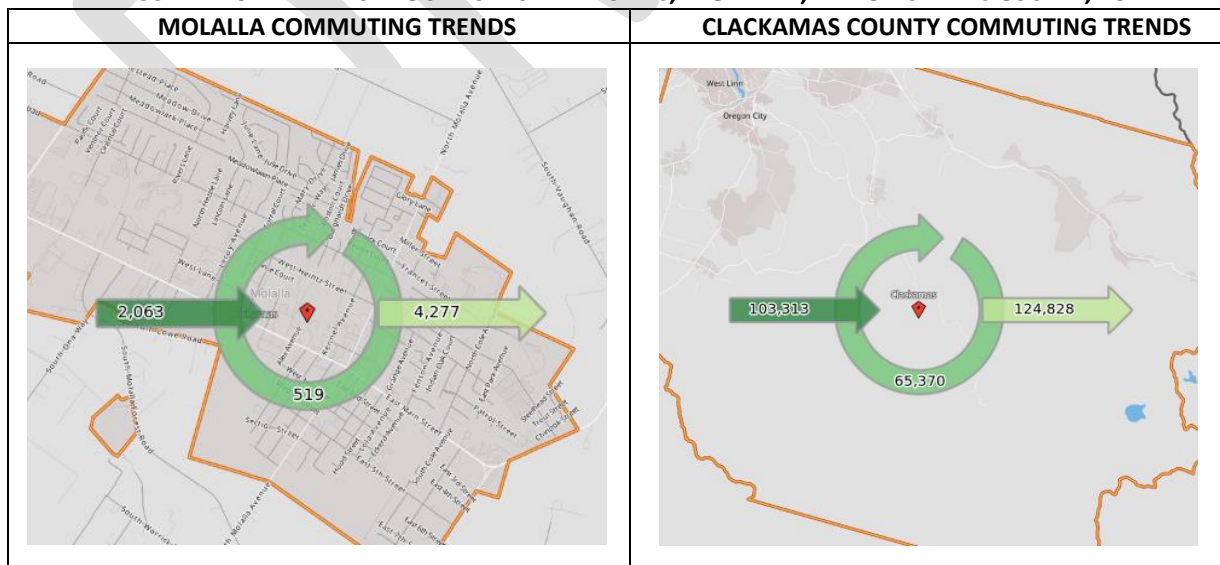


SOURCE: Census Bureau, Longitudinal Employer-Household Dynamics (LEHD) Data

Commuting Trends: In 2021 (the most recent data available), the city of Molalla was estimated to have roughly 2,060 people commuting in for work, 4,275 people commuting out and 520 residents both living and working in the city. This indicates that nearly 90% of working Molalla residents commute elsewhere for employment. These figures reflect “covered employment” as of 2021, the most recent year available. Covered employment refers to those jobs where the employee is covered by federal unemployment insurance. This category does not include many contract employees and the self-employed and therefore is not a complete picture of local employment. *The figure discussed here is best understood as indicators of the general pattern of commuting and not exact figures.*

Of those residents who work outside of the city, the most common commute destinations are Portland, Oregon City, Canby, and Salem. For local employees who commute in from outside of Molalla, most live in Salem, Portland, and Oregon City.

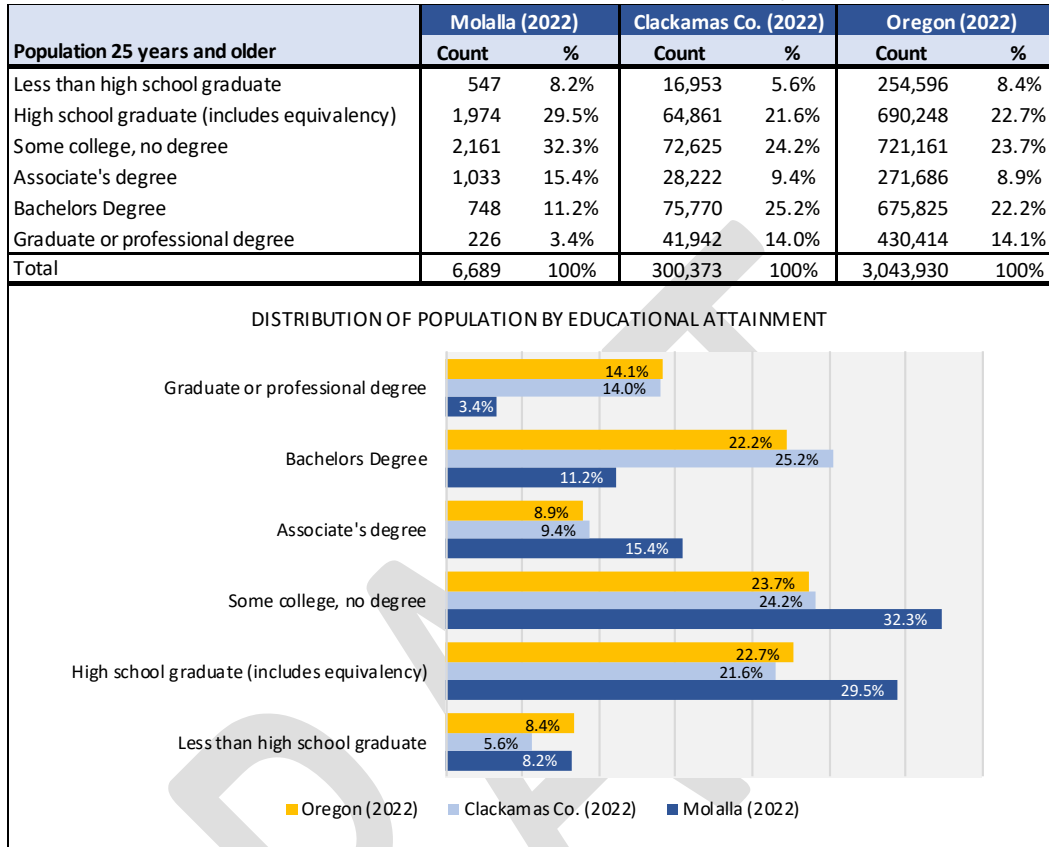
FIGURE 2.10: NET INFLOW-OUTFLOW OF EMPLOYEES, MOLALLA, AND CLACKAMAS COUNTY, 2021



SOURCE: Census Bureau, LEHD Data

Workforce Characteristics: Molalla has a greater share of less educated adults than the county or state (Figure 2.11).

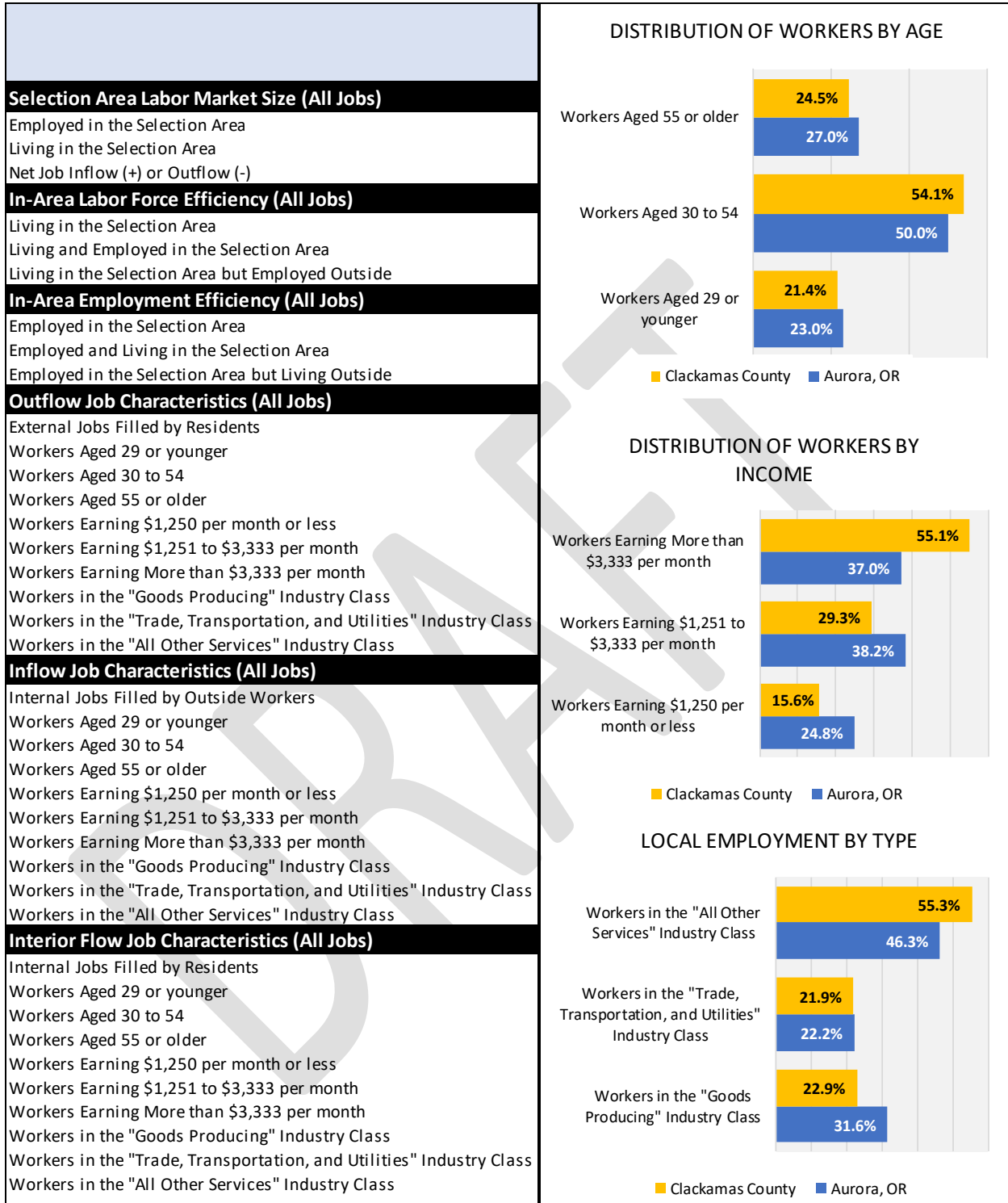
FIGURE 2.11: EDUCATIONAL ATTAINMENT PROFILE, 2022



SOURCE: U.S. Census Bureau, 2017 - 2022 ACS 5-Year Estimates

- Molalla’s adult population (aged 25 years and older) has relatively lower average education levels than the county or state. 62% of the population have a high school diploma, or some college with no degree, compared to 46% of the county and state.
- 30% of Molalla’s adult population have a degree, compared to 49% of the county and 45% of the state.
- Molalla has a higher share working in trade, transportation, and utilities (22.2%) and goods producing industries (31.6%) than the county (Figure 2.9). This includes retail, wholesale, warehousing, and shipping industries. (Figure 2.12)
- Molalla has a larger proportion of younger and near-retirement workers than the county, with 23% of its workers less than 30 years of age and 27% of its workers aged 55 or older.
- Working residents of Molalla are more likely to be in middle- and lower-income groups than the county. Roughly 24.8% of working Molalla residents earn over \$1,250 or less per month, and 38.2% earn between \$1,251 to \$3,333 per month.

FIGURE 2.12: CHARACTERISTICS OF LOCAL WORKFORCE, CITY OF MOLALLA AND CLACKAMAS COUNTY, 2021



SOURCE: US Census Bureau, LEHD Origin-Destination Employment Statistics

C. MOLALLA EMPLOYMENT & SECTOR SUMMARY

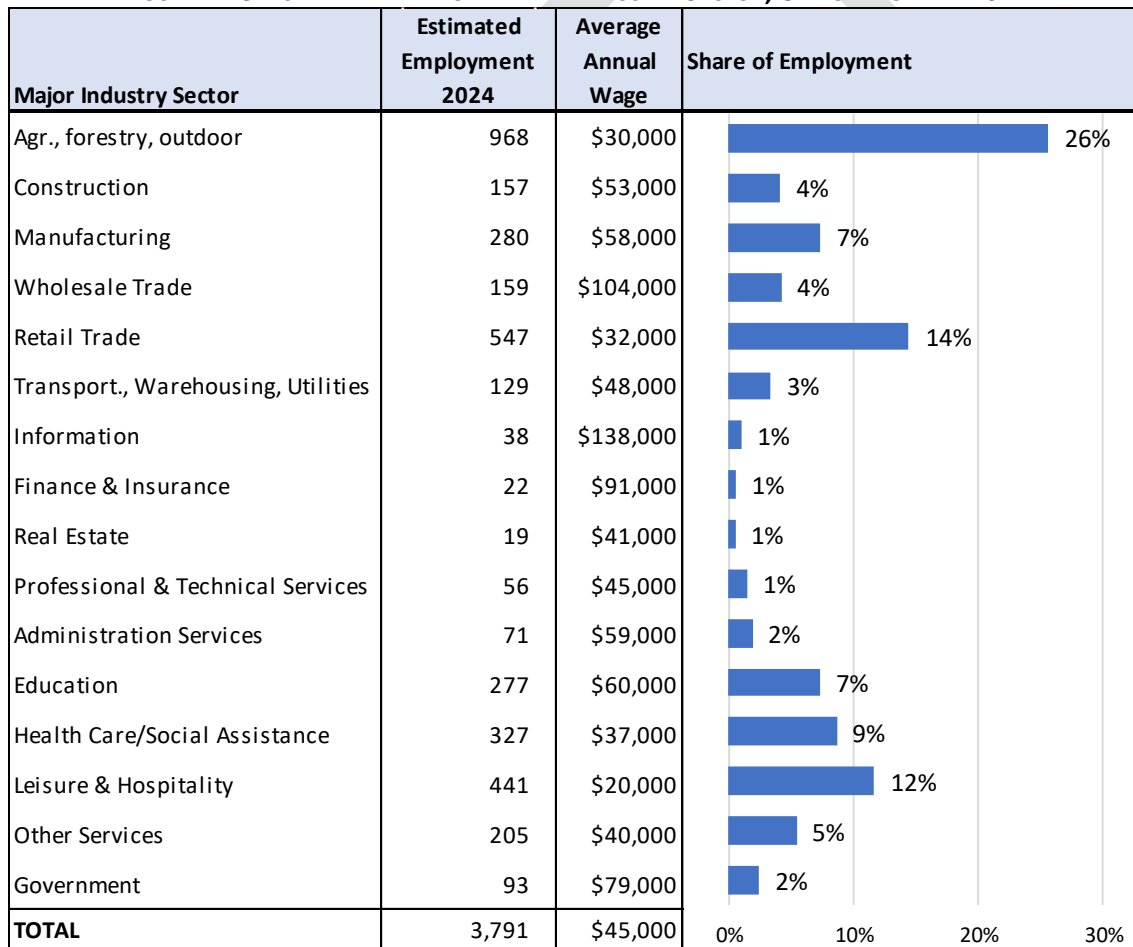
As of 2024, the City of Molalla is home to roughly 290 businesses with roughly 3,050 employees. There are an additional roughly 750 self-employed or sole-proprietor workers in the city, for a total of nearly 3,800 locally employed, or self-employed persons.

The largest industries by employment are “agriculture, forestry, fishing, and hunting”, retail trade, and leisure and hospitality (including dining). The manufacturing, health care & social assistance, and educational services sectors also have a notable employment base in the city. Molalla has the lowest employment representation in finance & insurance and real estate sectors, and no reported employment in the mining or utilities subsectors.

As for average annual wages, the highest paying sectors in 2024 are information, wholesale trade, and finance & insurance. The lowest paying sectors are “arts, entertainment, & recreation”, accommodation & food services, “agriculture, forestry, fishing, & hunting”, and retail trade.

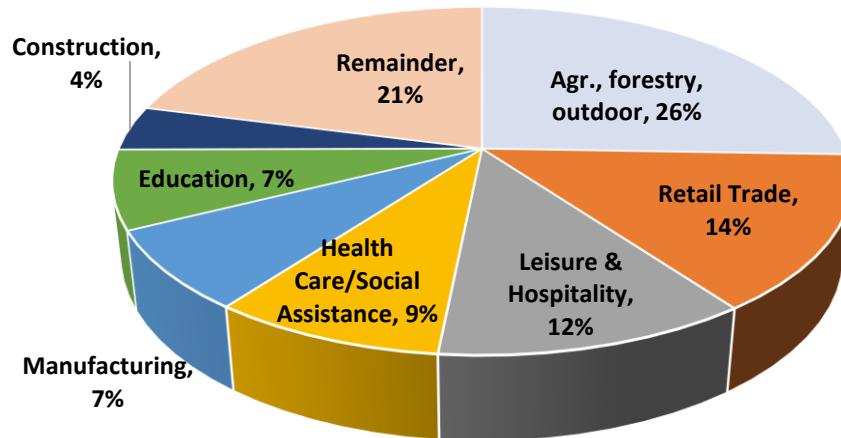
(Industry sectors are discussed in more detail in Section IV of this report.)

FIGURE 2.13: ESTIMATED EMPLOYMENT BY INDUSTRY SECTOR, CITY OF MOLALLA 2024



SOURCE: Oregon Employment Department, Bureau of Economic Analysis, Johnson Economics

FIGURE 2.14: ESTIMATED SHARE OF EMPLOYMENT BY INDUSTRY SECTOR, CITY OF MOLALLA 2024

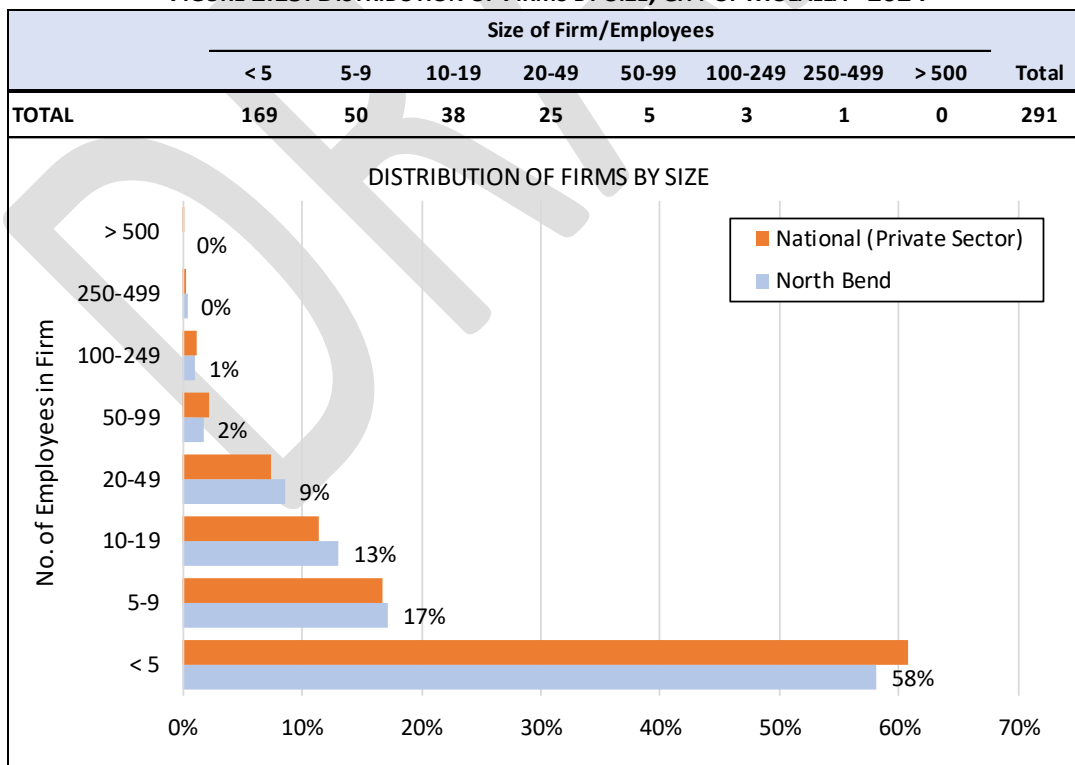


SOURCE: Oregon Employment Department, Bureau of Economic Analysis, Johnson Economics

The local employment base is dominated by relatively small firms, with nearly 90% of businesses having fewer than 20 employees (Figure 2.15). However, this trend is in keeping with the national average. Most businesses are small businesses. (This is based on the most recent 2022 QCEW data for unemployment-insurance covered employment, and therefore doesn't include all self-employment or owner/operator businesses.) Just 1% of firms have more than 100 employees. This is again, in keeping with national trends.

As of 2022, there were an estimated 291 firms in Molalla with covered employees (not including sole-proprietorships/self-employed).

FIGURE 2.15: DISTRIBUTION OF FIRMS BY SIZE, CITY OF MOLALLA - 2024



SOURCE: Oregon Employment Department, Johnson Economics

III. COMMUNITY ECONOMIC DEVELOPMENT POTENTIAL

The economic climate of a community helps foster growth of existing firms and industry clusters and make the area attractive for new businesses. The City of Molalla has several advantages that boost its potential as a location for current and future business.

Location: Molalla enjoys a location between agricultural and forest lands, and near the Portland Metro area. The community has grown as a center for housing, employment, commerce, and services for the central Clackamas County subregion. The community is served by state highway access in the north/south and east/west directions. It is roughly 15 miles from I-5 freeway access via Woodburn to the west, and 15 miles from the Portland Metro region, via Oregon City to the north. Molalla is within commuting distance to Salem, the Metro region, and other Willamette Valley communities.

The location puts the city's businesses in the middle of a subregional market area and available labor force. While the city provides many shopping, dining, and service options, there are others that are lacking in the community, and necessitate a trip to neighboring communities. At the same time, the location separate from the major metro areas has allowed the city to maintain a small town identity and establish a strong base of agricultural and wood products industries based in the surrounding natural resources.

Transportation Connectivity: Molalla has good highway access, at the crossroads of state highways 213 and 211. These provide access to the surrounding agricultural and forestry lands in central Clackamas County, as well as broader access to the I-5 corridor, and the eastern Metro area. Highway 211 also provides a route to Estacada, Sandy, and US Highway 26 to the northeast. These routes can suffer from congestion that extends driving times, especially during commuting hours.

Portland International Airport is located approximately forty-five minutes to the north providing global air connections. The Salem Municipal Airport has recently been in discussions to provide some commercial service to a limited number of southwest states, which would provide nearer access to residents and businesses in Molalla.

Labor Market: The availability of ample and skilled labor is a key factor in economic development potential. It is estimated that nearly 90% of working Molalla residents commute elsewhere for their primary employment. This means that the community is likely home to a broader range of skills and specialties than just those found among local employers. This represents a diverse talent pool and skillset from which new businesses locating and growing in the city could draw.

Beyond the talent pool of Molalla residents, the city's highway access gives local businesses the ability to draw on a larger labor pool from the region. An estimated 80% of the local workforce commutes in to Molalla, with the greatest numbers coming from Salem, Portland, Woodburn, Oregon City, and Canby. While ideally these workers may eventually choose to relocate to the community, in the meantime businesses know they can attract workers with a full range of skills and experience from a broader area if necessary.

The "Mid-Willamette Valley Supply and Target Industry Growth Recommendations for Clackamas, Polk and Yamhill Counties" (2014) report identified workforce issues in Clackamas, Polk, and Yamhill counties. These issues included finding qualified workers with the proper basic and technical skills, training entry-level workers effectively, and successfully employing contractors from staffing agencies. These issues remain a challenge in many regions across Oregon and call for broader solutions with the city's economic development partners.

Quality of Life: Molalla offers a high quality of life and suburban amenities to attract new workers and businesses to the city. The city offers a mixture of small-town lifestyle, diverse cultural activities, with access to nature and rural amenities, while also being a quick trip away from larger metro areas with additional urban amenities. The community features relatively affordable housing in comparison to other parts of the region, good schools, parks, and shopping and local services for most daily needs.

Molalla's location in the Willamette Valley offers ready access to a full range of mountain recreation to the east, and Oregon's wine country to the west.

Economic Development Partnerships: Molalla has several partners in economic development, including the local Chamber of Commerce, SEDCOR, Clackamas County, and Business Oregon. Molalla is within roughly 15 miles of outposts of both Clackamas and Chemeketa Community College to offer ongoing education and training to the local workforce.

Local and regional employers are also key partners in promoting and growing their industries. Molalla works with these and other regional partners to provide the infrastructure and services needed to retain and attract businesses to the city.

Economic Development Tools: Molalla features an Enterprise Zone which allows for tax abatements to incentivize new business development across major commercial and industrial sections of the city, including the downtown. Molalla also maintains an Urban Renewal area that covers the downtown area, and much of the Highway 211 corridor, extending to highway 213, among other corridors. The urban renewal agency can offer incentives for development, secure key economic development sites, among other projects.

IV. INDUSTRY DIFFERENTIATION ANALYSIS

This element of the Economic Opportunities Analysis utilizes analytical tools to assess the economic landscape in Clackamas County and the City of Molalla. The objective of this process is to identify a range of industry types that can be considered targeted economic opportunities over the planning period.

A range of analytical tools to assess the local and regional economic landscape are used to determine the industry typologies the city should consider targeting over the planning period. Where possible, we look to identify the sectors that are likely to drive growth in current and subsequent cycles.

ECONOMIC SPECIALIZATION (CLACKAMAS COUNTY)

A common analytical tool to evaluate economic specialization is location quotient analysis. This metric compares the concentration of employment in an industry at the local level to a larger geography. All industry categories are assumed to have a quotient of 1.0 on the national level, and a locality's quotient indicates if the local share of employment in each industry is greater or less than the share seen nationwide. For instance, a quotient of 2.0 indicates that locally, that industry represents twice the share of total employment as seen nationwide. A quotient of 0.5 indicates that the local industry has half the expected employment.

A location quotient analysis was completed for Clackamas County, which evaluated the distribution of local employment relative to national averages, as well as average annual wage levels by industry (Figure 4.1). The industries that are well-represented countywide are good candidates for growth in localities such as Molalla as the city has the ability to tap into regional advantages to grow locally.

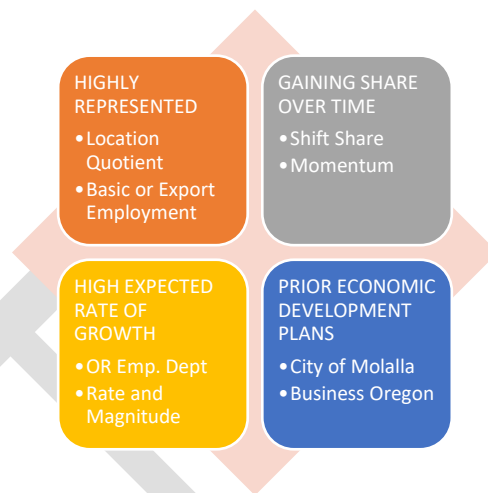


FIGURE 4.1: INDUSTRY SECTOR SPECIALIZATION BY MAJOR INDUSTRY, CLACKAMAS COUNTY, 2022

Industry	Annual Establishments	Average Employment	Total Annual Wages	Average Annual Wages	Employment LQ
102 Service-providing	14407	117,463	\$7,620,027,186	\$64,872	0.96
101 Goods-producing	3,179	37,686	\$2,640,181,944	\$70,057	1.48
1011 Natural resources and mining	389	4,673	\$202,637,060	\$43,365	2.25
1012 Construction	2,057	15,192	\$1,106,928,565	\$72,865	1.72
1013 Manufacturing	733	17,822	\$1,330,616,319	\$74,661	1.22
1021 Trade, transportation, and utilities	2,590	33,948	\$2,083,407,387	\$61,370	1.04
1022 Information	480	2,643	\$294,869,919	\$111,587	0.76
1023 Financial activities	1,611	7,918	\$771,058,869	\$97,383	0.8
1024 Professional and business services	3158	24,425	\$2,084,308,856	\$85,334	0.95
1025 Education and health services	2,642	24,553	\$1,592,778,916	\$64,872	0.92
1026 Leisure and hospitality	1208	16,740	\$471,365,906	\$28,159	0.93
1027 Other services	1,622	6,735	\$280,288,847	\$41,619	1.34
1029 Unclassified	1097	502	\$41,948,486	\$83,535	1.49
Total	17,587	155,151	\$10,260,209,130	\$66,130	

SOURCE: U.S. Bureau of Labor Statistics

In general, the County has stronger representation among goods-producing sectors than service-producing sectors, relative to nationally. Among major industries, the natural resources & mining industry was the most strongly represented, with the construction industry being the next. Construction, Manufacturing and other types of services each have representation somewhat higher than the national average. The information and financial activities industries were the most under-represented major industries. The information sector provided the highest average wages among these industries (\$112k/year), while the other services industry has the lowest average wages (\$42k/year).

A more detailed industry analysis shows that the industries with the highest LQ in the county are “agriculture, forestry, fishing, and hunting”, construction, wholesale trade, and unclassified workers. Health care & social assistance, retail trade, and manufacturing employ the most people out of all the industries, employing a little over a third of the county’s entire employment base. The most under-represented industries are utilities, federal and state government, and mining. (Figure 4.2 includes government employment as well.)

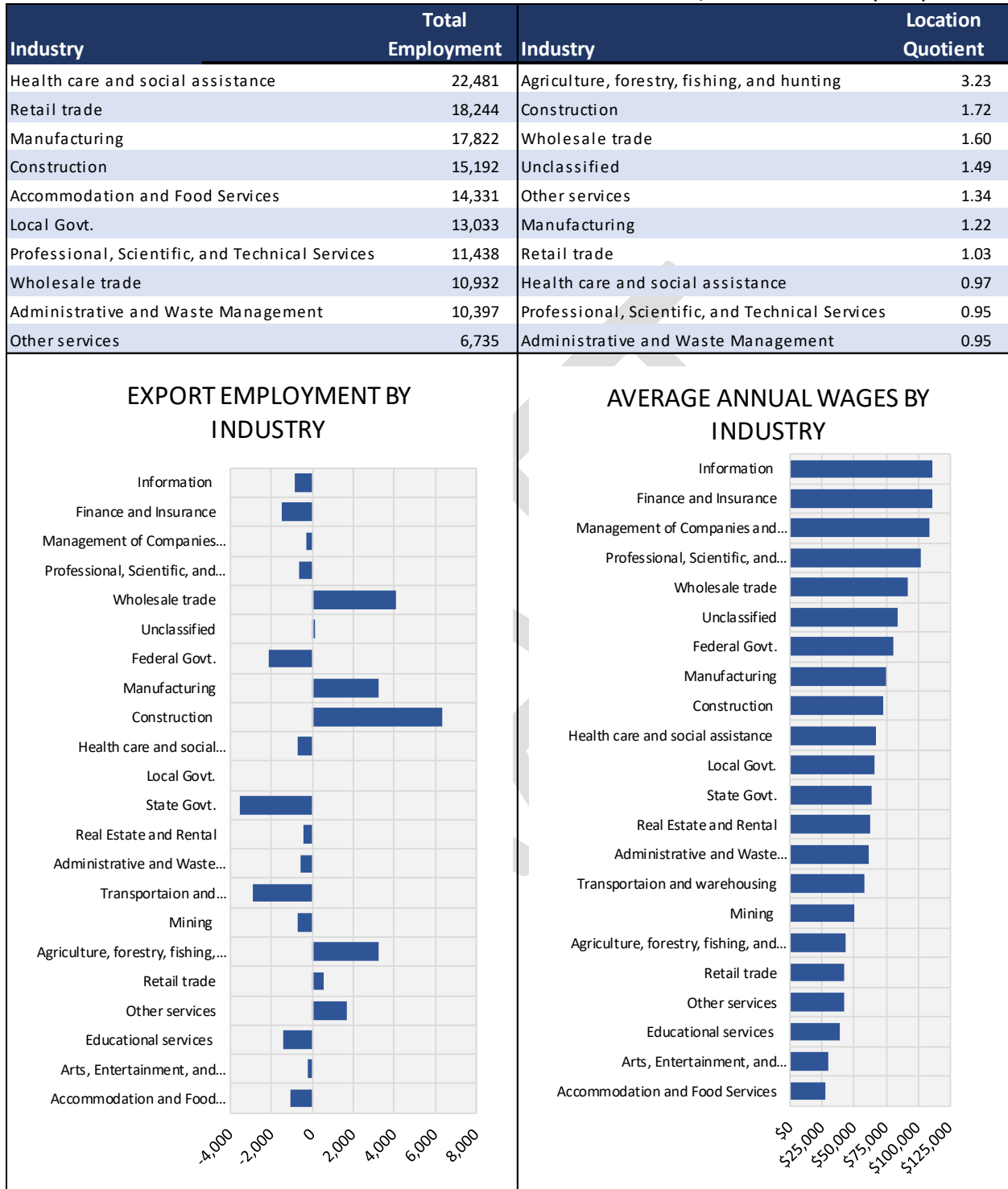
FIGURE 4.2: INDUSTRY SECTOR SPECIALIZATION BY DETAILED INDUSTRY, CLACKAMAS COUNTY, 2022

Industry	Annual Establishments	Average Employment	Total Annual Wages	Average Annual Wages	Employment LQ
Agriculture, forestry, fishing, and hunting	384	4,645	\$201,222,408	\$43,320	3.23
Mining	5	28	\$1,414,652	\$50,523	0.04
Utilities	16	298	\$36,920,679	\$123,895	0.47
Construction	2,057	15,192	\$1,106,928,565	\$72,863	1.72
Manufacturing	733	17,822	\$1,330,616,319	\$74,661	1.22
Wholesale trade	1,102	10,932	\$1,011,208,904	\$92,500	1.6
Retail trade	1125	18,244	\$777,672,778	\$42,626	1.03
Transportation and warehousing	347	4,475	\$257,605,026	\$57,565	0.61
Information	480	2,643	\$294,869,919	\$111,566	0.76
Finance and Insurance	905	5,666	\$630,017,931	\$111,193	0.79
Real Estate and Rental	706	2,252	\$141,040,938	\$62,629	0.84
Professional, Scientific, and Technical Services	2,127	11,438	\$1,169,298,119	\$102,229	0.95
Management of Companies and Enterprises	141	2,590	\$281,333,541	\$108,623	0.9
Administrative and Waste Management	890	10,397	\$633,677,196	\$60,948	0.95
Educational services	238	2,072	\$80,957,209	\$39,072	0.6
Health care and social assistance	2,405	22,481	\$1,511,821,707	\$67,249	0.97
Arts, Entertainment, and Recreation	215	2,409	\$71,302,136	\$29,598	0.91
Accommodation and Food Services	994	14,331	\$400,063,770	\$27,916	0.93
Other services	1622	6,735	\$280,288,847	\$41,617	1.34
Unclassified	1097	502	\$41,948,486	\$83,563	1.49
Federal Govt.	50	1,141	\$91,420,549	\$80,123	0.35
State Govt.	31	1,641	\$104,538,207	\$63,704	0.32
Local Govt.	198	13,033	\$866,580,255	\$66,491	0.82
Total	17,868	170,967	\$11,322,748,141	\$66,228	

SOURCE: U.S. Bureau of Labor Statistics

The level of indicated export employment is estimated by sector by combining the location quotients and overall employment levels. Export industries are important in that they grow the overall size of the local economy by bringing in dollars from outside the community, rather than recirculating internal spending. Clackamas County only has seven industries that had positive export employment in 2022: construction, wholesale trade, agriculture, other services, retail trade, and unclassified workers (in order from highest to lowest positive export employment).

FIGURE 4.3: TOP TEN INDUSTRIES IN TERMS OF TOTAL AND EXPORT EMPLOYMENT, CLACKAMAS COUNTY (2022)



SOURCE: U.S. Bureau of Labor Statistics

ECONOMIC SPECIALIZATION (CITY OF MOLALLA)

The same analysis applied to the City of Molalla reveals high levels of employment concentration in industries such as agriculture, educational services, wood manufacturing, other services, and retail trade. In terms of employment concentration, agriculture far outperforms any other industries in the city with a location quotient (LQ) of 28.5, with the next highest employment concentration in the city being education services with a LQ of 3.4, and wood manufacturing with a LQ of 2.6. [Figure 4.2 presents data based on *covered employment* from 2022 (the most recent year available), not including self-employment.]

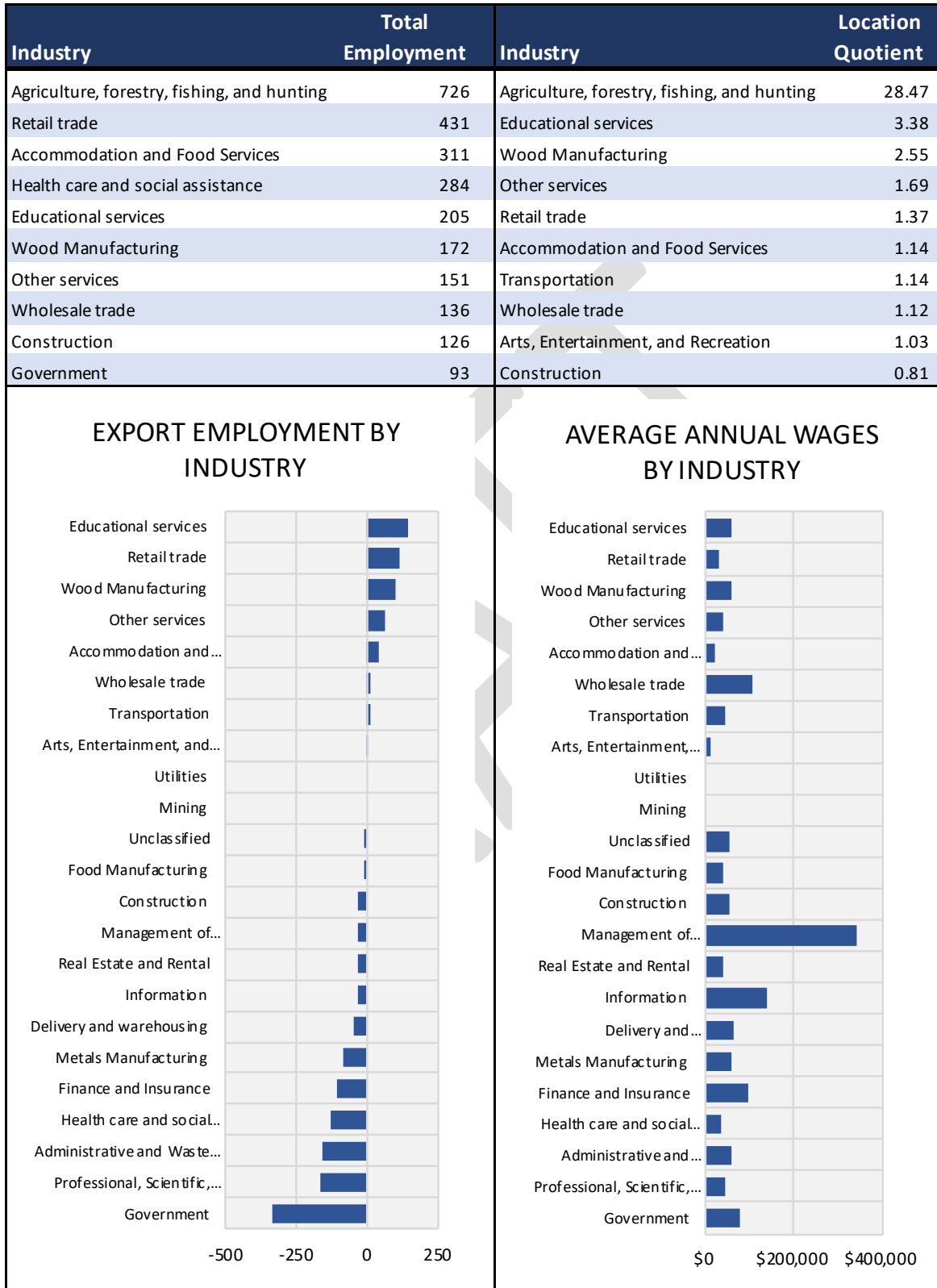
FIGURE 4.4: INDUSTRY SECTOR SPECIALIZATION BY DETAILED INDUSTRY, CITY OF MOLALLA, 2022

Industry	Annual Establishments	Average Employment	Total Annual Wages	Average Annual Wages	Employment LQ
Agriculture, forestry, fishing, and hunting	14	726	\$21,470,928	\$29,574	28.47
Mining	0	0	\$0	\$0	0.00
Construction	37	126	\$6,763,733	\$53,680	0.81
Food Manufacturing	3	35	\$1,411,010	\$40,315	0.74
Wood Manufacturing	3	172	\$10,524,733	\$61,190	2.55
Metals Manufacturing	6	61	\$3,554,808	\$58,276	0.42
Utilities	0	0	\$0	\$0	0.00
Wholesale trade	11	136	\$14,192,868	\$104,359	1.12
Retail trade	27	431	\$13,801,890	\$32,023	1.37
Transportation	13	79	\$3,554,413	\$44,993	1.14
Delivery and warehousing	1	17	\$1,085,718	\$63,866	0.28
Information	3	27	\$3,731,841	\$138,216	0.44
Finance and Insurance	8	20	\$1,914,161	\$95,708	0.16
Real Estate and Rental	9	15	\$607,949	\$40,530	0.32
Professional, Scientific, and Technical Service	15	46	\$2,116,179	\$46,004	0.22
Management of Companies and Enterprises	2	19	\$6,504,641	\$342,350	0.37
Administrative and Waste Management	10	35	\$2,080,197	\$59,434	0.18
Educational services	5	205	\$12,264,813	\$59,828	3.38
Health care and social assistance	41	284	\$10,533,807	\$37,091	0.69
Arts, Entertainment, and Recreation	4	48	\$613,208	\$12,775	1.03
Accommodation and Food Services	30	311	\$6,341,262	\$20,390	1.14
Other services	39	151	\$6,057,328	\$40,115	1.69
Government	3	93	\$7,371,629	\$79,265	0.22
Unclassified	0	2	\$109,064	\$54,532	0.33
Total	284	3,039	\$136,606,180	\$44,951	

SOURCE: Oregon Employment Department

The top industries in terms of overall employment in 2022 were agriculture, retail trade, accommodation & food services, health care & social services, and educational services. The city were eight industries with positive export employment, the largest being educational services, retail trade, and wood manufacturing. As for the industries with the highest average annual wages, three industries stood out in particular. These were the management of company & enterprises, information, and wholesale trade industries. All three of these industries paid an annual average wage of above \$100k a year. (The management of company & enterprises sector was estimated to pay a very high average salary, but this is likely distorted due to small sample size.)

FIGURE 4.5: TOP TEN INDUSTRIES IN TERMS OF TOTAL AND EXPORT EMPLOYMENT, CITY OF MOLALLA (2022)



SOURCE: Oregon Employment Department and Bureau of Labor Statistic

ECONOMIC DRIVERS

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, we employ a shift-share analysis of the local economy emerging out of the latter half of the recent expansion cycle¹.

A shift-share analysis 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 growth can be attributed to unique regional competitiveness or 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.

We can generally classify industries, groups of industries, or clusters into four groups:

Growing, Outperforming: Industries that are growing locally at a rate faster than the national average. These industries have characteristics locally leading them to be particularly competitive.

Growing, Underperforming: Industries that are growing locally but slower than the national average. These industries generally have a sound foundation, but some local factors are limiting growth.

Contracting, Outperforming: Industries that are declining locally but slower than the national average. These industries have structural issues that are impacting growth industry wide. However, local firms are leveraging some local or regional factor that is making them more competitive than other firms on average.

Contracting, Underperforming: Industries that are declining locally at a rate faster than the national average. These industries have structural issues that are impacting growth industry wide. However, some local or regional factors are making it increasingly tough on local firms.

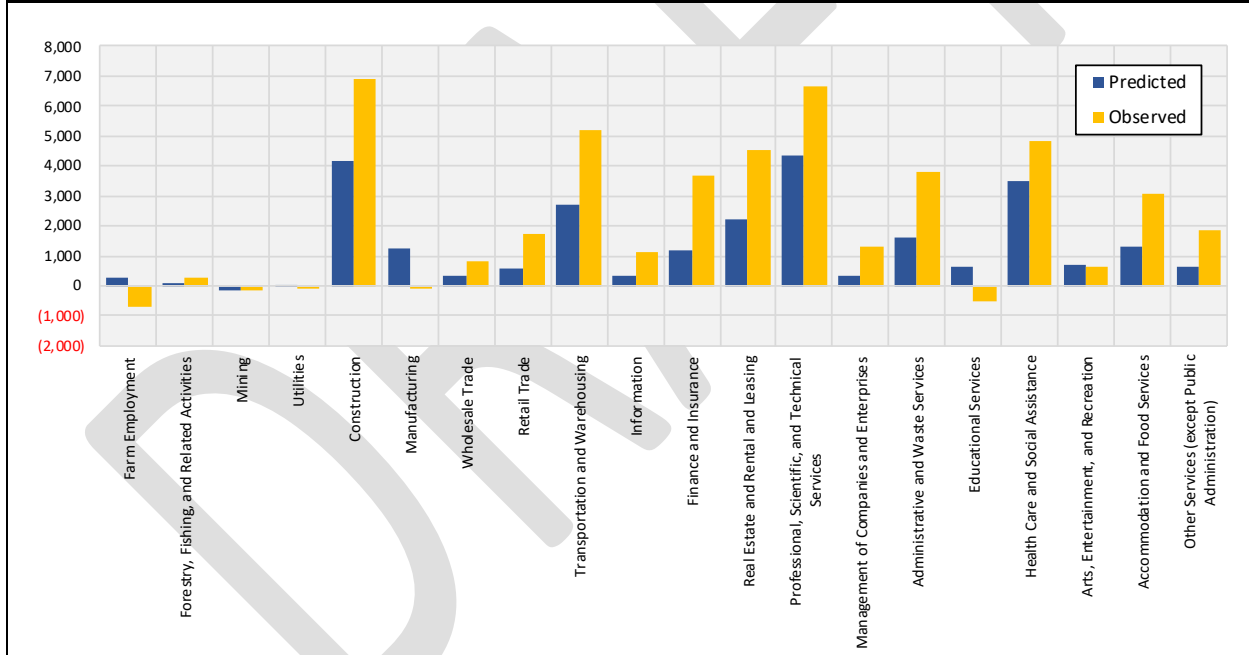
The average annual growth rate by industry from 2013 to 2022 (the latest available data) in Clackamas County was compared to the national rate. The observed local change was compared to a standardized level reflecting what would be expected if the local industry grew at a rate consistent with national rates for that industry.

As shown in Figure 4.6, more county industries grew at a faster rate than the rest of the country than those that grew at a slower rate. Sectors that experienced the most notable positive regional shift in employment during this period were construction, transportation & warehousing, finance & insurance, real estate & rental leasing, and professional services, and accommodation & food services. Only five county sectors experienced a negative regional shift in employment, these being manufacturing, educational services, farm employment, utilities, “arts, entertainment, & recreation” and mining.

¹ Measured from 2013 through 2022

FIGURE 4.6: INDUSTRY SECTOR SHIFT SHARE ANALYSIS, CLACKAMAS COUNTY (2013 – 2022)

Industry	Average Employment		Net Change		Standardized Level - 2022*	Regional Shift
	2013	2022	Total	AAGR		
Farm Employment	6,784	6,092	(692)	-1.2%	7,053	(961)
Forestry, Fishing, and Related Activities	1,845	2,142	297	1.7%	1,918	224
Mining	475	319	(156)	-4.3%	325	(6)
Utilities	387	341	(46)	-1.4%	391	(50)
Construction	12,845	19,751	6,906	4.9%	17,027	2,724
Manufacturing	19,379	19,374	(5)	0.0%	20,614	(1,240)
Wholesale Trade	12,287	13,085	798	0.7%	12,618	467
Retail Trade	22,554	24,315	1,761	0.8%	23,161	1,154
Transportation and Warehousing	5,275	10,499	5,224	7.9%	7,973	2,526
Information	2,833	3,931	1,098	3.7%	3,196	735
Finance and Insurance	10,745	14,412	3,667	3.3%	11,952	2,460
Real Estate and Rental and Leasing	12,382	16,891	4,509	3.5%	14,585	2,306
Professional, Scientific, and Technical Services	14,586	21,230	6,644	4.3%	18,928	2,302
Management of Companies and Enterprises	1,743	3,082	1,339	6.5%	2,091	991
Administrative and Waste Services	10,414	14,193	3,779	3.5%	12,010	2,183
Educational Services	4,438	3,942	(496)	-1.3%	5,057	(1,115)
Health Care and Social Assistance	22,080	26,933	4,853	2.2%	25,571	1,362
Arts, Entertainment, and Recreation	4,972	5,622	650	1.4%	5,655	(33)
Accommodation and Food Services	12,801	15,873	3,072	2.4%	14,111	1,762
Other Services (except Public Administration)	10,857	12,715	1,858	1.8%	11,524	1,191
TOTAL	189,682	234,742	45,060	2.4%	215,760	18,982

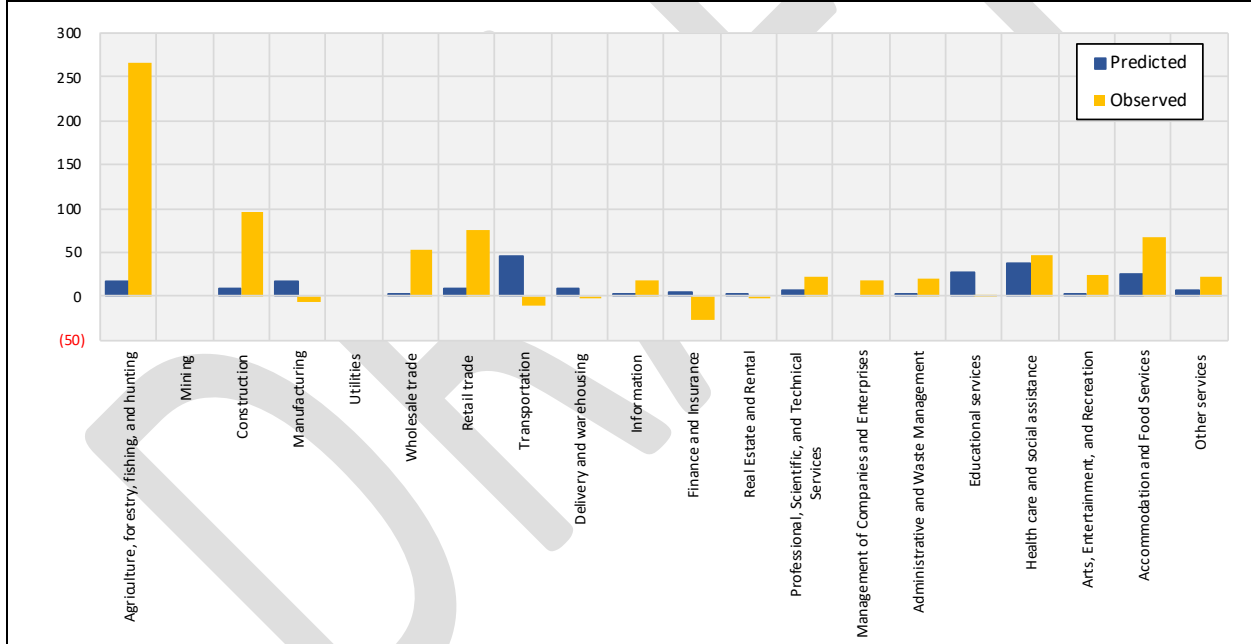


* Employment level in each industry had it grown at the same rate as its counterparts at the national level over the same period.
 SOURCE: U.S. Department of Commerce, Bureau of Economic Analysis, Bureau of Labor Statics, Oregon Employment Department

When the same analysis is applied to the city of Molalla (Figure 4.7), most of the city’s industries also displayed faster growth than the rest of the country. The most notable sector on this measure in the local economy was the agriculture and forestry sectors followed by construction, retail trade, and wholesale trade. These sectors grew faster than expected based on the national pace.

FIGURE 4.7: INDUSTRY SECTOR SHIFT SHARE ANALYSIS, CITY OF MOLALLA (2013 – 2022)

Industry	Average Employment		Net Change		Standardized Level - 2022*	Regional Shift
	2013	2022	Total	AAGR		
Agriculture, forestry, fishing, and hunting	460	726	266	5.2%	478	248
Mining	0	0	0	0.0%	0	0
Construction	29	126	97	17.7%	38	88
Manufacturing	274	268	(6)	-0.2%	291	(23)
Utilities	0	0	0	0.0%	0	0
Wholesale trade	82	136	54	5.8%	85	51
Retail trade	356	431	75	2.1%	366	65
Transportation	89	79	(10)	-1.3%	135	(56)
Delivery and warehousing	18	17	(1)	-0.6%	27	(10)
Information	9	27	18	13.0%	10	17
Finance and Insurance	46	20	(26)	-8.8%	51	(31)
Real Estate and Rental	17	15	(2)	-1.4%	20	(5)
Professional, Scientific, and Technical Services	24	46	22	7.5%	31	15
Management of Companies and Enterprises	0	19	19	38.7%	0	19
Administrative and Waste Management	14	35	21	10.7%	16	19
Educational services	204	205	1	0.1%	232	(27)
Health care and social assistance	237	284	47	2.0%	274	10
Arts, Entertainment, and Recreation	23	48	25	8.5%	26	22
Accommodation and Food Services	243	311	68	2.8%	268	43
Other services	128	151	23	1.9%	136	15
TOTAL	2,253	2,944	691	3.0%	2,486	458



* 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

Growth and Current Strength Analysis

This analysis takes a look at the relationship between the location quotient of an industry and its employment growth (shift share) over the years to give useful insight into an industry's competitive performance. As mentioned above, location quotients are a metric that compares a local industry's employment concentration to the nation's employment concentration of the same industry. A quotient above 1 indicates that an industry has more local representation compared to what is expected nationally while a quotient less than 1 indicates that the local industry has less than the expected employment. When an industry's LQ is compared alongside its employment growth one can identify which industries in the region have been highly competitive, showing signs of growth, decreasing in competitiveness, or underperforming.

Much like the shift share analysis, this analysis separates industries/clusters into 4 categories² :

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.

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.

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.

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.

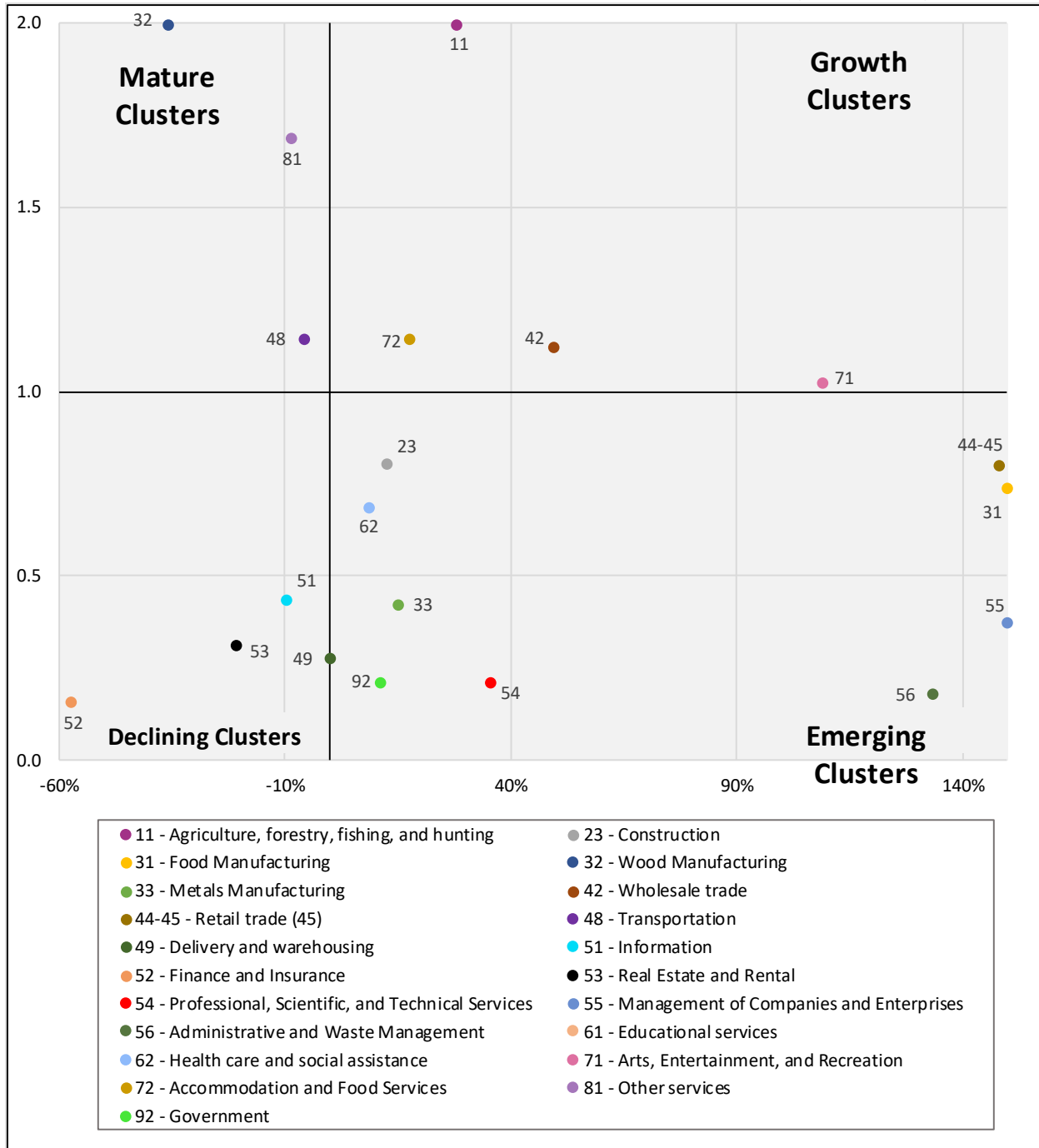
The figure 4.8 below depicts this relationship in the city of Molalla during the 2013 – 2022 period. A majority of industries showed positive employment growth in the last decade, placing them in the growth and emerging clusters. However, more industries have an LQ lower than 1, indicating that industries within Molalla are less concentrated than what is expected on the national level.

The construction, retail trade (NAICS 45), and food manufacturing industries are notably the closest to crossing the threshold from being an “emerging” industry into becoming a “growth” industry as they have displayed healthy employment growth with LQ's close to 1 as of 2022. The industries with the highest local concentrations are wood manufacturing and retail trade (NAICS 44) in the mature cluster, and agriculture in the growth sector.

The industries found to be in decline are information, real estate, warehousing, and finance and insurance.

² 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.

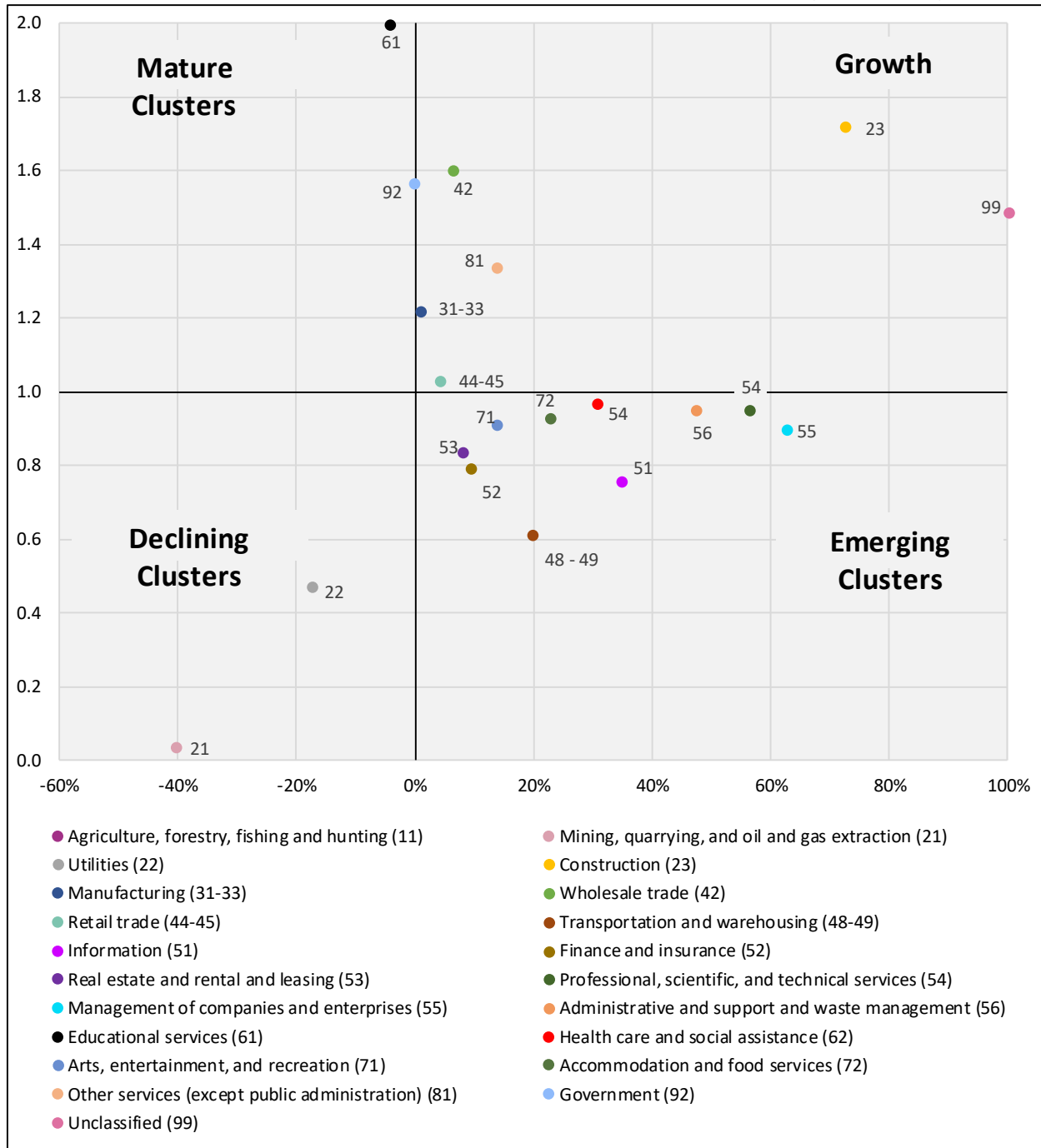
FIGURE 4.8: LQ AND EMPLOYMENT GROWTH RELATIONSHIP, CITY OF MOLALLA (2013 – 2022) *



*Note: NAICS 11 and 32 had an LQ of 28.47 and 2.55 respectively, while NAICS 31 and 55 had a growth rate of 290%, and 1800% from '17 – '22
 Source: Oregon Employment Department, Bureau of Labor Statistics, JOHNSON ECONOMICS

Figure 4.9 below depicts the location quotient analysis done for Clackamas County during the 2013 – 2022 period. Similar to Molalla, a majority of Clackamas County’s industries fall under the emerging cluster. The industries that are closest to crossing into the “growth” quadrant are the “healthcare & social assistance”, “professional, scientific, & technical services”, and “administrative & waste services” industries. The county’s strongest industries in the last decade include construction, wholesale trade, and educational services. Only two of Clackamas County’s industries fall under the declining clusters, these being the mining and utilities industries.

FIGURE 4.9: LQ AND EMPLOYMENT GROWTH RELATIONSHIP, CLACKAMAS COUNTY (2013 – 2022) *



* NAICS 61 had an LQ of 3.23, while NAICS 99 had a growth rate of 1421% in 2022

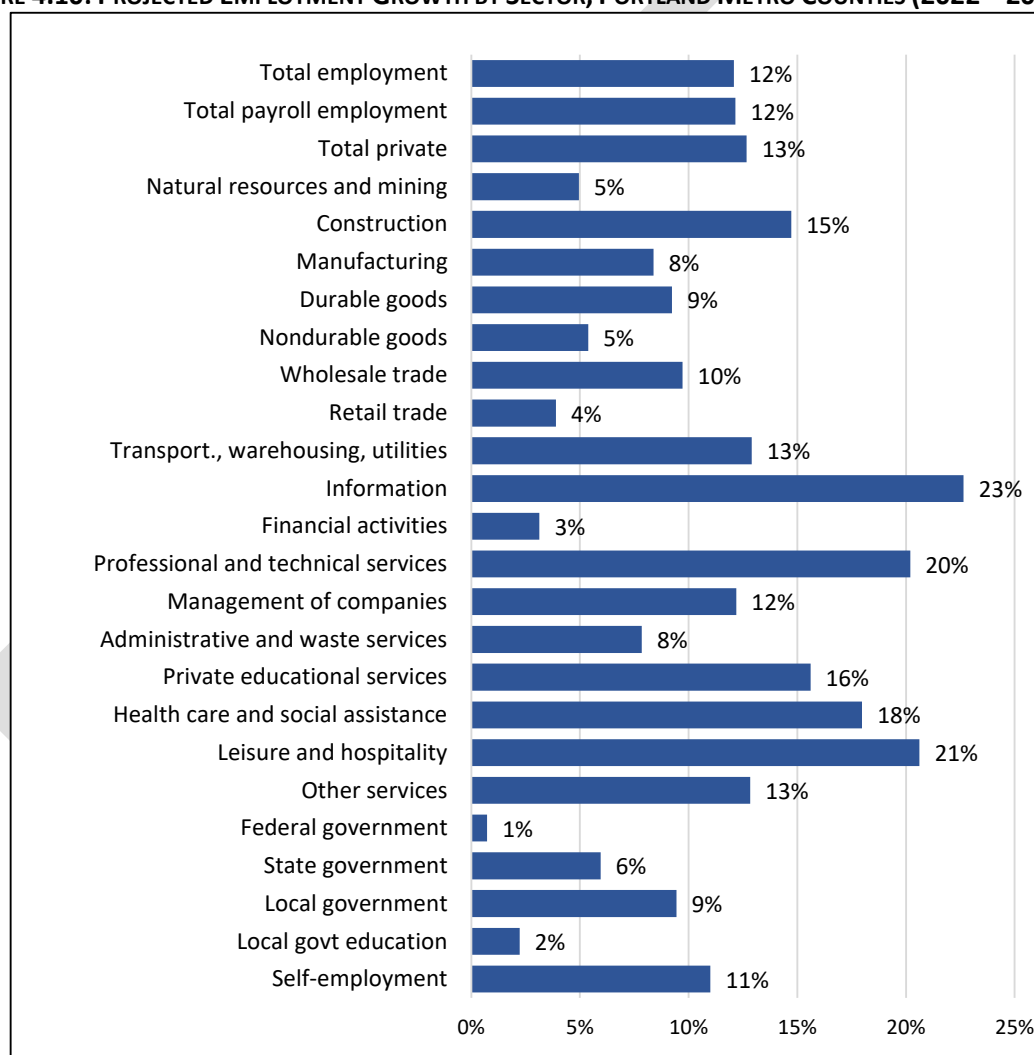
Source: 2013-2022 QCEW Data, Bureau of Labor Statistics, JOHNSON ECONOMICS

PROJECTED EMPLOYMENT GROWTH (OED)

The State of Oregon produces employment forecasts by sector at the broader regional level, which groups Clackamas, Multnomah, and Washington Counties together into one Portland Tri-County region. The most recent forecast anticipates a gain of 127,500 jobs from 2022 through 2032, reflecting growth of 12%, or an average annual rate of about 1.1% during the period. This region has historically seen strong growth, and recovery from the COVID pandemic has been promising.

In this region, the industries with the fastest growth rates are projected to be information, leisure and hospitality (tourism related), professional services, and health care. Furthermore, none of the industries are projected to experience decline in the coming years.

FIGURE 4.10: PROJECTED EMPLOYMENT GROWTH BY SECTOR, PORTLAND METRO COUNTIES (2022 – 2032)



SOURCE: Oregon Employment Department, Workforce and Economic Research Division

V. MOLALLA TARGET INDUSTRIES ANALYSIS (PRELIMINARY)

The preceding analysis provides a basis for narrowing of target industries for the City of Molalla. These indicators point to sectors of past and potential growth, as well as locally expressed economic development vision for the community. The following is a summary of targeted sectors and indicators for Molalla, and the broader region.

Molalla Targets and Indicators

CITY OF MOLALLA Industry Clusters Analysis (2020)	CITY OF MOLALLA Current Largest Employers
Manufacturing	Agriculture/Forestry/Outdoors
Agriculture/Forestry/Outdoors	Retail Trade
Education	Tourism
Health Care	Health Care
Retail and Wholesale Trade	Manufacturing
Tourism-Related (Dining, Lodging, Recreation)	Education
Construction	Construction

STRONG LOCATION QUOTIENT	STRONG SHIFT SHARE INDICATOR
Agriculture/Forestry/Outdoors	Agriculture/Forestry/Outdoors
Education	Construction
Wood Manufacturing	Retail and Wholesale Trade
Retail Trade	Accommodation and Food Service
Accommodation and Food Services	
Transportation	

Regional and Statewide Targets

BUSINESS OREGON - Statewide Targets	SEDCOR - Areas of Focus
Outdoor Gear and Apparel	NW Agriculture Innovation Hub
Forestry & Wood Products	STEM Workforce in Ag and Food Ind.
Advanced Manufacturing	Regional Recruitment
Business Services	
Food & Beverage	
Bioscience	
Metals & Machinery	
High Technology	

These broader analyses arrived at similar conclusions of the advantageous industries for Molalla and the central Clackamas County region in general, including wood product, food product and other manufacturing, and support industries including health care, education, and construction. In preliminary discussions, the community has focused on the desire for a greater diversity of shopping and dining options, and a greater tourism-related industry including lodging and recreation amenities, and agri-tourism.

VI. FORECAST OF EMPLOYMENT AND LAND NEED

CITY OF MOLALLA 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 6.1: UPDATE TO BASELINE YEAR AND CONVERSION OF COVERED TO TOTAL EMPLOYMENT



The first analytical step of the analysis is to update covered employment to the 2024 base year. The Quarterly Census of Employment and Wages (QCEW) data was used to determine the City of Molalla’s covered employment by industry through 2022, the latest year available. To update these estimates, we use observed industry specific growth rates for Clackamas County between 2022 and 2023.

The second step in the analysis is to convert “covered”³ employment to “total” employment. Covered employment only accounts for a share of overall employment in the economy. Specifically, it does not consider sole proprietors or commissioned workers. Covered employment was converted to total employment based on observed ratios at

³ The Department of Labor’s Quarterly Census of Employment and Wages (QCEW) tracks employment data through state employment departments. Employment in the QCEW survey is limited to firms with employees that are “covered” by unemployment insurance.

the national level derived from the Bureau of Economic Analysis from 2014 through 2022. The adjusted 2024 total employment base for the city of Molalla is nearly 3,800 jobs.

FIGURE 6.2: UPDATE TO 2024 BASELINE AND CONVERSION OF COVERED TO TOTAL EMPLOYMENT, CITY OF MOLALLA

Major Industry Sector	QCEW Employment			Total Emp. Conversion ²	2024 Estimate
	2022 Employment	'22-'24 County Δ ¹	2024 Estimate		
Agriculture, forestry, outdoor	726	0.0%	726	75%	968
Construction	127	0.7%	128	81%	157
Manufacturing	269	-0.6%	267	96%	280
Wholesale Trade	137	1.9%	140	88%	159
Retail Trade	432	3.3%	446	82%	547
Transport, Warehousing, Utilities	98	-2.1%	96	75%	129
Information	27	3.8%	28	73%	38
Finance & Insurance	21	-7.0%	20	89%	22
Real Estate	15	-5.0%	14	74%	19
Professional & Technical Services	47	0.8%	47	84%	56
Administration Services	54	0.8%	54	76%	71
Education	205	6.5%	218	79%	277
Health Care/Social Assistance	285	6.5%	304	93%	327
Leisure & Hospitality	361	1.8%	367	83%	441
Other Services	153	0.0%	153	75%	205
Government	93	0.0%	93	100%	93
TOTAL	3,050	1.7%	3,102	82%	3,791

1/Growth rate calculated using CES data for Clackamas County

2/ Bureau of Economic Analysis (2022 County Averages)

SOURCE: Oregon Employment Department, Bureau of Economic Analysis, Johnson Economics

SCENARIO 1: “SAFE HARBOR” FORECAST (EMPLOYMENT GROWTH)

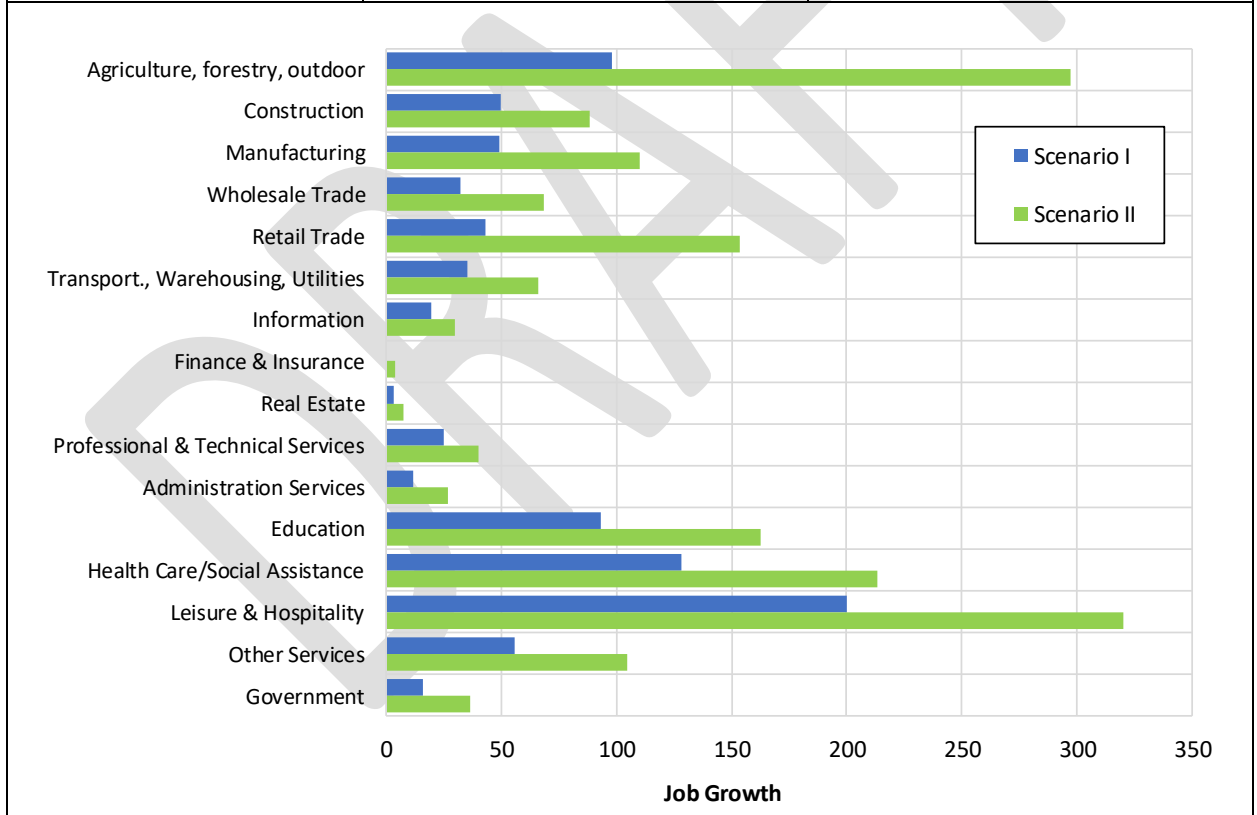
The Goal 9 statute does not have a required method for employment forecasting. However, OAR 660-024-0040(9)(a) outlines several safe harbor methods, which are intended to provide jurisdictions a methodological approach that will not be challenged. The first scenario approach for the City of Molalla is based on 660-024-0040(9)(a)(A), which allows reliance on the most recent regional forecast published by the Oregon Employment Department (see Figure 4.10). This method applies industry specific growth rates for the Tri-County Metro Region (Clackamas, Multnomah, & Washington counties) to the City of Molalla’s 2024 base employment. This method results in an average annual growth rate of 1.0%, with a total growth of 860 jobs over the forecast period.

SCENARIO 2: “SAFE HARBOR” FORECAST (POPULATION GROWTH)

The second scenario approach for the City of Molalla is based on 660-024-0040(9)(a)(B), which allows using the most recently forecasted population growth rate for the City from the PSU Population Research Center (adopted 2020). The employment growth rate may be assumed to match the population growth rate. This method results in an average annual growth rate of 1.9%, with a total growth of 1,730 jobs over the forecast period.

FIGURE 6.3: COMPARISON OF ALTERNATE FORECASTS, CITY OF MOLALLA (2024 - 2044)

Industry	SCENARIO I (Regional Forecast)				SCENARIO II (Population Forecast)			
	2024	2044	Chg.	AAGR	2024	2044	Chg.	AAGR
Agriculture, forestry, outdoor	968	1,066	98	0.5%	968	1,265	297	1.3%
Construction	157	207	50	1.4%	157	246	88	2.3%
Manufacturing	280	329	49	0.8%	280	390	110	1.7%
Wholesale Trade	159	192	32	0.9%	159	228	68	1.8%
Retail Trade	547	590	43	0.4%	547	700	154	1.2%
Transport., Warehousing, Utilities	129	164	35	1.2%	129	195	66	2.1%
Information	38	58	19	2.1%	38	68	30	2.9%
Finance & Insurance	22	22	0	0.0%	22	26	4	0.9%
Real Estate	19	23	3	0.8%	19	27	7	1.6%
Professional & Technical Services	56	82	25	1.9%	56	97	40	2.7%
Administration Services	71	83	12	0.8%	71	98	27	1.6%
Education	277	371	93	1.5%	277	440	163	2.3%
Health Care/Social Assistance	327	456	128	1.7%	327	541	214	2.5%
Leisure & Hospitality	441	641	200	1.9%	441	761	320	2.8%
Other Services	205	261	56	1.2%	205	310	105	2.1%
Government	93	109	16	0.8%	93	130	36	1.7%
TOTAL:	3,791	4,652	861	1.0%	3,791	5,521	1,730	1.9%



Source: Oregon Employment Department, Johnson Economics

SUMMARY OF EMPLOYMENT FORECAST SCENARIOS

The two forecast scenarios in this analysis range from 1.0% to 1.9% average annual growth. Job growth estimates range from 860 to 1,730 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. Any long-term forecast is inherently uncertain and should be updated on a regular basis to reflect more current information. This is particularly

true in a smaller jurisdiction such as Molalla, in which a single large firm’s location and/or operational decision may substantively impact the rate of growth.

FIGURE 6.4: SUMMARY OF PROJECTION SCENARIOS, CITY OF MOLALLA

Industry	Overall Employment					Net Change by Period				Total 24-44
	2024	2029	2034	2039	2044	24-29	29-34	34-39	39-44	
SCENARIO 1 (Regional Trends)										
Agriculture, forestry, outdoor	968	992	1,016	1,041	1,066	24	24	25	25	98
Construction	157	168	180	193	207	11	12	13	14	50
Manufacturing	280	291	303	316	329	12	12	12	13	49
Wholesale Trade	159	167	175	183	192	8	8	8	9	32
Retail Trade	547	557	568	579	590	11	11	11	11	43
Transport., Warehousing, Utilities	129	137	145	154	164	8	9	9	10	35
Information	38	42	47	52	58	4	5	5	6	19
Finance & Insurance	22	22	22	22	22	0	0	0	0	0
Real Estate	19	20	21	22	23	1	1	1	1	3
Professional & Technical Services	56	62	68	74	82	5	6	7	7	25
Administration Services	71	74	77	80	83	3	3	3	3	12
Education	277	298	321	345	371	21	22	24	26	93
Health Care/Social Assistance	327	356	386	420	456	28	31	33	36	128
Leisure & Hospitality	441	484	531	584	641	43	48	52	57	200
Other Services	205	218	232	246	261	13	14	14	15	56
Government	93	97	101	105	109	4	4	4	4	16
TOTAL:	3,791	3,985	4,193	4,415	4,652	194	208	222	237	861
SCENARIO 2 (Modified)										
Agriculture, forestry, outdoor	968	1,035	1,107	1,183	1,265	67	72	77	82	297
Construction	157	176	197	220	246	19	21	23	26	88
Manufacturing	280	304	330	359	390	24	26	29	31	110
Wholesale Trade	159	174	190	208	228	15	16	18	19	68
Retail Trade	547	582	619	658	700	35	37	40	42	154
Transport., Warehousing, Utilities	129	143	158	176	195	14	16	17	19	66
Information	38	44	51	59	68	6	7	8	9	30
Finance & Insurance	22	23	24	25	26	1	1	1	1	4
Real Estate	19	21	23	25	27	2	2	2	2	7
Professional & Technical Services	56	65	74	85	97	8	9	11	12	40
Administration Services	71	77	84	91	98	6	6	7	8	27
Education	277	311	349	392	440	34	38	43	48	163
Health Care/Social Assistance	327	371	421	477	541	44	50	56	64	214
Leisure & Hospitality	441	505	579	664	761	64	74	85	97	320
Other Services	205	228	252	280	310	22	25	27	30	105
Government	93	101	110	119	130	8	9	9	10	36
TOTAL:	3,791	4,159	4,568	5,020	5,521	369	408	452	501	1,730

Source: Oregon Employment Department, Johnson Economics

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

EMPLOYMENT LAND FORECAST

The next analytical step in our analysis is to convert projections of employment into forecasts of land demand over the planning period. The generally accepted methodology for this conversion 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 typology.

The next step converts employment into space using estimates of the typical square footage exhibited within each typology. Adjusting for market average vacancy we arrive at an estimate of total space demand for each building type.

Finally, we can consider 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 – SCENARIO 2

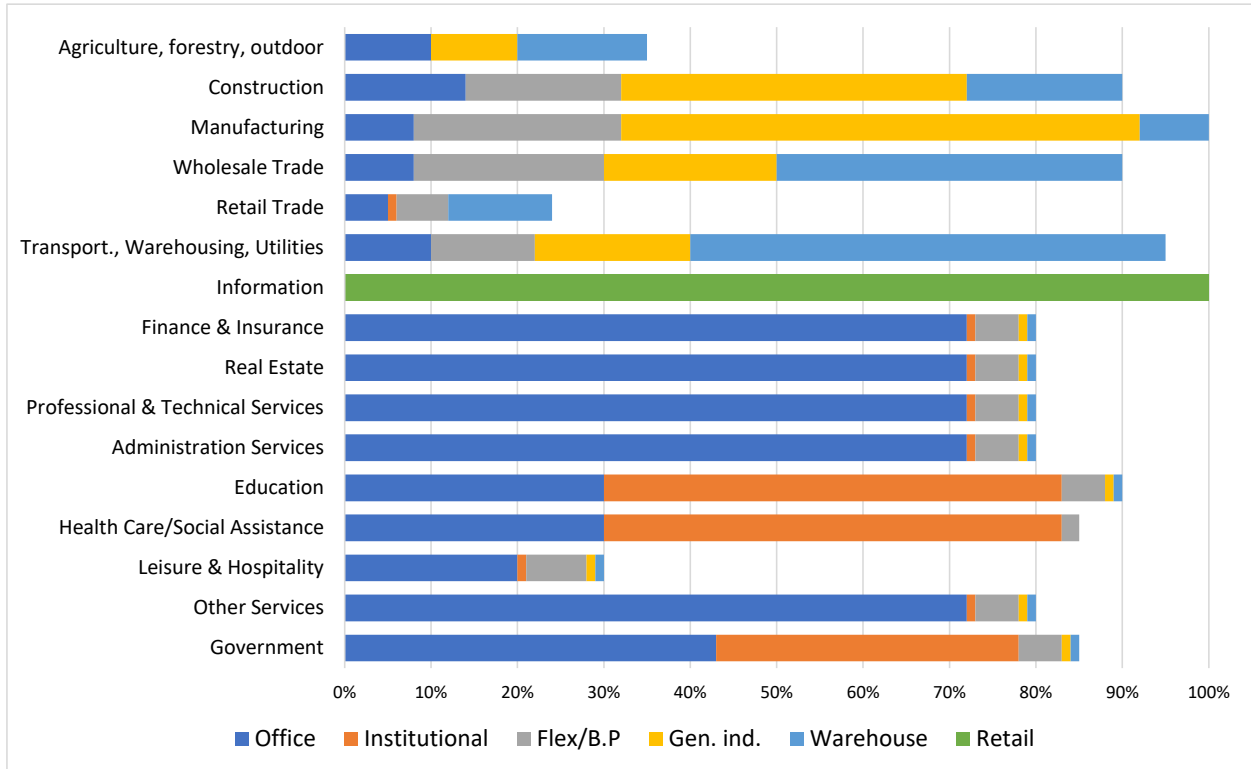
In this analytical step we allocate employment growth to the standard building typologies. The building typology matrix represents the share of sectoral employment that is located across various building types. (Note that only a fraction of employment in the agricultural sector is assumed to need urban 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 6.5: DISTRIBUTION OF EMPLOYMENT BY SPACE TYPE, CITY OF MOLALLA

Industry Sector	20-year Job Forecast		BUILDING TYPE MATRIX					
	Number	AAGR	Office	Institutional	Flex/B.P	Gen. ind.	Warehouse	Retail
Agriculture, forestry, outdoor	297	1.3%	10%	0%	0%	0%	15%	0%
Construction	88	2.3%	14%	0%	18%	40%	18%	10%
Manufacturing	110	1.7%	8%	0%	24%	60%	8%	0%
Wholesale Trade	68	1.8%	8%	0%	22%	20%	40%	10%
Retail Trade	154	1.2%	5%	1%	6%	0%	12%	76%
Transport., Warehousing, Utilities	66	2.1%	10%	0%	12%	18%	55%	5%
Information	30	2.9%	80%	20%	0%	0%	0%	0%
Finance & Insurance	4	0.9%	72%	1%	5%	1%	1%	20%
Real Estate	7	1.6%	72%	1%	5%	1%	1%	20%
Professional & Technical Services	40	2.7%	72%	1%	5%	1%	1%	20%
Administration Services	27	1.6%	72%	1%	5%	1%	1%	20%
Education	163	2.3%	30%	53%	5%	1%	1%	10%
Health Care/Social Assistance	214	2.5%	30%	53%	2%	0%	0%	15%
Leisure & Hospitality	320	2.8%	20%	1%	7%	1%	1%	70%
Other Services	105	2.1%	72%	1%	5%	1%	1%	20%
Government	36	1.7%	43%	35%	5%	1%	1%	15%
TOTAL	1,730	1.9%	24%	13%	7%	8%	9%	26%

Source: Johnson Economics

FIGURE 6.6: ASSUMED DISTRIBUTION OF SPACE BY TYPE AND INDUSTRY SECTOR, CITY OF MOLALLA



Source: Johnson Economics

FIGURE 6.7: NET GROWTH IN EMPLOYMENT BY BUILDING TYPE, CITY OF MOLALLA (SCENARIO 2) 2024-2044

Industry Sector	NET CHANGE IN EMPLOYMENT BY BUILDING TYPE - 2022-2042						Total
	Office	Institutional	Flex/B.P	Gen. Ind.	Warehouse	Retail	
Agriculture, forestry, outdoor	30	0	0	0	45	0	74
Construction	12	0	16	35	16	9	88
Manufacturing	9	0	26	66	9	0	110
Wholesale Trade	5	0	15	14	27	7	68
Retail Trade	8	2	9	0	18	117	154
Transport, Warehousing, Utilities	7	0	8	12	36	3	66
Information	24	6	0	0	0	0	30
Finance & Insurance	3	0	0	0	0	1	4
Real Estate	5	0	0	0	0	1	7
Professional & Technical Services	29	0	2	0	0	8	40
Administration Services	20	0	1	0	0	5	27
Education	49	86	8	2	2	16	163
Health Care/Social Assistance	64	113	4	0	0	32	214
Leisure & Hospitality	64	3	22	3	3	224	320
Other Services	75	1	5	1	1	21	105
Government	16	13	2	0	0	5	36
TOTAL	419	225	120	134	158	450	1,507

Source: Johnson Economics

Under the employment forecast scenario, employment housed in retail space accounts for the greatest share of growth, followed by employment housed in office space. The combined employment forecast in commercially zoned

space (~1,100 jobs) is somewhat greater than that forecast for industrially zoned space (~415 jobs). Note that the 1,507 total jobs shown here is less than the total employment in the adjusted forecast (1,730 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 analysis 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), based upon the observed FAR in existing Molalla commercial and industrial properties. The combined space and FAR assumptions further provide estimates indicated of job densities, determined on a per net-developable acre basis.

FIGURE 6.8: NET ACRES REQUIRED BY BUILDING TYPOLOGY, CITY OF MOLALLA (SCENARIO 2 FORECAST) – 20-YEAR

	DEMAND BY GENERAL USE TYPOLOGY, 2020-2040						Total
	Office	Institutional	Flex/B.P	Gen. Ind.	Warehouse	Retail	
Employment Growth	419	225	120	134	158	450	1,507
Avg. SF Per Employee	350	600	990	600	1,850	500	663
Demand for Space (SF)	146,800	134,800	119,200	80,500	293,100	225,100	999,500
Floor Area Ratio (FAR)	0.25	0.30	0.25	0.25	0.20	0.25	0.24
Market Vacancy	10.0%	0.0%	10.0%	5.0%	5.0%	10.0%	6.8%
Implied Density (Jobs/Acre)	28.0	21.8	9.9	17.2	4.5	19.6	14.5
Net Acres Required	15.0	10.3	12.2	7.8	35.4	23.0	103.6

Source: Johnson Economics

Commercial office and retail densities are 28 and 20 jobs per acre, respectively. Industrial uses range from 17 for general industrial to less than 5 jobs per acre for warehouse/distribution. The overall weighted employment density is 15 jobs per acre, with the projected 1,730-job expansion in the local employment base through 2044 requiring an estimated 104 net acres of employment land. An estimated 53% of this forecasted need is industrial land, and 47% commercial land. A major reason for this is the lower average employment density typically seen in industrial land use.

Employment Buildable Lands Inventory (DRAFT)

City of Molalla Economic Opportunities Analysis

Date July 9, 2024
To City of Molalla
From Andrew Parish and Sun-Gyo Lee, MIG
CC Brendan Buckley, Johnson Economics

INTRODUCTION

This memorandum describes the methodology and DRAFT results of the Buildable Lands Inventory (BLI) for the City of Molalla’s Economic Opportunities Analysis (EOA). This analysis supports the broader EOA by identifying the amount and types of land available for employment uses in the City’s Urban Growth Boundary (UGB). The findings of the BLI will be compared to the forecast of needed employment land in order to quantify the surplus or deficiency of land in any or all of the City’s commercial and industrial land categories.

REGULATORY BASIS

This BLI is consistent with the following requirements of statewide planning Goal 9 and the Goal 9 administrative rule (OAR 660-009) as they pertain to BLIs. The BLI supports an Economic Opportunities Analysis that is currently underway.

1. **Economic Opportunities Analysis (OAR 660-009-0015).** The Economic Opportunities Analysis (EOA) requires communities to:
 - Identify the major categories of industrial or other employment uses that could reasonably be expected to locate or expand in the planning area based on information about national, state, regional, county or local trends;
 - Identify the number of sites by type reasonably expected to be needed to accommodate projected employment growth based on site characteristics typical of expected uses;
 - Include an inventory of vacant and developed lands within the planning area designated for industrial or other employment use; and

- Estimate the types and amounts of industrial and other employment uses likely to occur in the planning area.
2. **Industrial and commercial development policies (OAR 660-009-0020).** Cities with a population over 2,500 are required to develop commercial and industrial development policies based on the EOA. Local comprehensive plans must state the overall objectives for economic development in the planning area and identify categories or particular types of industrial and other employment uses desired by the community. Local comprehensive plans must also include policies that commit the city or county to designate an adequate number of employment sites of suitable sizes, types and locations. The plan must also include policies to provide necessary public facilities and transportation facilities for the planning area.

METHODOLOGY

Consistent with OAR 660-009-0015, the BLI is conducted in several steps as follows.

- **Step 1: Identify Land Type** – This step identifies all land within the UGB as either “Residential,” “Employment,” or “Other,” based on zoning and additional characteristics. Employment lands are the focus of this BLI.
- **Step 2: Identify and Calculate Constraints** – This step identifies development constraints and removes constrained land from the inventory to measure the amount of developable land more accurately within the UGB.
- **Step 3: Classify Land by Development Status** – This step classifies land into categories of “Vacant,” “Partially Vacant,” “Developed,” and “Committed,” based on a series of filters using available data.
- **Step 4: Inventory Results** – This step reports the results of the analysis in various ways, and accounts for land needed for right-of-way and other public uses to arrive at total developable net acreage within the UGB.

The remainder of this memorandum addresses each of the above steps in turn.

Input Data

The following data sources were utilized in this analysis.

- City limits and Urban Growth Boundary, provided by City of Molalla
- Zoning districts, provided by City of Molalla
- Tax lot data, provided by City of Molalla
- Riparian Corridor, provided by City of Molalla
- Local Wetland Inventory, provided by City of Molalla

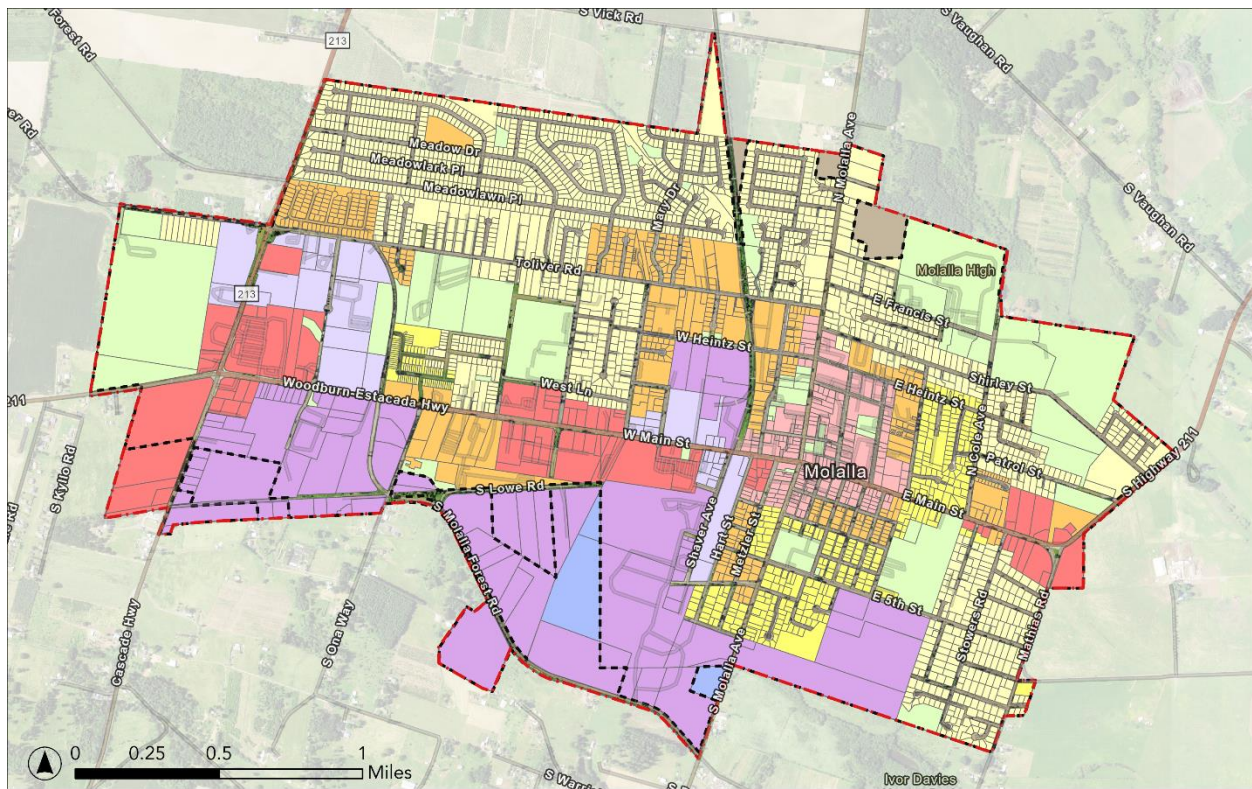
- Aerial Imagery, provided by Oregon Spatial Data Library

Step 1: Identify Land Type

Land in the City of Molalla is categorized as Residential, Employment, or Other based on zoning designation and other factors. Zoning designations in the City of Molalla are shown in Figure 1. Table 1 describes the zoning designations that make up each land category. Additional reclassifications may be made based on site ownership and other characteristics.

Figure 2 shows the classification of land within the City of Molalla.

Figure 1: Molalla Zoning Designations



City of Molalla
Economic Opportunities Analysis
Employment Buildable Lands Inventory

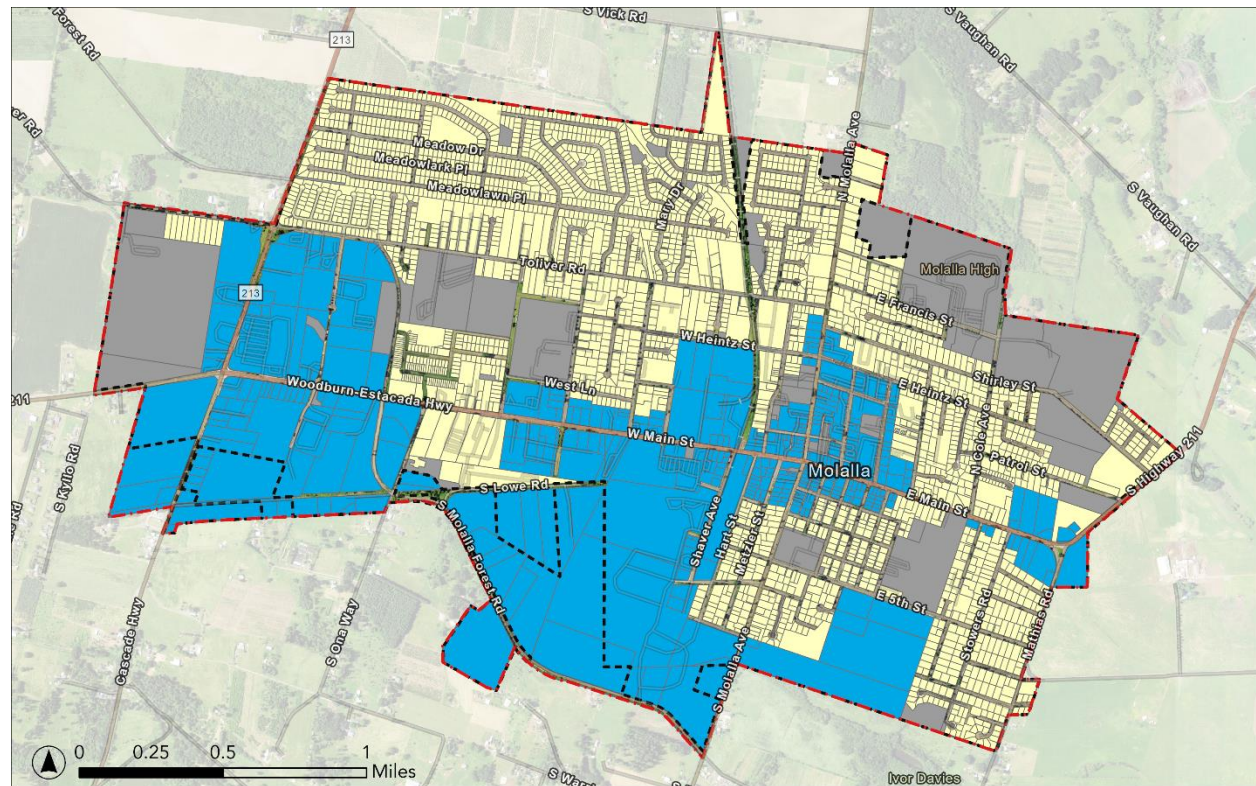
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|---|--|--|
| Single Family Residential (R-1) | Central Commercial (C-2) | Public and Semi Public (PSP) |
| Two Family Residential (R-2) | M1 | Exclusive Farm Use (EFU) |
| Multi-Family Residential (R-3) | Heavy Industrial (M-2) | City Boundary |
| General Commercial (C-1) | Rural Industrial (RI) | UGB Boundary |

Table 1: Land Classifications and Zoning Designations

Category	Zones
Residential	Single Family Residential, Two Family Residential, Multi-Family Residential
Employment	General Commercial, Central Commercial, Light Industrial, Heavy Industrial, Rural Industrial (Clackamas County)
Other	Public and Semi Public, Exclusive Farm Use (Clackamas County)

Figure 2: Land Classification in the City of Molalla



City of Molalla
Economic Opportunities Analysis
Employment Buildable Lands Inventory

Legend

- Residential
- Employment
- Other
- City Boundary
- UGB Boundary

Table 2 summarizes the number of tax lots and gross acreage associated with the three land types. Roughly 41% of land in the UGB is classified as employment land.



Table 2: Land Type

Category	Number of Tax lots	Gross Acres ¹	Percent of Area
Employment	413	629.2	41.1%
Residential	2,734	633.1	41.4%
Other	61	268.3	17.5%
Total	3,208	1,530.6	100.0%

¹ Gross acreage includes a limited number of tax lots that are partially located inside the Molalla UGB.

Step 2: Calculate Constraints

OAR 660-009-005 states:

“Development Constraints” means 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 archeological resources, infrastructure deficiencies, parcel fragmentation, or natural hazard areas.

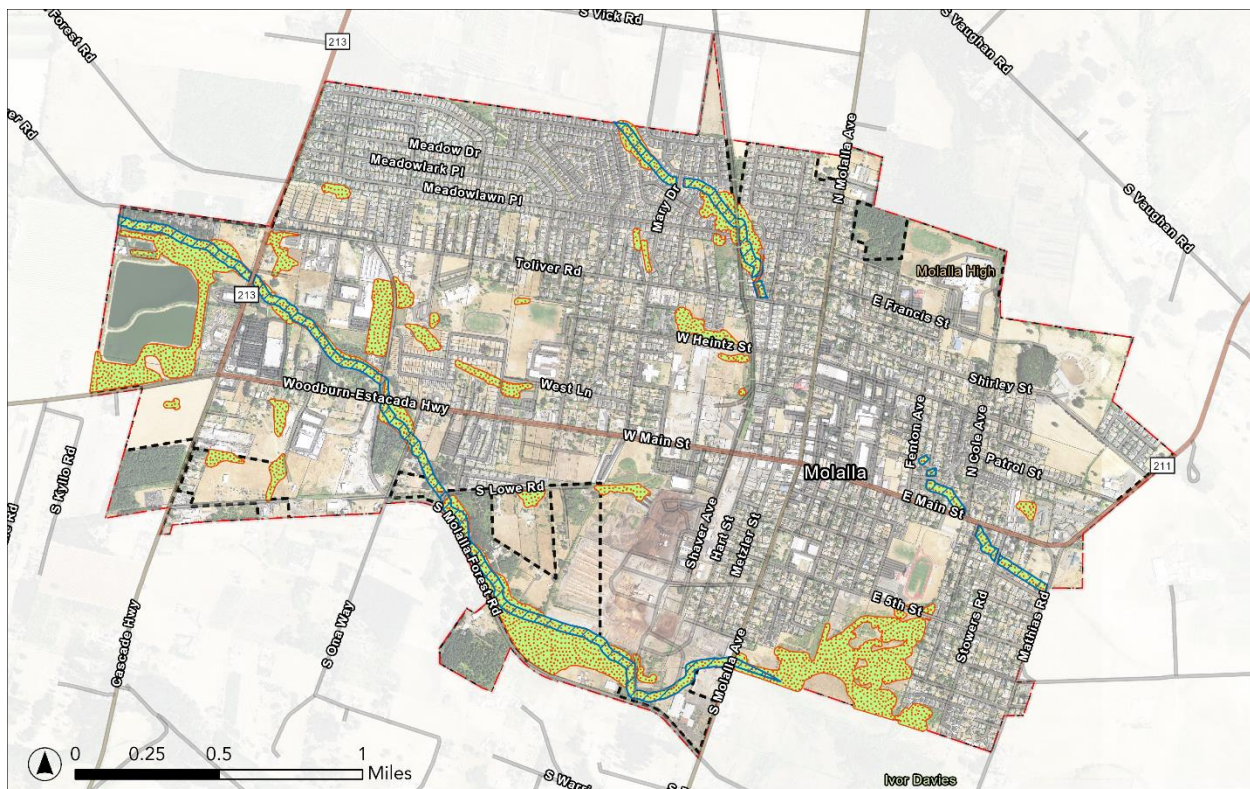
The constraints used for this analysis include:

- Local Wetland Inventory
- Riparian Corridor

The portions of a site that are affected by one or more of these constraints are removed from the site area and are not considered buildable for the purposes of the inventory.

Figure shows the location of these constraints.

Figure 3. Molalla Development Constraints



City of Molalla
Economic Opportunities Analysis
Employment Buildable Lands Inventory

Legend

- Riparian Corridor
- Wetlands
- City Boundary
- UGB Boundary

Table 3 provides a summary of the overall amount of constrained areas present within the UGB. Approximately 91 acres of employment land is constrained by wetlands or Riparian corridor.

Table 3: Development Constraints

Unit: acre

Category	Constrained	Unconstrained	Total
Employment	91.4	537.8	629.2
Residential	26.4	606.7	633.1
Other	37.7	230.6	268.3
Total	155.5	1,375.1	1,530.6

Step 3: Classify Employment Land by Development Status

Employment land within the study area was classified by development status, as follows:

- **“Vacant”** land meets one or more of the following criteria:
 - Equal to or larger than ½ acre and not currently containing permanent improvements.²
 - Equal to or larger than 5 acres where less than ½ acre is occupied by permanent buildings or improvements.³
 - Improvement value is less than \$5,000 or less than 5% of the property’s land value.⁴
- **“Partially Vacant”** land has an improvement value of between 5% and 40% of the land value, or is greater than one acre in size with at least ½ acre not improved (based on aerial photos). Unless aerial photos or other information indicate otherwise, this inventory assumes that 50% of unconstrained land is vacant based on state safe harbor provisions.⁵
- **“Developed”** land has an improvement value greater than 40% of the land value and/or does not meet the definition of vacant or partially vacant.⁶
- **“Committed”** land with special uses such as religious facility, charitable property, veteran service facility, public property, etc. is considered not developable.

Table 4 presents a summary of the land development status organized by zoning inside City limits and by general commercial/industrial designation outside of City limits. Development status was assigned based on available information and City of Molalla input.

Table 4: Unconstrained Employment Land Acreage by Development Status

Zone	Vacant Acres	Partially Vacant Acres	Developed Acres	Committed Acres	Total
General Commercial (C-1)	6.6	1.4	37.9	5.9	51.9
Central Commercial (C-2)	47.3	35.4	38.3	14.4	135.3
Commercial Subtotal	53.9	36.8	76.2	20.3	187.3
Light Industrial (M-1)	23.2	21.5	27.0	0.0	71.6
Heavy Industrial (M-2)	104.2	58.7	82.8	13.1	258.8
Rural Industrial (RI)	3.3	0.0	16.9	0.0	20.2
Industrial Subtotal	130.7	80.1	126.7	13.1	350.6
Total	184.6	117.0	202.9	33.4	537.8

² Safe harbor pursuant to OAR 660-024-0050(3)(a)

³ Safe harbor pursuant to OAR 660-024-0050(3)(b)

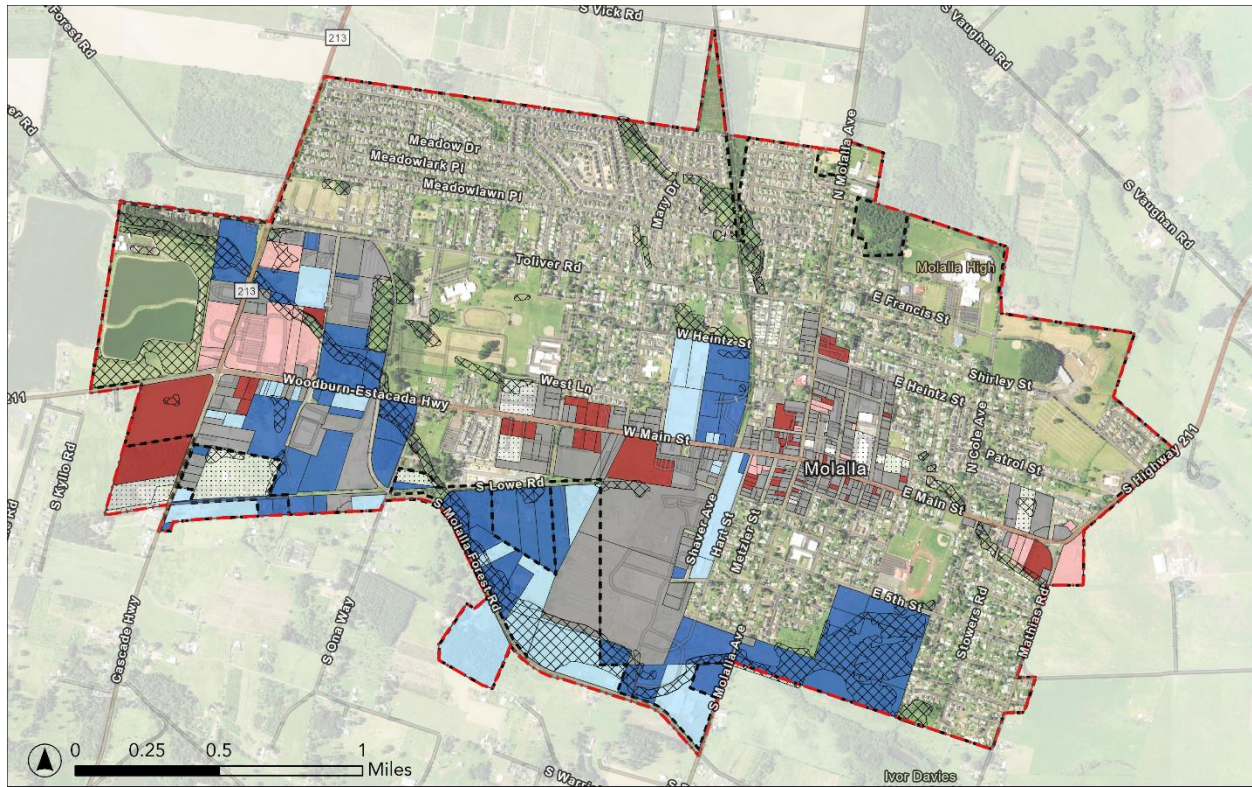
⁴ Safe harbor pursuant to OAR 660-038-0120(2)(a)

⁵ Safe harbor pursuant to OAR 660-038-0120(2)(b)

⁶ Safe harbor pursuant to OAR 660-038-0120(2)(c)

Figure illustrates the development status of employment land types within the City’s UGB.

Figure 4: Employment Land by Development Status



City of Molalla
Economic Opportunities Analysis
Employment Buildable Lands Inventory

Legend

Commercial	Industrial	Constraints
Vacant	Vacant	City Boundary
Partially Vacant	Partially Vacant	UGB Boundary
Developed	Developed	
Committed	Committed	

Step 4: Inventory Results

A portion of unconstrained land is assumed to be used for infrastructure improvements, such as rights-of-way and stormwater treatment facilities, or otherwise unavailable for future employment uses. This analysis uses the following takeouts:

- 50% of all employment land identified as partially vacant.
- 15% of vacant industrial employment land (Light Industrial, Heavy Industrial, Rural Industrial zones).
- 20% of vacant commercial employment land (General Commercial, Central Commercial).

The 50% deduction is based on safe harbor rules in OAR 660-038-0120(2)(b), which assumes half the site is available to support additional economic development. The 15% and 20% deductions for vacant industrial and commercial employment lands are to account for potential infrastructure improvements on vacant land. Typically, infrastructure improvements include right-of-way dedications for street improvements.⁷

Table 5 summarizes net developable acreage by development type and zoning designation.

Table 6 classifies the developable lands by size.

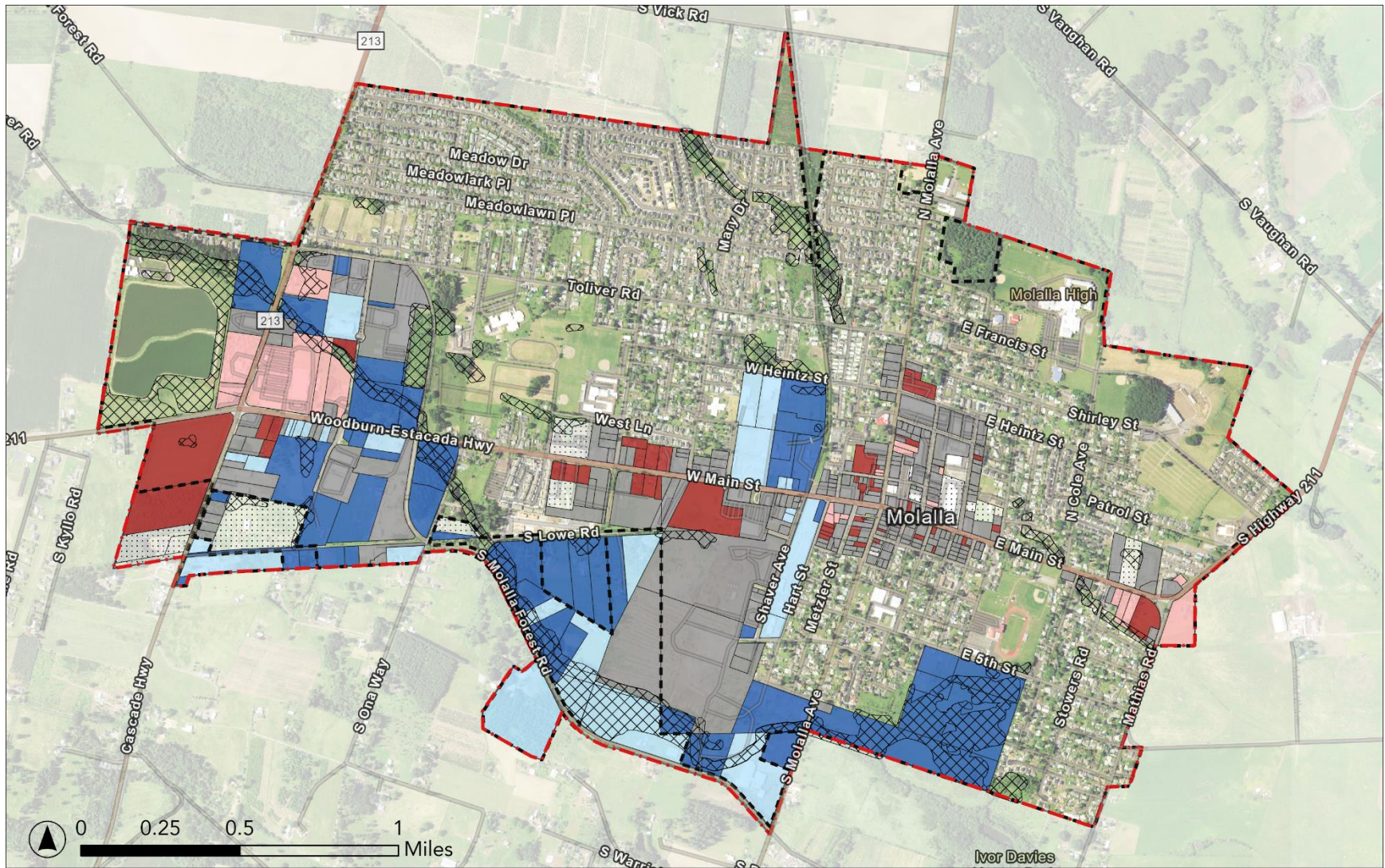
Table 5: Net Developable Acres of Employment Land by Zone

	Net Developable Acres on Vacant Parcels	Net Developable Acres on Partially Vacant Parcels	Total Net Developable Acres
General Commercial (C-1)	5.3	0.7	6.0
Central Commercial (C-2)	37.8	17.7	55.5
Commercial Subtotal	43.1	18.4	61.5
Light Industrial (M-1)	19.7	10.7	30.4
Heavy Industrial (M-2)	88.6	29.3	117.9
Rural Industrial (RI)	2.8	-	2.8
Industrial Subtotal	111.1	40.1	151.1
Total	154.2	58.5	212.7

⁷ Note, OAR 660-024-0040(10) allows a safe harbor deduction of 25% for a residential buildable land inventory to account for streets and roads, parks, and school facilities. There is no equivalent rule in the OAR for an employment buildable land inventory. A lesser set-aside is used for this employment BLI due to the lower intersection density typical of employment land, as seen in many communities throughout the state.

Table 6. Net Developable Acres of Employment Land by Zone Category and Lot Size

	Number of lots	Net Acres	Percent of Area
Commercial			
0 – 5 acres	70	28.3	13.3%
5 – 10 acres	3	20.8	9.8%
>10 acres	1	12.5	5.9%
Commercial Subtotal	74	61.6	28.9%
Industrial			
0 – 5 acres	74	117.1	55.0%
5 – 10 acres	5	34.1	16.0%
>10 acres	0	0	0.0%
Industrial Subtotal	79	151.2	71.1%
Total	153	212.8	100.0%



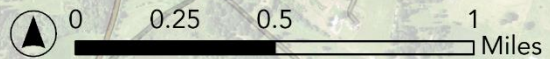
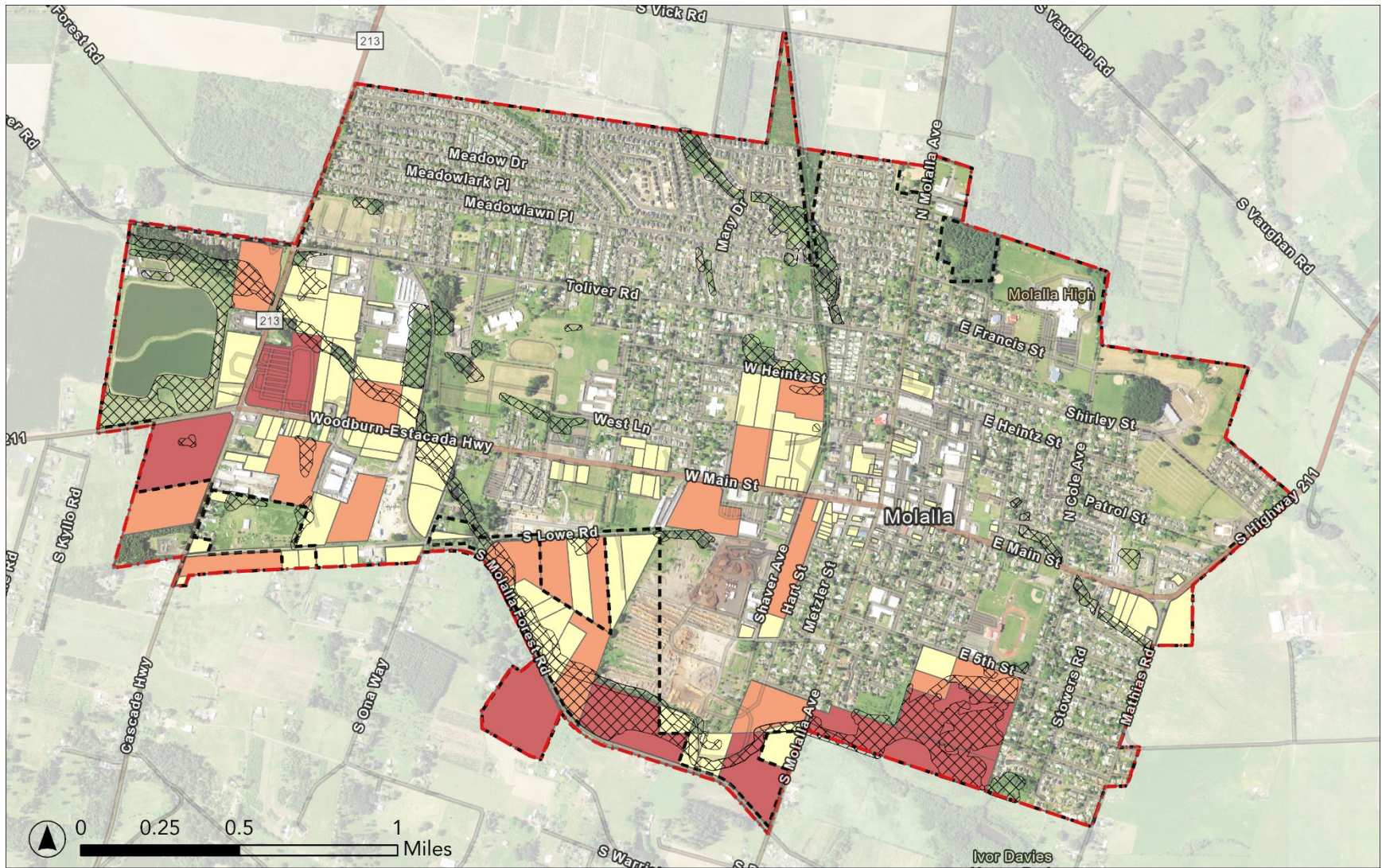
City of Molalla
 Economic Opportunities Analysis
 Employment Buildable Lands Inventory

Legend

- Commercial
- Vacant
- Partially Vacant
- Developed
- Committed

- Industrial
- Vacant
- Partially Vacant
- Developed
- Committed

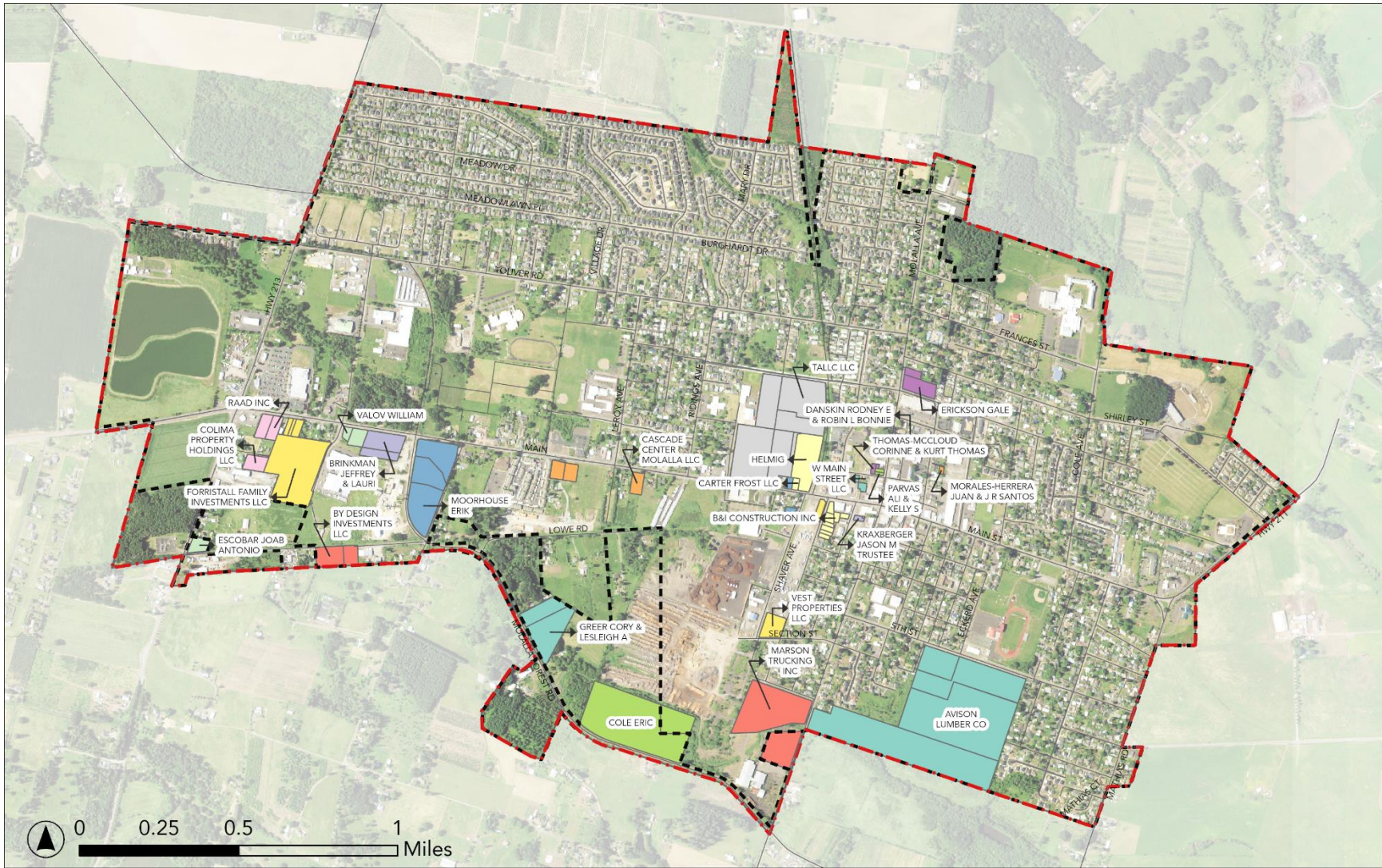
- Constraints
- City Boundary
- UGB Boundary



City of Molalla
 Economic Opportunities Analysis
 Employment Buildable Lands Inventory

Legend

- Gross Acres
 - 0 - 5 acres
 - 5 - 10 acres
 - > 10 acres
- Constraints
- City Boundary
- UGB Boundary



City of Molalla
 Economic Opportunities Analysis
 Employment Buildable Lands Inventory

Parcels under the same ownership

Owner	Gross Acres	Parcel #	Owner	Gross Acres	Parcel #	Owner	Gross Acres	Parcel #
Avison Lumber Co	47.58	4	Escobar Joab Antonio	0.9	2	Tallc Llc	21.63	6
B&I Construction Inc	1.48	9	Forristall Family Investments Llc	10.73	4	Thomas-Mccloud Corinne & Kurt Thomas	0.19	2
Brinkman Jeffrey & Lauri	3.13	2	Greer Cory & Lesleigh A	6.09	2	Valov William	1.17	2
By Design Investments Llc	2.62	2	Helmig	4.2	2	Vest Properties Llc	1.93	2
Carter Frost Llc	0.73	3	Kraxberger Jason M Trustee	0.16	2	W Main Street Llc	0.31	2
Cascade Center Molalla Llc	2.28	3	Marson Trucking Inc	11.75	2			
Cole Eric	16.92	2	Moorhouse Erik	9.42	3			
Colima Property Holdings Llc	1.08	2	Morales-Herrera Juan & J R Santos	0.13	2			
Danskin Rodney E & Robin L Bonnie	0.69	2	Parvas Ali & Kelly S	0.18	2			
Erickson Gale	1.91	2	Raad Inc	1.67	2			

Parcels under the same ownership

Owner	Gross Acres	Number of Parcels
Avison Lumber Co	47.58	4
B&I Construction Inc	1.48	9
Brinkman Jeffrey & Lauri	3.13	2
By Design Investments LLC	2.62	2
Carter Frost Llc	0.73	3
Cascade Center Molalla LLC	2.28	3
Cole Eric	16.92	2
Colima Property Holdings LLC	1.08	2
Danskin Rodney E & Robin L Bonnie	0.69	2
Erickson Gale	1.91	2
Escobar Joab Antonio	0.90	2
Forristall Family Investments LLC	10.73	4
Greer Cory & Lesleigh A	6.09	2
Helmig	4.20	2
Kraxberger Jason M Trustee	0.16	2
Marson Trucking Inc	11.75	2
Moorhouse Erik	9.42	3
Morales-Herrera Juan & J R Santos	0.13	2
Parvas Ali & Kelly S	0.18	2
Raad Inc	1.67	2
Tallc LLC	21.63	6
Thomas-Mccloud Corinne & Kurt Thomas	0.19	2
Valov William	1.17	2
Vest Properties Llc	1.93	2
W Main Street Llc	0.31	2