

December 2024

City of St. Helens Economic Opportunities Analysis

Prepared for: City of St. Helens

ECOnorthwest

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Acknowledgments

ECOnorthwest prepared this report with support from the guidance and input of several partners, including members, staff, and leadership of the City of St. Helens. This work was funded by Oregon general fund dollars through the Department of Land Conservation and Development (DLCD). The contents of this report do not necessarily reflect the views or policies of the State of Oregon.

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Executive Summary

The City of St. Helens last updated its Economic Opportunities Analysis (EOA) in 2008. Since then, the local economy has undergone significant changes due to events like the Great Recession and the COVID-19 pandemic. One of the city's most critical opportunities for future economic growth is the ongoing Waterfront Redevelopment Project. This initiative aims to transform key properties, including former industrial sites, into new economic drivers for St. Helens. It offers opportunities for mixed-use development, industrial expansion, and enhanced community access.

This updated EOA aligns with Statewide Planning Goal 9 and the Goal 9 Administrative Rule (OAR 660-009). It provides a forecast for employment growth from 2025 to 2045 and evaluates available commercial and industrial land to accommodate that growth. Additionally, the EOA offers strategic recommendations for leveraging key advantages—such as St. Helens' industrial land supply, access to the Columbia River and deepwater port, and key redevelopment sites—to drive future economic development and resilience.

PURPOSE OF THIS ECONOMIC OPPORTUNITY ANALYSIS

- » Forecast the amount of land needed to accommodate the future employment growth within St. Helens between 2025 and 2045.
- » Evaluate the existing employment land supply within the city to determine if it is adequate to meet that need.
- » Help the City understand its economic opportunities in the context of St. Helens' comparative advantages and disadvantages.
- » Fulfill state planning requirements for a twenty-year supply of employment land.

How much buildable employment land does St. Helens currently have?

St. Helens has 1,391 acres designated for commercial or industrial use within its urban growth boundary (UGB). Of these, approximately 302 acres (22%) are unconstrained and buildable. Of the buildable land, 58 acres (20%) are designated for commercial uses and 243 acres (80%) are set aside for industrial development.

How much growth is St. Helens planning for?

St. Helens' employment base is projected to grow from 7,356 employees in 2025 to 8,777 employees by 2045, an increase of 1,421 jobs over the planning period. Most new employment (85% or 1,211 employees) will require commercial and industrial land.



How much land will be required for employment?

The projected 1,211 new employees will create demand for approximately 29 gross acres of industrial land and 54 gross acres of commercial land during the 2025–2045 period.

Does St. Helens have enough land to accommodate employment growth?

St. Helens has sufficient land within its UGB to accommodate industrial and commercial employment growth. The city is forecasted to have a surplus of 214 gross acres of industrial land and a smaller surplus of 4 gross acres of commercial land. This limited surplus of commercial land suggests that St. Helens may need to take strategic actions to ensure there is adequate commercial land available within the UGB for growth over the next 20 years.

The City will require commercial sites ranging from existing building spaces to parcels between 1 and 5 acres, along with a potential larger site to attract a hotel. Some commercial land may also be used for housing, either in mixed-use developments or as stand-alone affordable housing projects. To meet future needs, the City might consider rezoning select industrial parcels for commercial use.

What are St. Helens growth opportunities?

St. Helens' key competitive advantages include:

- ◆ **Columbia River Access:** The city's location along the Columbia River, with deepwater port access and proximity to downtown, supports maritime industries, tourism, and opportunities for new commercial, industrial, and residential development.
- ◆ **Industrial Land Supply:** St. Helens has a substantial inventory of buildable industrial land and supporting infrastructure, which can accommodate both large and small businesses.
- ◆ **Waterfront Redevelopment:** The Waterfront Redevelopment Project aims to revitalize St. Helens' historic downtown, transforming former industrial sites into new economic hubs and reconnecting the community with its riverfront.
- ◆ **Strategic Location:** St. Helens' location along Highway 30 and near the Portland region facilitates freight movement and workforce attraction. Its proximity to Scappoose's Oregon Manufacturing Innovation Center and Portland Community College offers potential economic benefits from anticipated growth in manufacturing businesses.
- ◆ **Tourism from Spirit of Halloweentown:** The annual Spirit of Halloweentown festival attracts thousands of visitors each October, boosting tourism, supporting local businesses, and enhancing the city's brand recognition as a creative and community-oriented destination.



These factors position St. Helens as an appealing location for residents and businesses. The city has growth potential in industries such as manufacturing, skilled trades, healthcare, tourism, and services for residents (e.g., retail, restaurants, childcare).

What are the key recommendations?

Based on the analysis and conclusions in this report, EConorthwest recommends that the City of St. Helens **update the economic section of its Comprehensive Plan**. This section has not undergone a comprehensive update in over a decade. The new information provided in the EOA offers an updated fact base to guide future decision-making. EConorthwest also recommends that the City **develop an action plan to implement its economic development goals and policies**.

Draft economic development goals, policies, and corresponding actions to support implementation are provided below for the City's consideration.

GOAL A: ENCOURAGE THE GROWTH OF A HEALTHY, STABLE, AND DIVERSIFIED ECONOMIC BASE FOR COMMERCIAL AND INDUSTRIAL BUSINESSES

Policies

- ◆ Support the growth, development, and retention of a diverse mix of industries that complement existing strengths and assets in the community, reducing reliance on any single sector.
- ◆ Attract businesses offering jobs that pay higher than Columbia County's average wage, to provide opportunities for people to live and work in St. Helens, focusing on industries such as manufacturing, healthcare, and high-tech.
- ◆ Coordinate economic development efforts with other jurisdictions and agencies such as the St. Helens Main Street Alliance, Columbia Economic Team, Small Business Development Center, and Port of Columbia County to identify and support the expansion of existing industries and attraction of new industries to the community.
- ◆ Foster entrepreneurship, new business creation, and expansion of existing businesses through strengthened partnerships and coordinated economic development efforts.
- ◆ Enhance the diversity of goods and services available to residents by attracting and supporting a wide range of enterprises, including but not limited to remote workers.
- ◆ Prioritize the attraction and growth of businesses that use less energy, focusing on sectors that promote energy efficiency and sustainability.
- ◆ Ensure adequate economic development staffing to implement economic development policy.
- ◆ Ensure adequate development review staffing such as those in Planning, Building and Engineering divisions to maximize responsiveness and optimum customer service for development proposals.



Actions

- ◆ Hire a community development specialist to improve coordination with organizations and businesses to make St. Helens a more business-friendly city. This role would supplement current staff by handling tasks they lack the time or expertise to advance. The specialist would collaborate with organizations like the Columbia Economic Team, Small Business Development Center, and Growing Rural Oregon (GRO) Greater, serving as a liaison between City staff, these organizations, and businesses. The focus of this position will be on enhancing coordination with existing economic development efforts, not replacing them. Key responsibilities would include streamlining city functions, simplifying the development and permitting process, helping businesses understand the development and permitting process, and assessing why businesses fail. The City may be able to use Urban Renewal funds to partially fund this position as long as the position supports implementation of Urban Renewal priorities. Given budget constraints, it is possible this would be a component of a new position, rather than a specialist employee that only focuses on this issue.
- ◆ Ensure that any employee/staffing study for the city includes economic development staffing considerations and adequate staffing for the Planning, Building and Engineering divisions.
- ◆ Increase communication with and support for businesses, such as by proactively communicating about construction impacts such as road closures and help with navigating the development and permitting process.
- ◆ Develop a business growth and attraction strategy to attract identified target industries and other businesses that St. Helens lacks (such as more healthcare services) to ensure that there are goods, services, and other amenities to serve businesses and residents.
- ◆ Develop programs to attract businesses in identified target industries, considering tax incentives, land use controls, and capital improvement programming. Consider targeting incentives in Urban Renewal Areas.
- ◆ Create a "How to Do Business in St. Helens" packet, outlining general timelines and expectations. Coordinate with the Small Business Development Center to include relevant resources.
- ◆ Streamline development processes for commercial and industrial lands.
- ◆ Develop a checklist outlining the steps a developer must follow to navigate the development process.



GOAL B: ENSURE THAT ST. HELENS HAS SUFFICIENT LAND AND INFRASTRUCTURE CAPACITY TO SUPPORT A DIVERSE RANGE OF EMPLOYMENT OPPORTUNITIES

Policies

- ◆ Ensure that St. Helens has enough land zoned to provide industrial and commercial opportunities, periodically monitoring land development and updating the land use map to ensure that there is enough land in each designation to accommodate expected growth. Encourage land uses that are compatible with existing and planned transportation infrastructure, ensuring compatibility with residential uses.
- ◆ Coordinate capital improvement planning with economic development planning to ensure infrastructure availability to employment lands.
- ◆ Partner with providers of infrastructure not provided by the City, such as electricity, natural gas, and high-speed internet, to ensure service is available when needed.
- ◆ Collaborate with the Port of Columbia County to prioritize strategic infrastructure development that activates Port-owned properties in St. Helens
- ◆ Support the cleanup and remediation of key distressed properties and brownfields in St. Helens.

Actions

- ◆ Partner with Columbia River People's Utility District (CRPUD) to increase access to electrical power throughout the City.
- ◆ Partner with Portland General Electric, which supplies power exclusively to a majority of the St. Helens Industrial Business Park.
- ◆ Continue to work with state partners and electrical companies to increase access to electrical power to St. Helens and other communities in the state.
- ◆ Continue to support regional and local internet feasibility studies and future implementation of regional high-speed internet.
- ◆ Monitor development in commercial and industrial areas. As development or rezoning occurs, evaluate whether the city continues to have enough commercial and industrial land as defined in the most recent adopted Economic Opportunity Analysis to support employment growth.
- ◆ Coordinate capital improvement planning with the City's Public Works Department to ensure infrastructure availability on employment land and continue to pursue funding for needed infrastructure to support economic development activities.
- ◆ Conduct a code audit to ensure that zoning regulations are aligned with the City's goals and policies. As a part of the code audit, conduct a review of the Light Industrial zone to determine whether and what types of commercial uses could be appropriately accommodated. This review should assess compatible commercial uses, their potential impacts on industrial activities, and their consistency with the City's objectives. Consider tools such as overlay zones, adjustments to



permitted uses, or other mechanisms to support targeted commercial activity while maintaining the primary function of industrial land.

- ◆ As part of the code audit, identify barriers to development of healthcare and education facilities, such as the uses allowed in St. Helens commercial and industrial zones.

GOAL C: RETAIN AND ATTRACT INDUSTRIAL DEVELOPMENT THAT DIVERSIFIES ST. HELENS' ECONOMIC BASE, SUPPORTS HIGHER-THAN-COUNTY-AVERAGE-WAGE JOB CREATION AND PROVIDES A BALANCED TAX BASE

Policies

- ◆ Encourage the redevelopment and repurposing of former industrial sites.
- ◆ Discourage the leapfrog development of industrial lands, unless there is a program to provide sewer and water to intervening properties.
- ◆ Preserve prime industrial land while considering opportunities for rezoning non-prime industrial areas along key commercial corridors.
- ◆ Work with applicable agencies at the state and federal levels in enacting controls and performance standards for industrial operators to reduce the possibility of adverse impacts on the environment.

Actions

- ◆ Define "prime industrial lands,"¹ identify those lands in St. Helens, and preserve them for industrial uses.
- ◆ Conduct a market study to identify key opportunities to rezone non-prime heavy or light industrial land to commercial land to ensure that St. Helens has enough commercial land to support growth.
- ◆ Determine if there is need to rezone heavy industrial land to light industrial to provide more flexibility for future uses.
- ◆ Prepare the St. Helens Industrial Business Park site for redevelopment, including acquiring funding for necessary infrastructure improvements.
- ◆ Work with the Port of Columbia County, Columbia Economic Team, and other partners to coordinate regional efforts around recruitment and strategies surrounding economic incentives.
- ◆ Work with the Port of Columbia County, Columbia Economic Team, and other partners to promote St. Helens as a prime business location. Highlight key advantages, such as

¹ OAR 660-009 defines prime industrial land as: "... 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."



access to ample water supply, strong public safety supported by a local police force, and other benefits.

- ◆ Partner with Oregon Manufacturing Innovation Center (OMIC) and OMIC R&D in Scappoose for potential industrial businesses that may locate in St. Helens, and workforce training opportunities.

GOAL D: FOSTER SMALL BUSINESS GROWTH AND ENTREPRENEURSHIP

Policies

- ◆ Support the retention, growth and expansion of local small businesses.
- ◆ Encourage entrepreneurship and innovation in the community.

Actions

- ◆ Partner with organizations like Growing Rural Oregon (GRO) Greater, Main Street Alliance, the South Columbia County Chamber of Commerce, Columbia Economic Team, and the Small Business Development Center to provide resources and support for local entrepreneurs.
- ◆ Work with partners to support the creation of a business incubator or co-working space to support start-ups and small businesses.
- ◆ As staff capacity allows, develop a work plan for business outreach to understand unmet workforce needs and identify opportunities for workforce development to meet those needs. The outreach plan should focus either on a location for outreach each year (e.g., downtown) or should be sector focused (e.g., manufacturing or downtown commercial). Set a goal of number of businesses to reach out to each year and topics to discuss.
- ◆ Develop a strategy and materials about the ways that the City can help businesses, focusing on the value the City can provide to support businesses in St. Helens. These materials could be used on the City's webpage and in presentations to businesses about economic development.
- ◆ Explore opportunities with partner organizations to incentivize property owners to invest in their properties and encourage them to lease them.
- ◆ Continue to coordinate and partner with organizations that provide k-12 education and workforce development.

GOAL E: FOSTER VIBRANT COMMERCIAL ZONES WITH A MIX OF RETAIL AND SERVICE OPTIONS THAT SERVE THE NEEDS OF RESIDENTS AND ENHANCE DESTINATION APPEAL

Policies

- ◆ Make commercial designation large enough to accommodate a large variety of commercial development with sufficient buffers. Encourage a variety of retail shopping



activities to concentrate in core commercial areas to enhance their attractiveness for a broad range of shoppers.

- ◆ Encourage in-filling of vacant lands within commercial areas.
- ◆ Prioritize the development of the Riverfront District as a key commercial and tourism hub.
- ◆ Support the revitalization of the Houlton Business District.
- ◆ Improve connections and encourage development to better connect the Riverfront and Houlton Business Districts.
- ◆ Enhance the aesthetic appeal, functionality, and economic vitality of key commercial corridors and districts through strategic public infrastructure investments and design standards.
- ◆ Support retail businesses that encourage foot traffic in the Riverfront District.

Actions

- ◆ Continue to implement the US 30 and Columbia Boulevard/St. Helens Street Corridor Master Plan and Riverfront Connector Plan to enhance and better connect the Riverfront and Houlton Business Districts through improved transportation links, wayfinding, and gateways.
- ◆ Work with mapping services (e.g., Google Maps) to ensure proper routing through the Houlton Business District rather than the industrial area.
- ◆ Develop and implement public facility designs and development standards to revitalize businesses and business districts in the US 30 and Columbia Boulevard/St. Helens Street Corridor Master Plan area.
- ◆ Create gateways and improve access and wayfinding signage to the Houlton Business and Riverfront Districts.
- ◆ Improve the appearance, attractiveness, and safety of the Houlton Business District and Riverfront District through an enhanced street design that includes street trees, landscaping, and more public spaces and pedestrian amenities. Explore opportunities for rezoning industrial land along key corridors where some conversions have already occurred, while preserving prime industrial land.
- ◆ Consider long-term rezoning options for the oversized wastewater treatment plant area to expand the Riverfront District. This is based on potential reduction of the wastewater lagoon size of relocation of the plant.
- ◆ As funding or resources are available, develop a parking management strategy for the Riverfront District using assistance from the Transportation Growth Management Program (a Joint Program of DLCD and ODOT).



GOAL F: ENHANCE TOURISM AS A KEY ECONOMIC DRIVER

Policies

- ◆ Promote year-round tourism opportunities to extend beyond the popular Halloween season, through partnerships, development of infrastructure, and leveraging assets. Recognize and capitalize on the historical nature of St. Helens.
- ◆ Ensure Transient Lodging Tax spending aligns with the City's broader economic development and tourism goals.
- ◆ Integrate recreational opportunities into the Riverfront District, creating public spaces that promote access to and enjoyment of the Columbia River.

Actions

- ◆ Work with tourism consultant to develop a comprehensive tourism strategy that includes events and attractions for all seasons (beyond Halloweentown) building on St. Helens' unique history, supported by a marketing campaign to promote St. Helens as a year-round destination.
- ◆ Partner and coordinate with organizations such as Columbia Economic Team, the Main Street Alliance, and the Columbia County Museum Association to develop a Heritage Tourism strategy, with attention planning celebrations of historical milestones in St. Helens' history.
- ◆ Develop a plan for the allocation of Transient Lodging Tax (TLT) revenues, prioritizing initiatives that drive year-round tourism.
- ◆ Explore opportunities to leverage TLT funds to attract matching grants or private investment in tourism-related infrastructure and marketing efforts.
- ◆ Partner with the Columbia Economic Team (as the Destination Management Organization) to tap into tourism funding from agencies like Travel Oregon
- ◆ Partner with developer of a boutique hotel on City owned riverfront site and identify other opportunities for development of additional hotels.
- ◆ Explore the potential for St. Helens to become a destination for small ships such as local dinner cruises.
- ◆ Expand tourism opportunities for all seasons through initiatives such as:
 - Creating a farmers' market
 - Growing the summer concert series
 - Developing water taxi service
- ◆ Investigate opportunities to grow sports fishing, kayaking, windsurfing activities, and other water-based activities, including the development of necessary onshore and in-water amenities.
- ◆ Support business uses in the Riverfront District that enhance recreational uses on the water.



- ◆ Continue partnering with and supporting the St. Helens Marina in managing Sand Island.
- ◆ Investigate opportunities and partnerships for bicycle sharing or renting bicycles, with a focus on opportunities for bicycling between the Houlton Business and Riverfront Districts. The City may be able to provide space for bicycle sharing or a “popup” rental business.
- ◆ Support development of multi-use trails and other recreational opportunities in St. Helens, including infrastructure necessary to support bicycling, such as between the Houlton Business and Riverfront Districts.
- ◆ Evaluate opportunities for seasonal transit or tram that connects the Houlton Business and Riverfront Districts.



1. Introduction

The City of St. Helens last updated its Economic Opportunities Analysis (EOA) in 2008. Since then, the local economy experienced significant changes due to events such as the Great Recession and the COVID-19 pandemic. A key factor that will shape St. Helens' economic future is the ongoing Waterfront Redevelopment Project, which represents a pivotal opportunity for the city's economic growth.

The waterfront area, formerly a center of industry in St. Helens, had its remaining mills close in the 2000s, resulting in job losses and reduced activity in the historic downtown. In 2015, the City acquired two major waterfront properties: the former Veneer Mill site (24 acres) and the former Paper Mill site (204 acres). These, along with the City's wastewater treatment plant property (50 acres), comprise the Waterfront Redevelopment Project. This project aims to transform these areas into new economic drivers for St. Helens:

- ◆ **The Riverfront Redevelopment Property** (former Veneer Mill site) offers an opportunity for mixed-use development, leveraging its waterfront location and proximity to downtown.
- ◆ **The Central Waterfront Property**, currently housing the wastewater treatment facility, is being evaluated for potential repurposing to expand community access and create economic development opportunities.
- ◆ **The St. Helens Industrial Business Park** (former Boise White Paper property) presents a significant opportunity to attract new employers, with its expansive industrial area and proximity to US 30.

From 2008 to 2022, St. Helens experienced a shift in its economic landscape. The manufacturing sector, particularly wood products and paper manufacturing, declined, resulting in a loss of about 500 jobs. However, this period also saw growth in sectors such as healthcare and accommodation and food services. These industries have helped stabilize overall employment levels, although they typically offer lower wages compared to the manufacturing jobs they replaced.

Recent policies, including the CHIPS Act and state investments in mass timber, have rekindled interest in manufacturing. St. Helens is well positioned to capitalize on these opportunities, given its available industrial land, deepwater port, and proximity to Portland's labor market. The city's growing tourism potential, boosted by events like Spirit of Halloweentown, and its control over key waterfront sites further enhance its economic prospects across various industries.

Updating the EOA now allows St. Helens to reassess its employment land needs and economic development efforts in light of these changes and assets. It will inform revised Comprehensive Plan policies to capitalize on opportunities and address challenges. The EOA forecasts employment growth from 2025 to 2045 and evaluates the required types and amounts of employment land to support this anticipated growth, with a focus on industries important to the city's economic future. Moreover, the EOA provides a detailed inventory of commercial and



industrial lands within St. Helens' urban growth boundary (UGB), ensuring a clear understanding of available areas for employment expansion. Additionally, it outlines specific actions the City could undertake to achieve its economic development goals and policies.

The EOA draws from a range of data sources, including the Oregon Employment Department, Portland State University Population Forecasts, the U.S. Bureau of Economic Analysis, the U.S. Bureau of Labor Statistics, and the U.S. Census.

Framework for an Economic Opportunities Analysis

The content of this report is designed to meet the requirements of Oregon Statewide Planning Goal 9 and the administrative rule that implements Goal 9 (OAR 660-009). The analysis in this report is designed to conform to the requirements for an EOA in OAR 660-009.

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 that are reasonably expected to be needed to accommodate projected employment growth based on the 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. Local governments are also encouraged to assess community economic development potential through a visioning process or some other public input-based process in conjunction with state agencies.
2. *Industrial and commercial development policies (OAR 660-009-0020)*. Cities 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.
3. *Designation of lands for industrial and commercial uses (OAR 660-009-0025)*. Cities and counties must adopt measures to implement policies pursuant to OAR 660-009-0020. Appropriate implementation measures include amendments to plan and zone map designations, land use regulations, public facility plans, and transportation system plans. More specifically, plans must identify the approximate number, acreage, and characteristics of sites needed to accommodate industrial and other employment uses to implement plan policies and must designate serviceable land suitable to meet identified site needs.



Stakeholder Engagement Process

The development of the EOA was informed by a Technical Advisory Committee (TAC) comprising city leaders, economic development professionals, nonprofit organizations, and higher education and port representatives, as well as business and property owners. The TAC convened three times throughout the project to provide input and feedback.

In the first meeting, the TAC reviewed key elements such as the buildable lands inventory, employment forecast, competitive advantages, target industries, and land sufficiency. Feedback from this meeting helped shape the foundation of the EOA. The second and third meetings focused on refining economic development goals and policies outlined in the Comprehensive Plan, as well as developing actions for their implementation.

In addition to TAC meetings, ECONorthwest conducted one-on-one interviews with key stakeholders, particularly small business owners, to gain a deeper understanding of the challenges and opportunities they face in St. Helens. Between August and September 2024, ECONorthwest interviewed three business owners and economic development professionals. The insights gathered from these interviews contributed to the analysis of St. Helens' competitive advantages and disadvantages, and they further informed the development of economic goals, policies, and actions.

The project also featured two joint meetings with the Planning Commission and City Council at key project milestones. These public meetings allowed decision-makers to weigh in on the city's economic development objectives and policies, ensuring alignment with the broader community vision.

Organization of This Report

This report is organized as follows:

- ◆ **Chapter 2. Factors Affecting Future Economic Growth** summarizes historic economic trends that affect current and future economic conditions in St. Helens, as well as St. Helens' competitive advantages for economic development.
- ◆ **Chapter 3. Employment Growth and Site Needs** presents a forecast for employment growth in St. Helens and describes potential growth industries and site needs for potential growth in industries.
- ◆ **Chapter 4. Buildable Lands Inventory** presents a summary of the inventory of employment lands.
- ◆ **Chapter 5. Land Sufficiency and Conclusions** compares the supply of and demand for buildable lands and presents key concluding recommendations for St. Helens.

This report also includes two appendices:

- ◆ **Appendix A. National, State, and Regional and Local Trends**
- ◆ **Appendix B. Buildable Lands Inventory Methodology**



2. Factors Affecting Future Economic Growth

St. Helens is at the edge of the broader Portland Metro region's economy, which spans seven counties across Oregon and Washington (Clackamas, Columbia, Multnomah, Washington, and Yamhill Counties in Oregon and Clark and Skamania Counties in Washington). Its location in the Portland Metro region offers St. Helens residents access to a wider job market while providing local employers with a larger workforce pool. St. Helens' economy consists of an industry mix of government services, healthcare and social assistance, retail trade, accommodation and food services, and manufacturing.

This chapter describes the factors affecting economic growth in St. Helens within the context of national and regional economic trends. The analysis presents the City's competitive advantages for growing, attracting, and retaining businesses, which forms the basis for identifying potential growth industries in St. Helens.

Factors that Affect Economic Development²

The fundamental purpose of Goal 9 (the Statewide Planning Goal for Economic Development) is to ensure that local governments plan for economic development. The planning literature provides many definitions of economic development, both broad and narrow. Broadly,

"economic development is the process of improving a community's well-being through job creation, business growth, and income growth (factors that are typical and reasonable focus of economic development policy), as well as through improvements to the wider social and natural environment that strengthen the economy."³

That definition acknowledges that a community's well-being depends in part on narrower measures of economic well-being (e.g., jobs and income) and on other aspects of quality of life (e.g., the social and natural environment). In practice, cities and regions trying to prepare an economic development strategy typically use a narrower definition of economic development; they take it to mean business development, job growth, and job opportunity. The assumptions are that:

- ◆ Business and job growth are contributors to and consistent with economic development, increased income, and increased economic welfare. From the municipal

² The information in this section is based on previous Goal 9 studies conducted by ECOnorthwest, as well as "An Economic Development Toolbox: Strategies and Methods" published by the American Planning Association.

³ An Economic Development Toolbox: Strategies and Methods, Terry Moore, Stuart Meck, and James Ebenhoh, American Planning Association, Planning Advisory Service Report Number 541, October 2006.



point of view, investment and the resulting increases in property tax are important outcomes of economic development.

- ◆ The evaluation of trade-offs and balancing of policies to decide whether such growth is likely to lead to overall gains in well-being (on average and across all citizens and businesses in a jurisdiction) is something that decision-makers do after an economic strategy has been presented to them for consideration.

That logic is consistent with the tenet of the Oregon land use planning program: all goals matter, no goal dominates, and the challenge is to find a balance of conservation and development that is acceptable to a local government and the State. Goal 9 does not dominate, but it legitimizes and requires that a local government focus on the narrower view of economic development regarding economic variables.

In that context, a major part of local economic development policy is about local support for business development and job growth; that growth comes from the creation of new firms, the expansion of existing firms, and the relocation or retention of existing firms. Specifically, new small businesses are accounting for a larger share of the job growth in the United States. This shift toward a focus on entrepreneurship, innovation, and small businesses presents additional options for local support for economic development beyond firm attraction and retention. Thus, two key questions for economic development policy are addressed in depth in this document:

- ◆ What are the factors that influence business and job growth?
- ◆ What is the relative importance of each?

What factors matter?

Why do firms locate where they do? There is no single answer—firms choose their locations for different reasons. Key determinants of a location decision are a firm's factors of production. For example, a firm that spends a large portion of total costs on unskilled labor will be drawn to locations where labor is relatively inexpensive. A firm with large energy demands will give more weight to locations where energy is relatively inexpensive. In general, firms choose locations they believe will allow them to maximize net revenues: if demand for goods and services are held constant, then revenue maximization is approximated by cost minimization.

The typical categories that economists use to describe a firm's production function are:

- ◆ **Labor.** Labor is often the most important factor of production. Other things being equal, firms look at productivity—labor output per dollar. Productivity can decrease if certain types of labor are in short supply, which increases costs by requiring more pay to acquire the labor that is available, the recruiting of labor from other areas, or the use of less productive labor that is available locally.
- ◆ **Land.** Demand for land depends on the type of firm. Manufacturing firms typically need more space and tend to prefer suburban locations where land is relatively less expensive and less difficult to develop. Warehousing and distribution firms often need to locate close to interstate highways.



- ◆ **Local infrastructure.** An important role of government is to increase economic capacity by improving quality and efficiency of infrastructure and facilities, such as roads, bridges, water and sewer systems, airport and cargo facilities, energy systems, and telecommunications.
- ◆ **Access to markets.** Though part of infrastructure, transportation merits special attention. Firms need to move their product (either goods or services) to market, and they rely on access to different modes of transportation to accomplish this.
- ◆ **Materials.** Firms producing goods, and even firms producing services, need various materials to develop products that they can sell. Some firms need natural resources (i.e., raw lumber) and others may need intermediate materials (i.e., dimensioned lumber).
- ◆ **Entrepreneurship.** This input to production may be thought of as good management or more broadly as a spirit of innovation, optimism, and ambition that distinguishes one firm from another, even though most of their other factor inputs may be quite similar. Entrepreneurial activity, even when unsuccessful, can offer information about the local market that other entrepreneurs can use in starting a new firm. Entrepreneurs are typically willing to take on more risk in uncertain markets, and a strengthened entrepreneurial environment can help to reduce that risk and uncertainty.⁴ Entrepreneurs also tend to have more mobility than larger firms and are more likely to locate in areas with a strong entrepreneurial environment.⁵ To some degree, local governments can promote the high quality of life in an area to attract entrepreneurs, in addition to adopting regulations with minimal barriers—or at least clear guidelines—for new small businesses.

The supply, cost, and quality of any of these factors depend on market factors—specifically, on conditions of supply and demand locally, nationally, and even globally. But they also depend on public policy. In general, public policy can affect these factors of production through:

- ◆ **Regulation.** Regulations protect the health and safety of a community and help maintain quality of life. Overly burdensome regulations, however, can be disincentives for businesses to locate in a community. Simplified bureaucracies and straightforward regulations can reduce the burden on businesses and help them react quickly in a competitive marketplace.
- ◆ **Taxes.** Firms tend to seek locations where they can optimize their after-tax profits. Tax rates are not a primary location factor—they typically matter only after businesses have made decisions based on labor, transportation, raw materials, and capital costs. The costs of these production factors are usually similar within a region. Therefore, differences in tax levels across communities within a region are more important in the location decision than are differences in tax levels between regions.
- ◆ **Financial incentives.** Governments can offer firms incentives to encourage growth. In recent years in Oregon (especially the Portland region), incentives have been used

⁴ Tessa Conroy and Stephan Weiler. "Local and Social: Entrepreneurs, Information Network Effects, and Economic Growth" (2017). https://redi.colostate.edu/wp-content/uploads/sites/50/2017/05/gender_gia_Jun2017-2.pdf

⁵ Emil E. Malizia and Edward J. Feser. *Understanding Local Economic Development*. (1999).



more to attract business to consider locating in the Portland region, rather than substantially distinguishing between cities in the Portland region. For manufacturing industries with significant equipment costs, however, property or investment tax credit or abatement incentives can play a significant role in location decisions.

This discussion may make it appear that a location decision is based entirely on a straightforward accounting of costs, with the best location being the one with the lowest level of overall costs. Studies of economic development, however, have shown that location decisions depend on a variety of other factors that indirectly affect costs of production. These indirect factors include agglomerative economies (also known as industry clusters), quality of life, and innovative capacity.

- ◆ **Industry clusters.** Firms with similar business activities can realize operational savings when they congregate in a single location or region. Clustering can reduce costs by creating economies of scale for suppliers. For this reason, firms tend to locate in areas where there is already a presence of other firms engaged in similar or related activities.
- ◆ **Quality of life.** A community that features many quality amenities—such as access to recreational opportunities, culture, low crime, good schools, affordable housing, and a clean environment—can attract people simply because it is a nice place to be. A region's quality of life can attract skilled workers, and if the amenities lure enough potential workers to the region, the excess labor supply pushes their wages down so that firms in the region can find skilled labor for a relatively low cost. The characteristics of local communities can affect the distribution of economic development within a region, with different communities appealing to different types of workers and business owners. Sometimes location decisions by business owners are based on an emotional or historical attachment to a place or set of amenities without much regard for the cost of other factors of production.
- ◆ **Innovative capacity.** Increasing evidence suggests that a culture promoting innovation, creativity, flexibility, and adaptability is essential to keeping U.S. cities economically vital and internationally competitive. Innovation is particularly important in industries that require an educated workforce. High-tech companies need to have access to new ideas typically associated with a university or research institute. In addition to innovations in research and development within firms or research institutions, firms may also draw on the innovative capacity of entrepreneurs in an area. These entrepreneurs may be former employees of the larger firm or businesses that relocated to an area because of the proximity to an industry cluster. Strong networks and communication between firms, research institutions, and entrepreneurs are key components to leveraging innovative capacity in an area.⁶ Local governments are well equipped to help foster these networks through supporting economic development tools such as small business assistance centers or incubation centers. Government can also be a key part of a community's innovative culture through the

⁶ Nancey Green Leigh and Edward Blakely. *Planning Local Economic Development: Theory and Practice*. 2013.



provision of services and regulation of development and business activities that are responsive to the changing needs of business.

How important are these factors?

To understand how changes in public policies affect local job growth, economists have attempted to identify the importance for firms with different locational factors. They have used statistical models, surveys, and case studies to examine detailed data on the key factors that influence the business location decision.

Economic theory says that firms locate where they can reduce the costs of their factors of production (assuming demand for products and any other factors are held constant). Firms locate in regions where they have access to inputs that meet their quality standards at a relatively low cost. Because firms are different, the relative importance of different factors of production varies both across industries and, even more importantly, across firms.

No empirical analysis can completely quantify firm location factors because numerous methodological problems make any analysis difficult. For example, some would argue simplistically that firms would prefer locating to a region with a low tax rate to reduce tax expenses. However, the real issue is the value provided by the community for the taxes collected. When competing jurisdictions have roughly comparable public services (type, cost, and quality) and quality of life, then tax rates (and tax breaks) can make a difference.

An important aspect of this discussion is that the business function at a location matters more than a firm's industry. A single company may have offices spread across cities, with headquarters located in a cosmopolitan metropolitan area, the research and development divisions located near a concentration of universities, the back office located in a suburban location, and manufacturing and distribution located in areas with cheap land and good interstate access.

Local governments can provide support for new and existing small businesses through policies and programs that support entrepreneurship and innovation. The National League of Cities suggests strategies for local governments, including strong leadership from elected officials; better communication with entrepreneurs, especially regarding the regulatory environment for businesses in the community; and partnerships with colleges, universities, small business development centers, mentorship programs, community groups, businesses groups, and financial institutions.⁷

Local governments in Oregon also play a central role in the provision of buildable land through inclusion of lands in the urban growth boundary (UGB), as well as through the determination of plan designations and zoning and the provision of public services. Typically, businesses need buildable land to locate or expand in a community. However, providing buildable land alone is not sufficient to guarantee economic development in a community—market conditions must create demand for this land, and local factors of production must be favorable for business activity. In the context of expected economic growth and the perception of a constrained land supply in St. Helens, the provision of buildable land has the potential to strongly influence the level and type of

⁷ National League of Cities "Supporting Entrepreneurs and Small Businesses" (2012).



economic development in the city. The provision of buildable land is one of the most direct ways that St. Helens can affect the level and type of economic development in the community.

Summary of the Effect of National, State, and Regional Trends on Economic Development in St. Helens

This section presents a summary of the implications of national, state, and regional economic trends on economic growth in St. Helens, which are presented in Appendix A.

- ◆ **County and local employment growth.** Columbia County experienced a 10% increase in employment between 2008 and 2022, adding about 1,115 jobs. The healthcare and social assistance sector, along with professional and business services, had the largest increases. St. Helens, which accounted for 41% of Columbia County's employment in 2022, had a slower growth rate of 2% during the same period, adding only 88 jobs. The slower growth in St. Helens can be attributed primarily to a decline in manufacturing employment, which was a significant sector in the city. Although St. Helens saw growth in healthcare and social assistance as well as professional and business services, these gains were offset by the manufacturing losses. Looking ahead, while employment in Oregon is expected to continue growing, the rate is likely to slow down. This trend of slower labor force growth may affect St. Helens as well.
- ◆ **Changes in manufacturing.** St. Helens' location near the broader Portland Metro region, availability of industrial land, the presence of existing manufacturing businesses, and access to a skilled workforce present opportunity for growth in manufacturing businesses. In 2022, manufacturing accounted for about 10% of St. Helens' total covered employment and had an average wage of \$62,044, higher than the city's average wage of \$46,490.

Oregon's manufacturing sector grew slightly faster than the national average between 2010 and 2022, with 9.9% growth compared with the national average of 8.4%. However, between 2008 and 2022, the manufacturing sector in St. Helens shrank from 1,000 to 487 employees, a decrease of 513 employees. Much of this decline was driven by the closure of the Boise Inc. paper mill and the loss of over 400 jobs.⁸ In Columbia County over the 2008 to 2022 period, manufacturing decreased by 326 jobs. While St. Helens is well positioned to support growth in manufacturing moving forward, increases in automation could limit the total number of jobs gained through future manufacturing growth.

- ◆ **Shifts in Oregon's high-growth industries.** Oregon's traditionally strong timber and high-tech sectors are anticipated to experience slower job growth in the coming years. Despite investments like the CHIPS Act boosting the semiconductor industry, employment gains may not keep pace with productivity improvements. Similarly, the timber sector is expected to remain under pressure from both market-based

⁸ Darryl Swan, "Boise Inc. halts operations in St. Helens," Portland Tribune, October 18, 2012. Retrieved from: https://www.portlandtribune.com/news/boise-inc-halts-operations-in-st-helens/article_1da0828c-aa68-5b3f-adc4-317020e514cc.html



conditions and federal regulations. However, investments like the Economic Development Administration's \$41.4 million Build Back Better grant to the Oregon Mass Timber Coalition are expected to benefit the industry and potentially drive job growth.

While the high-tech and timber sectors may slow down, other industries in Oregon are poised for expansion. Sectors such as management of companies, food and beverage manufacturing, published software, and healthcare are expected to thrive over the next decade. Additionally, areas with less current employment like consulting, computer system design, financial investment, and scientific research and development (R&D) are forecasted to grow rapidly.

For St. Helens, which has historically relied on timber, these shifts present both challenges and opportunities. Manufacturing employment has been declining since 2008, a trend that may persist if the timber sector continues to struggle. However, state initiatives supporting wood product jobs and opportunities in emerging sectors like food and beverage manufacturing, healthcare, consulting, computer systems, finance, and R&D could help diversify and strengthen St. Helens' economic base.

- ◆ **Increases in automation.** Automation has been a long-running trend in employment, leading to productivity gains across sectors. Many manufacturing processes, such as assembly line production and quality control, have been partially or fully automated, reducing labor needs in those areas. In the service sector, automated ordering systems in fast food restaurants and self-checkout machines in retail stores are examples of how some jobs are moving toward automation. Additionally, advancements in artificial intelligence (AI) are expanding automation beyond routine tasks to jobs previously thought impervious, such as office and cognitive roles.

Increases in automation will continue to affect businesses across industrial and commercial sectors in different ways. For manufacturing and administrative/clerical roles involving routine tasks, automation is more likely to reduce employment as those processes become fully automated. Conversely, automation will drive job growth in higher-skilled roles that are difficult to automate, such as management positions requiring human skills like problem-solving and interpersonal abilities, analytical roles involving critical thinking and decision-making, and technical fields that require human expertise alongside technology. Oregon's overall risk of automation is consistent with national trends, with lower- and middle-wage jobs being at higher risk of automation.

Most sectors will continue to hire employees for specific tasks, although the skills needed for these jobs will shift with increased automation. Given St. Helens' diverse industries—such as healthcare, social assistance, accommodation and food services, and manufacturing—the city likely has roles that span the full spectrum of automation vulnerability, from positions that are low to high risk. St. Helens' access to a skilled workforce is an advantage for businesses in St. Helens if the educational opportunities in the region continue to align with the needs for industries that locate in St. Helens.

- ◆ **The aging of the baby boomer generation and the need for replacement workers.** While St. Helens has a smaller percentage of residents 60 years and older (22%) relative to Columbia County (27%) and Oregon (25%), St. Helens' population is growing



older. St. Helens' median age, which was 31.8 in 2000, increased to 36.3 in 2022. By comparison, Columbia County's median age was 43.1, and Oregon's median age was 39.9 in 2022.

Columbia County's population is expected to continue aging, with people 60 years and older increasing from 28% of the population in 2024 to 33% of the population in 2044, consistent with statewide trends. As workers retire, businesses need to replace them with new workers. This need for replacement workers will continue to drive need for workers. With a relatively younger workforce, St. Helens could be in a good position to replace retiring workers if workforce skills match job openings.

- ◆ **Growth of entrepreneurship and small business.** The average size for a private business in St. Helens was 7.7 employees per business, lower than the state average of 9.4 employees. The creation of new businesses is vital to Oregon's (and St. Helens') economy as their formations generate new jobs and bring innovations into markets. High inflation, rising interest rates, and recession risks, along with tighter access to venture capital and banking lending conditions, have slowed new business formation. However, several favorable factors could mitigate these impacts going forward and support continued strength in entrepreneurship and small business formation in Oregon. These include increased personal savings and home equity levels, which are common funding sources for new businesses, along with the shift toward remote work opportunities and the large millennial generation entering their prime entrepreneurial years (late 30s and early 40s, according to Census Bureau research). St. Helens' access to a relatively young workforce both within the city and from across the Portland Metro region presents opportunities for small businesses to grow in the city.
- ◆ **Continued transformation of retail.** Over the past several decades, the trend toward supercenters and e-commerce has steadily increased. While the growth of online shopping accelerated by the COVID-19 pandemic is likely to persist, there will continue to be demand for the local purchase of retail goods. Consumers prefer physical, brick-and-mortar stores for certain items, such as large furniture, home improvement goods, specialty goods, and groceries. Furthermore, consumer preferences have shifted to spending at restaurants and experience-focused business establishments (e.g., entertainment or recreation). While retail businesses that compete with online retailers may become less common in St. Helens (and other cities), businesses providing experiences (including digital/physical shopping experiences) or goods that cannot be purchased online may grow and expand in St. Helens. This presents opportunities for St. Helens retail industry to build on the city's high quality of life, providing experiences for residents and visitors.
- ◆ **Changing places where work is being done.** The COVID-19 pandemic facilitated a shift in many industries, opening up opportunities for employees to work from home at levels never seen before. Due to the shift to working from home and concerns around the pandemic, many workers started moving away from urban centers in pursuit of more space. Work from home trends are likely to continue—full time for some workers or with options for a hybrid schedule for others. St. Helens' proximity to recreational amenities and the Portland Metro region could make it particularly attractive to



people who work from home full time or have a hybrid work arrangement in the Portland Metro region that requires them to be in the office a few times a week.

- ◆ **Continued increase in demand for energy.** In 2022, energy prices, especially gasoline prices, increased sharply. Reasons for the increase include increased travel and international sanctions against Russia for the war in Ukraine, which result in less Russian fuel on the international market. Energy prices are forecasted to increase over the planning period, which, over the long term, will likely affect the mode of commuting before affecting workers' willingness to commute. For example, commuters may choose to carpool or purchase a more energy-efficient car. Very large increases in energy prices may affect workers' willingness to commute to or from St. Helens, especially workers living or working the farthest from St. Helens or workers with lower-paying jobs. In addition, very large increases in energy prices may make shipping freight long distances less economically feasible, resulting in a slowdown or reversal of offshore manufacturing, especially of large, bulky goods.
- ◆ **Household income and average wages.** St. Helens' median household income (\$77,475) is lower than the county (\$83,265) but slightly higher than the state (\$76,632). The average annual wage at private businesses in St. Helens was about \$46,490, which was lower than the Columbia County average of \$51,135 in 2022 and the state average of \$54,822. While household income data would suggest that some households may have higher disposable incomes to spend on goods and services, the relatively lower wages could make it difficult to attract talent, especially given the tight labor market.
- ◆ **High rates of inflation.** For the last several decades, inflation rates have generally stayed below 3% in the United States. Inflation started to increase in 2021, reaching 9.1% in 2022, the highest level in about 40 years.⁹ In 2023 the annual inflation rate was 3.4%, a marked reduction from the 2022 inflation rate.¹⁰ Continued high rates of inflation may slow economic growth, further erode purchasing power, discourage savings, and lead to a national recession. Consumers may start decreasing spending on nonessentials, which could impact parts of St. Helens' retail and tourism economy.
- ◆ **Potential impacts of global climate change on St. Helens' economy.** Climate change is manifesting in the Pacific Northwest through more frequent and severe weather events, alongside long-term climatic shifts. Increased average temperatures, heightened wildfire risks, and more extreme weather conditions such as heat waves and droughts are becoming more common. These changes are disrupting ecosystems, reducing snowpack and water availability, and affecting air quality due to increased wildfire smoke.

For St. Helens, these broader regional changes could translate into specific economic and community challenges. These environmental shifts pose risks to agriculture, forestry, and water-dependent industries, and they require adaptations in

⁹ Bureau of Labor Statistics, U.S. Department of Labor, *The Economics Daily*, Consumer prices up 9.1% over the year ended June 2022, largest increase in 40 years at <https://www.bls.gov/opub/ted/2022/consumer-prices-up-9-1-percent-over-the-year-ended-june-2022-largest-increase-in-40-years.htm> (visited July 25, 2022).

¹⁰ Bureau of Labor Statistics, U.S. Department of Labor, *The Economics Daily*, Consumer Price Index: 2023 in Review, <https://www.bls.gov/opub/ted/2024/consumer-price-index-2023-in-review.htm>



infrastructure and resource management to mitigate impacts. The local economy, historically reliant on timber, may face further pressures as forestry practices must adapt to increased fire risks and pest outbreaks. Reduced water availability could also impact availability and cost of power from hydropower generation. Adapting to these conditions will require strategic planning to enhance the resilience of critical infrastructure, protect public health against rising temperatures, and possibly diversify the economic base to include industries less vulnerable to climate variability.

Employment Trends in St. Helens and Columbia County

The City of St. Helens last updated its Economic Opportunities Analysis (EOA) in 2008. Since then, the local economy experienced significant changes, affected by events such as the Great Recession and the COVID-19 pandemic. This section of the EOA examines how these broader economic shifts have affected Columbia County and St. Helens over the past 15 years.

Employment Trends in Columbia County

Exhibit 1 shows covered employment¹¹ in Columbia County for 2008 and 2022. Employment increased by 1,115 jobs, or 10%, over this period. The sectors with the largest increases in numbers of employees were healthcare and social assistance (467 jobs), professional and business services (448 jobs), construction (253 jobs), and accommodation and food services (235 jobs). The average annual wage for employment in Columbia County in 2022 was about \$51,135.¹²

¹¹ **Covered** employment includes employees covered by unemployment insurance. Examples of workers not included in covered employment are sole proprietors, some types of contractors (often referred to as "1099 employees"), or some railroad workers. Covered employment data is from the Oregon Employment Department.

¹² Bureau of Labor Statistics, Quarterly Census of Employment and Wages, 2022.



Exhibit I. Covered Employment by Industry, Columbia County, 2008–2022

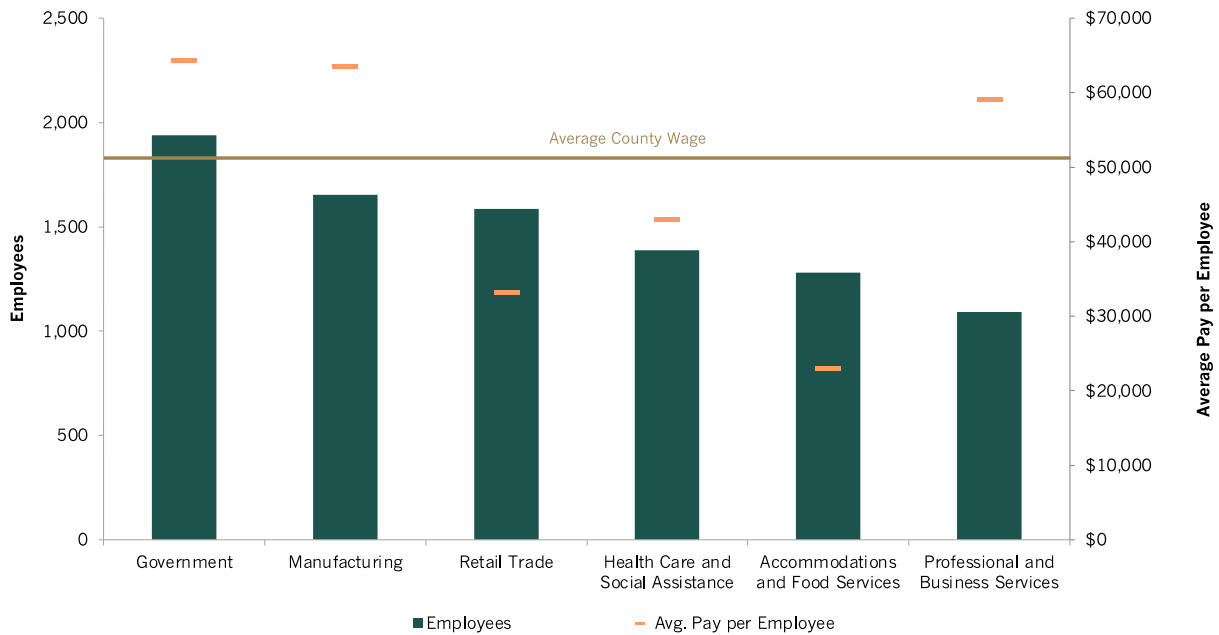
Sector	2008	2022	Change 2008 to 2022		
			Difference	Percent	AAGR
Agriculture, Forestry, Fishing, Hunting and Mining	427	332	-95	-22%	-1.8%
Transportation, Warehousing, and Utilities	541	570	29	5%	0.4%
Construction	459	712	253	55%	3.2%
Manufacturing	1,980	1,654	-326	-16%	-1.3%
Wholesale Trade	144	200	56	39%	2.4%
Retail Trade	1,407	1,587	180	13%	0.9%
Information	114	64	-50	-44%	-4.0%
Finance and Insurance	268	303	35	13%	0.9%
Real Estate and Rental and Leasing	123	115	-8	-7%	-0.5%
Professional and Business Services	645	1,093	448	69%	3.8%
Educational Services	68	104	36	53%	3.1%
Health Care and Social Assistance	922	1,389	467	51%	3.0%
Arts, Entertainment, and Recreation	72	70	-2	-3%	-0.2%
Accommodations and Food Services	1,046	1,281	235	22%	1.5%
Other Services (except Public Administration)	450	459	9	2%	0.1%
Unclassified	(c)	37	n/a	n/a	n/a
Government	2,129	1,940	-189	-9%	-0.7%
Total	10,795	11,910	1,115	10%	0.7%

Source: Bureau of Labor Statistics, Quarterly Census of Employment and Wages, 2008–2022.



Exhibit 2 shows covered employment and average wage for the six largest industries in Columbia County. Jobs in government accounted for approximately 16% of the county's total covered employment, followed by manufacturing and retail trade (14% and 13%, respectively). Of these six sectors, government, manufacturing, and professional and business services pay above the county average wage (\$64,269, \$63,435, and \$59,108, respectively). Jobs in construction, transportation and warehousing, natural resources, wholesale trade, financial activities, and information also paid more per year than the county average, but they accounted for a smaller share of covered employment.

Exhibit 2. Covered Employment and Average Pay by Sector, 6 Largest Sectors Columbia County, 2022



Source: Bureau of Labor Statistics, Quarterly Census of Employment and Wages, 2022.



Employment in St. Helens

Between 2008 and 2022, covered employment in St. Helens increased by 88 employees (2%), at about a 0.13% average annual growth rate. Healthcare and social assistance experienced the greatest nominal increase (264 employees) followed by administrative services (227 employees), while manufacturing experienced the greatest nominal decrease (513 employees) (Exhibit 3). Much of this decline in manufacturing was driven by the closure of the Boise Inc. paper mill in 2012 and the loss of over 400 jobs.¹³

Exhibit 3. Change in Covered Employment, St. Helens UGB, 2008–2022

Sector	Employees		Change in Employment 2008-2018		
	2008	2022	Number	Percent	AAGR*
Agriculture, Forestry, Fishing and Hunting	65	25	(40)	-62%	-6.6%
Construction	126	113	(13)	-10%	-0.8%
Manufacturing	1,000	487	(513)	-51%	-5.0%
Wholesale Trade	39	85	46	118%	5.7%
Retail Trade	662	707	45	7%	0.5%
Transportation and Warehousing	86	80	(6)	-7%	-0.5%
Information	49	12	(37)	-76%	-9.6%
Finance and Insurance	133	148	15	11%	0.8%
Real Estate and Rental and Leasing	80	51	(29)	-36%	-3.2%
Prof., Sci., and Tech. Services and Mgmt. of Companies	137	156	19	14%	0.9%
Admin. / Support and Waste Mgmt / Remediation Serv.	143	370	227	159%	7.0%
Health Care and Social Assistance & Educational Services	575	839	264	46%	2.7%
Arts, Entertainment, and Recreation	27	19	(8)	-30%	-2.5%
Accommodation and Food Services	462	611	149	32%	2.0%
Other Services (except Public Administration)	185	179	(6)	-3%	-0.2%
Government	1,013	988	(25)	-2%	-0.2%
Total	4,782	4,870	88	2%	0.13%

Sectors highlighted in blue have wages higher than the city average.

*Average Annual Growth Rate

Source: Oregon Employment Department, Quarterly Census of Employment and Wages, 2008 and 2019.

¹³ Darryl Swan, "Boise Inc. halts operations in St. Helens," Portland Tribune, October 18, 2012. Retrieved from: https://www.portlandtribune.com/news/boise-inc-halts-operations-in-st-helens/article_1da0828c-aa68-5b3f-adc4-317020e514cc.html



Exhibit 4 shows a summary of covered employment data for the St. Helens UGB in 2022. The sectors with the largest number of employees were government (20% of St. Helens' total covered employment); healthcare and social assistance and educational services (17%); retail trade (15%); accommodation and food services (13%); manufacturing (10%); and administrative services (8%). Average pay in St. Helens for all employees was \$46,490. The average size for a private business in St. Helens was 7.7 employees per business, slightly lower than the state average of 9.4 employees.

Exhibit 4. Covered Employment and Average Pay by Sector, St. Helens UGB, 2022¹⁴

Sector	Establishments	Employees	Average Pay per Employee
Agriculture, Forestry, Fishing and Hunting	5	25	\$40,880
Construction	49	113	\$48,938
Manufacturing	14	487	\$62,044
Wholesale Trade	18	85	\$60,549
Retail Trade	42	707	\$35,179
Transportation and Warehousing	9	80	\$60,549
Information	7	12	\$69,344
Finance and Insurance	19	148	\$59,179
Real Estate and Rental and Leasing	23	51	\$28,248
Prof., Sci., and Tech. Services and Mgmt. of Companies	39	156	\$60,822
Admin. / Support and Waste Mgmt / Remediation Serv.	20	370	\$33,225
Health Care and Social Assistance & Educational Services	162	839	\$44,936
Arts, Entertainment, and Recreation	4	19	\$11,490
Accommodation and Food Services	47	611	\$22,916
Other Services (except Public Administration)	45	179	\$28,043
Government	24	988	\$65,814
Total	527	4,870	\$46,490

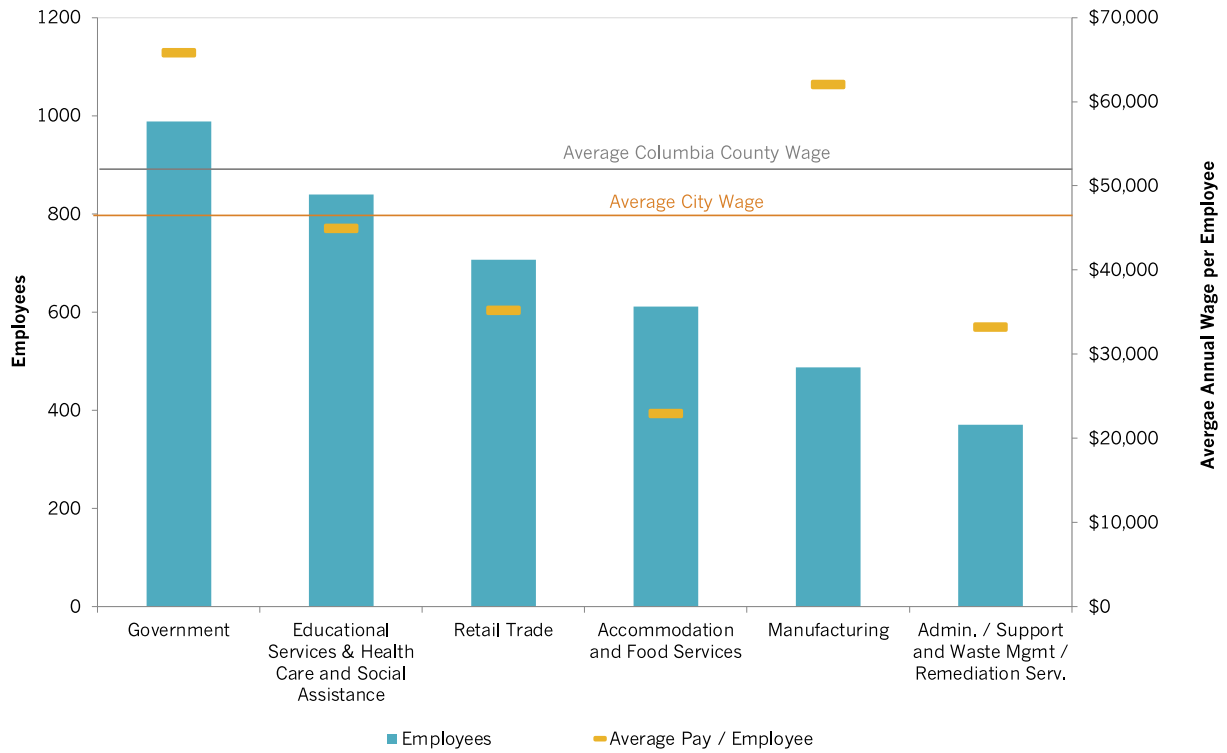
Source: Oregon Employment Department, Quarterly Census of Employment and Wages, 2022.

¹⁴ The following sectors were combined due to confidentiality of QCEW data: agriculture, forestry, fishing, and hunting, and mining; professional, scientific, and technical services and management of companies; healthcare and social assistance and educational services.



Exhibit 5 shows the employment and average pay per employee for the six largest sectors in St. Helens, which account for 82% of covered employment. Of these top six sectors, government and manufacturing had above-average wages. The lowest wages were in accommodation and food services.

Exhibit 5. Covered Employment and Average Pay for Six Largest Sectors, St. Helens UGB, 2022



Source: Oregon Employment Department, Quarterly Census of Employment and Wages, 2022.



Outlook for Growth in Columbia County

Exhibit 6 shows the Oregon Employment Department's forecast for employment growth by industry for the Northwest Oregon region (Benton, Clatsop, Columbia, Lincoln, and Tillamook Counties) over the 2022 to 2032 period. Employment in the region is forecasted to grow at an average annual growth rate of 0.9%.

The sectors that are projected to lead employment growth in the region in terms of total jobs for the 10-year period are leisure and hospitality (adding 2,730 jobs); private education and health services (1,970); government (1,360); and professional and business services (1,240). In sum, these sectors are expected to add 7,300 new jobs, or about 72% of employment growth in the Northwest Oregon region. Columbia County accounts for about 11% of employment in these five counties, and St. Helens accounts for about 41% of the County's employment.

Exhibit 6. Regional Employment Projections, 2022–2032, Northwest Oregon Region (Benton, Clatsop, Columbia, Lincoln, and Tillamook Counties)

Industry Sector	2022	2032	Change 2022-2032		
			Number	Percent	AAGR
Total Private Payroll Employment	78,470	86,780	8,310	11%	1.0%
Natural resources and mining	3,350	3,410	60	2%	0.2%
Mining and logging	780	760	-20	-3%	-0.3%
Construction	4,230	4,850	620	15%	1.4%
Manufacturing	9,030	9,310	280	3%	0.3%
Durable goods	4,610	4,920	310	7%	0.7%
Wood product manufacturing	1,100	1,090	-10	-1%	-0.1%
Nondurable goods	4,420	4,390	-30	-1%	-0.1%
Trade, transportation, and utilities	15,260	16,130	870	6%	0.6%
Wholesale trade	1,050	1,140	90	9%	0.8%
Retail trade	12,320	12,930	610	5%	0.5%
Transportation, warehousing, and utilities	1,890	2,060	170	9%	0.9%
Information	1,070	1,210	140	13%	1.2%
Financial activities	3,950	4,050	100	3%	0.3%
Professional and business services	7,930	9,170	1,240	16%	1.5%
Professional and technical services	3,740	4,550	810	22%	2.0%
Private educational and health services	13,670	15,640	1,970	14%	1.4%
Hospitals	4,380	4,690	310	7%	0.7%
Leisure and hospitality	16,480	19,210	2,730	17%	1.5%
Accommodation and food services	15,400	17,870	2,470	16%	1.5%
Accommodation	4,140	4,900	760	18%	1.7%
Food services and drinking places	11,260	12,970	1,710	15%	1.4%
Other services	3,500	3,800	300	9%	0.8%
Government	24,780	26,140	1,360	5%	0.5%
Federal government	1,170	1,150	-20	-2%	-0.2%
State government	1,380	1,440	60	4%	0.4%
Local government	22,230	23,550	1,320	6%	0.6%
Local government education	16,080	16,640	560	3%	0.3%
Self-employment	6,340	6,790	450	7%	0.7%
Total Employment	109,590	119,710	10,120	9%	0.9%

Note: AAGR is the Annual Average Growth Rate

Source: Oregon Employment Department. Employment Projections by Industry 2022-2032.



St. Helens' Competitive Advantages and Disadvantages

St. Helens' economic development potential is influenced by both local factors and the broader state and national economic trends discussed previously. Economic conditions in St. Helens relative to these conditions in other portions of the Portland Metro region form St. Helens' competitive advantage for economic development. St. Helens' primary competitive advantages are its location along the Columbia River (offering both recreational and commercial shipping opportunities), proximity to Portland's urban amenities, available industrial land for employment growth, and reputation as "Halloweentown," a unique cultural attraction. These features make St. Helens appealing to both residents and businesses seeking a high quality of life combined with work opportunities. The city's ability to leverage these advantages will play a crucial role in attracting firms and fostering economic growth.

The city's existing business base and access to labor, discussed earlier, are fundamental to understanding its competitive position. The following sections delve deeper into these local factors and other elements that contribute to St. Helens' economic advantages.

St. Helens' advantages for economic development include:

- ◆ **Location.** St. Helens is located about 30 miles northwest of Portland, offering employers access to the larger market and workforce of the Portland Metro area. The city's location along the Columbia River provides a dual benefit: it enhances the quality of life for residents and visitors and creates shipping opportunities for businesses through the deepwater Port of Columbia County.

With a 50-minute drive to Portland International Airport and 40 minutes to downtown Portland, St. Helens is strategically positioned to attract businesses seeking affordable locations near a major urban center. It also appeals to workers who value the city's quality of life and outdoor recreational opportunities while maintaining easy access to urban amenities.

Additionally, St. Helens is 7 miles from Scappoose, home to the Oregon Manufacturing Innovation Center R&D (OMIC) and Portland Community College (PCC). While Scappoose has available industrial land to accommodate the anticipated growth in manufacturing businesses that may cluster around OMIC and PCC, St. Helens may also benefit from its proximity to these campuses.

- ◆ **Transportation Infrastructure.** St. Helens is located along Highway 30, which runs north from Portland through St. Helens to Rainier before heading west toward Astoria. Highway 30 connects St. Helens to the broader region and provides opportunities for freight movement. This highway intersects with I-5 in Portland, which is a preferred route for trucking and distribution between California and Washington. Additionally, the city's access to the Port of Columbia County enhances its capabilities for international distribution of goods. The Portland & Western Railroad (PNWR) also carries freight through St. Helens, connecting the city with major markets to the east and west, including Portland, Vancouver, and the Port of Portland. The Port of Columbia County is reliant on freight; therefore, the presence of an active railroad is a more efficient and sustainable alternative to additional trucks on Highway 30.



- ◆ **Port of Columbia County.** The Port of Columbia County is a special district spanning 51 miles along the Columbia River. It stretches from the Clatsop County line in the northwest to the Multnomah County line in the southeast, encompassing the cities of Scappoose, St. Helens, Columbia City, Rainier, and Clatskanie. As an economic hub for the region, the Port provides access to international shipping routes through its deepwater facilities. It owns eight industrial properties totaling 2,400 acres, many of which offer excellent highway, rail, airport, and maritime access. These properties and the Port's infrastructure play a crucial role in supporting business growth, job creation, and expansion of the local tax base. Consequently, the Port of Columbia County serves as a key driver of economic development for St. Helens and the broader region.
- ◆ **Waterfront Redevelopment.** The waterfront has historically been a hub for industry in St. Helens. However, following the closure of its remaining mills in the 2000s, jobs and economic activity in the area diminished, leaving large sections of waterfront property vacant. In 2015, the City acquired two key properties along the waterfront: the former Veneer Mill site (24 acres) and the former Paper Mill site (204 acres). Along with the City's wastewater treatment plant property (50 acres), these acquisitions form the foundation of the Waterfront Redevelopment Project. The City aims to transform these properties to create new opportunities for businesses, residents, and visitors alike while reconnecting the community with its riverfront. The redevelopment will introduce new economic drivers to the city and revitalize the historic downtown.
 - **The Riverfront Redevelopment Property** is a 24-acre site located in the heart of St. Helens' historic Riverfront District, offering scenic views of the Columbia River, Mount Hood, Mount St. Helens, and Sand Island. Previously the site of a plywood veneer plant, it now represents a key opportunity for mixed-use development. The property connects to the Columbia River in the east, the historic Riverfront District to the north, residential neighborhoods to the west, and the Central Waterfront and St. Helens Industrial Business Park to the south. The City acquired the property in 2015, changed the zoning from Heavy Industrial to Riverfront District (a mixed-use zone) in 2017, and has since initiated major projects (including the Riverwalk Project and Streets & Utilities Extension Project) to enhance public access, create pedestrian connections, and prepare the site for future development. These projects are underway, with an expected completion in late 2024, positioning the area for future partnerships with private developers for mixed-use construction.
 - **The Central Waterfront Property** is a 50-acre Heavy Industrial-zoned site located immediately south of the Riverfront District and adjacent to the St. Helens Industrial Business Park. It currently houses the City's 39-acre wastewater treatment facility, which is outdated and oversized, creating environmental and maintenance challenges. The City is exploring options to repurpose part or all of the site to expand public waterfront access, provide additional amenities, and support economic development. This effort would connect two miles of waterfront, improve environmental health by building a modern wastewater facility, and open prime land for potential marine, industrial, and public uses. The



project recently received nearly \$1.4 million in state and federal funding to support redevelopment.

- **The St. Helens Industrial Business Park** is a 204-acre industrial site, formerly home to the Boise White Paper Mill, acquired by the City in 2015. It is predominately zoned for Heavy Industrial, with some Light Industrial area. As the largest industrial employment property within city limits, it is strategically located at the intersection of Old Portland Road, South 18th Street, and Kaster Road. The site features a state waterway lease and an operational rail spur connecting to the Portland & Western Railroad. In 2020, the City adopted a parcelization and funding plan to guide redevelopment efforts, restore family-wage jobs, increase utility revenues, and return the property to the tax rolls.
- ◆ **Buildable Industrial Land.** The Buildable Lands Inventory (BLI) in Chapter 4 shows that St. Helens has 243 acres of unconstrained buildable industrial land in the urban growth boundary (UGB). St. Helens has industrial land in a variety of site sizes, ranging from sites smaller than an acre to six sites larger than 10 acres. This amount of buildable industrial land, including multiple sites larger than 10 acres, provides places to accommodate future manufacturing growth. One particular asset is the City-owned St. Helens Industrial Business Park. This industrial area is located close to US 30, presenting the City with a significant opportunity to attract new employers to the area.
- ◆ **Business Support Services.** St. Helens has an active network of organizations supporting businesses, including the Columbia County Economic Team, the Small Business Development Center (SBDC), and Growing Rural Oregon (GRO) team. The Columbia County Economic Team supports established companies pursuing expansion with a range of technical assistance, such as support with permitting. The SBDC is part of the Oregon SBDC network that connects local and younger businesses to statewide resources. They offer support to businesses interested in growing with business advising, business plan development, access to capital, marketing plans, hiring, and other regulatory processes. The GRO team helps local businesses identify opportunities, share and leverage best practices, initiate networks, and connect to new ideas, resources, and industry leaders.
- ◆ **Spirit of Halloweentown.** Spirit of Halloweentown is a monthlong festival held annually in St. Helens, inspired by the 1998 Disney Channel movie of the same name, which was partially filmed in the city. Each October, St. Helens transforms its historic Riverfront District into a replica of the movie's fictional town, attracting thousands of visitors with themed events, decorations, and activities. This unique cultural attraction has become a significant economic driver for St. Helens, boosting tourism, supporting local businesses, and enhancing the city's brand recognition. The festival not only generates direct revenue through ticket sales and increased foot traffic to local shops and restaurants but also creates seasonal job opportunities and encourages year-round interest in the city. Halloweentown has effectively put St. Helens on the map as a destination, contributing to its economic development by diversifying its economy and attracting potential residents and businesses drawn to the city's creative and community-oriented atmosphere.



- ◆ **Labor Market.** St. Helens' workforce is relatively younger, with a larger share of residents under 40 years of age than in Columbia County and Oregon overall. St. Helens' labor force participation rate (64%) is slightly higher than the county average (59%). Although the share of St. Helens' working-age population with a bachelor's degree or higher (15%) is lower relative to the county average (18%) and state average (35%), the city has a higher share (39%) of residents with an associate's degree.

Employers have access to workers in various stages of their careers, including students attending colleges and universities within the Portland Metro region. Additionally, St. Helens benefits from a robust Career and Technical Education Program in its high school, offering seven pathways that provide college credits transferable to many community colleges and four-year universities or that provide direct pathways to jobs and trade programs.

- ◆ **Lower Taxes and Urban Renewal.** St. Helens has comparatively lower property and business tax rates, as businesses and workers are not subject to Portland Metro taxes. Additionally, St. Helens has an urban renewal district with funds specifically allocated to support infrastructure improvements and the rehabilitation and enhancement of storefronts within the district.
- ◆ **Connections to the Columbia River.** St. Helens' location along the Columbia River not only enhances the quality of life for residents and visitors but also presents significant economic opportunities. The deepwater access provided by the Port of Columbia County allows businesses in St. Helens to connect to global shipping routes, making it an ideal location for industries requiring maritime transport. The city's riverfront also supports recreational activities such as boating and fishing, which can draw visitors and contribute to the local tourism industry. Furthermore, the riverfront's proximity to the city's downtown and waterfront redevelopment areas will provide an attractive setting for new development, encouraging investment in both commercial and residential projects. These connections between the river, the port, and the city's growing economy create a strong foundation for future growth.
- ◆ **Quality of Life.** St. Helens offers a high quality of life, attracting both residents and visitors with its prime location on the Columbia River and diverse recreational options. The city provides easy access to parks, hiking trails, and cycling routes, complemented by river-based activities such as boating. Throughout the year, St. Helens comes alive with various events and festivals. The most notable is the Spirit of Halloweentown, which draws thousands of visitors annually.

These attractions serve multiple purposes. They enhance the lifestyle of residents, draw tourists to the area, and create opportunities for businesses in the tourism and service sectors. The combination of natural beauty, outdoor activities, and community events makes St. Helens an appealing destination for living, visiting, and doing business.

St. Helens' disadvantages for economic development include:

- ◆ **Distance from an Interstate.** While Highway 30 provides essential connectivity, the lack of direct access to major interstate highways like I-5 can make St. Helens less



attractive for certain industrial and commercial businesses that depend heavily on interstate transport routes. This limitation can hinder the efficient movement of goods and materials, potentially increasing transportation costs and delivery times for businesses.

- ◆ **Traffic and Congestion.** Highway 30 and the PNWR railroad cut through the center of St. Helens and bifurcate the commercial and retail corridor, leading to high automobile traffic and low pedestrian accessibility. Significant levels of congestion, particularly during peak commuting hours, place residents and employees at a disadvantage with respect to mobility and connectivity.
- ◆ **Connections with Highway 30 to other areas within the city.** Most people enter and leave St. Helens via Highway 30, which lacks clear connections with the Riverfront District and the Houlton District. Part of the challenge is the distance from Highway 30 to the Riverfront District, a bit more than two miles. Another part of the challenge is that people passing through St. Helens may be unaware of the recreational and other amenities in the Riverfront District and the Houlton District. This issue could be solved, at least in part, through increased wayfinding guidance and other approaches to guiding visitors to these districts.
- ◆ **Power Supply Issues.** St. Helens and the broader Columbia County face significant power supply limitations, which can deter energy-intensive industries such as solar manufacturing from establishing operations in the area. Reliable and sufficient power supply is crucial for many modern industries, and the current limitations pose a barrier to attracting and retaining such businesses. The Columbia River People's Utility District (CRPUD) is the power provider for St. Helens—the exception being a majority of the St. Helens Industrial Business Park. When CRPUD took over much of the region's power service in 2000 from Portland General Electric (PGE), the St. Helens Industrial Park (then the Boise Cascade mill) was excluded (i.e., the "Boise Cascade Exclusion").
- ◆ **Health and Human Services.** As a city on the outskirts of the Portland Metro area, St. Helens receives fewer resources for critical services, such as mental health and crime prevention, compared to more central locations. As St. Helens grows and its needs change, the lag in resources can negatively impact the quality of life for residents and make the area less attractive for new residents and businesses.
- ◆ **Limited Commercial Land.** The BLI in Chapter 4 shows that St. Helens has about 58 acres of unconstrained buildable commercial land in the UGB. Most of St. Helens' commercial sites are smaller than two acres, with two commercial sites between 2 and 5 acres and three sites between 5 and 10 acres. St. Helens has a limited amount of commercial land, which may limit commercial development.
- ◆ **Lack of Flex Spaces for Growing Businesses.** St. Helens has a limited number of buildings that are suitable to accommodate small commercial and light industrial businesses that are looking to expand their operations.
- ◆ **Access to Capital.** Access to capital is a barrier for businesses, especially those with 50 to 100 employees. While there are local lenders, they often operate on a small



scale, making it challenging for businesses to secure the necessary funding for expansion or new projects.

- ◆ **Property Ownership and Investment.** Some building owners in St. Helens do not reside in the community and are not actively invested in local development. They may be reluctant to sell or upgrade their properties, which can stifle redevelopment and economic growth.
- ◆ **Labor Market Challenges.** Although St. Helens has a younger workforce with a strong culture of hard work, there is a lack of diversity in job opportunities. Additionally, service sector jobs in St. Helens struggle to attract and retain staff as employees can often find higher-paying similar jobs closer to Portland. To attract and retain employees, businesses need to offer competitive wages; however, they have difficulty raising their prices to support these higher wages.
- ◆ **Population Growth and Infrastructure.** Rapid population growth in St. Helens brings challenges, including the need for expanded infrastructure and services. As the population increases, it takes time for resources to catch up, potentially leading to strains on existing services and infrastructure. Addressing these challenges proactively is crucial for maintaining the quality of life and supporting sustainable growth.
- ◆ **Limited City Staff Capacity.** Stakeholders in St. Helens have expressed concerns that the city's limited staff capacity is negatively affecting its business-friendly reputation. Insufficient staffing is leading to longer wait times for permits and services, as well as poor communication with businesses and the broader community. These issues are creating significant challenges for both existing businesses and potential developers and new businesses.

Public Facilities and Services

Provision and costs of public facilities and services can impact a firm's decision about expanding or locating in a city. One of the primary considerations about developing a site is whether it has infrastructure to or near the site, including water, wastewater, stormwater, and roads. If infrastructure is not developed to or near the site, the consideration becomes whether infrastructure can be extended in a timely manner and at a financially feasible cost.

This section discusses St. Helens' water system, storm system, and wastewater system infrastructure. It answers the question of whether St. Helens has or is planning to have sufficient capacity to support the amount and types of development proposed in the EOA.

WATER

Overall, St. Helens has a sufficient water supply to accommodate existing and future water needs for industrial and commercial uses. St. Helens is in the process of upgrading its reservoir storage capacity to meet future demand.

- ◆ **Water Supply:** St. Helens has four active water rights, which are used for municipal water supply (Ranney Wells #1, #2, and #3 as well as Bayport Well). The City has a



projected **surplus** of 3.1 million gallons per day by 2041 in Ranney Wells #2 and #3. Ranney Well #1 and Bayport Well are not used in day-to-day operations but could be additional daily supply if needed. The City's water filtration facility, built in 2006, treats the water and provides the primary source of potable water to the City's users. The City has ample available water supply to meet 20-year projected employment demands.

- ◆ **Water storage capacity:** The City operates four reservoirs that provide essential water storage for operations, equalization, emergencies, and fire protection. Currently, the City's 2-million-gallon reservoir is offline due to ongoing leak assessments. Even with this reservoir back online, there is a projected storage deficit of nearly 1 million gallons by 2041. As a result, instead of repairing the existing leaking reservoir, the City is actively designing and fundraising for an infrastructure project to replace the reservoir at a new site and increase its capacity to meet future demand.

WASTEWATER

The city's existing wastewater treatment capacity is adequate to support projected employment growth. However, upgrades to pipeline capacity are anticipated in certain sewer basins due to undersized trunklines, with improvements expected to be constructed by 2027.

- ◆ **Wastewater Treatment Capacity:** The current wastewater treatment plant was originally built for large industrial users, such as paper pulping plants, that no longer operate in the city. As a result, the plant has sufficient capacity to accommodate anticipated employment growth and future industrial users with increased treatment needs.
- ◆ **Wastewater Pipeline Capacity:** The Wastewater Master Plan (November 2021) revealed that many pipes across the six sanitary sewer basins are at or over capacity, with nearly all basins containing manholes that may overflow during significant storm events. These deficiencies are primarily due to high peak flows and undersized trunklines. Depending on the location of new employment developments, they may rely on this inadequate pipeline system. Since 2022, the city has been collecting impact fees from developers to fund infrastructure improvements and has secured \$2.5 million in Community Development Block Grant (CDBG) funds for the design and engineering of upgrades in three priority sewer basins, along with a \$16 million DEQ loan for construction. These improvements are anticipated to be completed by 2027, addressing a majority, but not all, pipeline capacity issues.

STORMWATER

St. Helens has identified necessary stormwater system improvements in its Capital Improvement Plan. All new commercial and industrial developments are required to provide stormwater detention for 2-year, 10-year, and 25-year events, along with safe overflow management for a 100-year storm. While the need for improvements is recognized, no issues have been identified that would hinder new business development during the planning period.



- ◆ **Stormwater Capacity:** According to the Stormwater Master Plan (November 2021), there are capacity-related deficiencies in the existing system, leading to flooding and surcharging in most major drainage basins. These issues have been prioritized in the Capital Improvement Plan, although no storm impact fees have been introduced as they have for the sewer system. New commercial and industrial developments must ensure that post development flow rates do not exceed predevelopment rates for 2-year, 10-year, and 25-year events. Additionally, the City is developing code amendments to comply with the new Willamette Basin Mercury Total Maximum Daily Load (TMDL) requirements, which could result in higher development costs to meet the updated stormwater standards.

TRANSPORTATION

The City previously completed a Transportation System Plan (TSP) in 2011 and is about to begin updating it, which may include recommended capital improvements along US 30.

The US 30/Gable Road intersection is the most problematic area for St. Helens, with traffic analyses over the years showing the PM peak hour consistently exceeding functional capacity. A recent traffic study for the Broadleaf Arbor apartment complex also revealed that the AM peak hour is now above capacity for the first time. The current TSP identifies needed improvements for this intersection, mainly involving widening for additional turn lanes. However, these improvements are complicated by the railroad crossing, which adds complexity and cost, and may require land acquisition. Transportation needs, including these challenges, will be further evaluated in the upcoming TSP update.



3. Employment Growth and Site Needs

Goal 9 requires cities to prepare an estimate of the amount of commercial and industrial land needed over a 20-year planning period. The estimate of employment land needs and site characteristics for St. Helens is based on expected employment growth and the types of firms that are likely to locate in St. Helens. This chapter presents an employment forecast and analysis of potential growth industries that build from recent economic trends.

Forecast of Employment Growth and Land Demand

Demand for industrial and commercial land will be driven by the expansion and relocation of existing businesses and by the growth of new businesses in St. Helens. This employment land demand is driven by local growth independent of broader economic opportunities.

The employment projections in this section build off St Helens' existing employment base, assuming future growth will follow the Oregon Employment Department's (OED) regional forecasts for employment growth for the 2025 to 2045 period. The employment forecast does not consider a major change in employment that could result from the location (or relocation) of one or more large employers in the community during the planning period. Such a major change in the community's employment would exceed the growth anticipated by the City's employment forecast and its implied land needs (for employment, but also for housing, parks, and other uses). Major economic events, such as the successful recruitment of a very large employer, are difficult to include in an economic opportunities analysis. The implications, however, are relatively predictable: more demand for land (of all types) and public services.

ECONorthwest has four steps to project demand for industrial and commercial land:

1. **Establish base employment for the projection.** The steps begin with the estimate of covered employment in St. Helens, as shown in Exhibit 4. Since covered employment does not include all workers, this number is adjusted to reflect total employment in the city.
2. **Project total employment.** The projection of total employment considers forecasts and factors that may affect employment growth in St. Helens over the 20-year planning period.
3. **Allocate employment.** This step involves allocating types of employment to different land use types.
4. **Estimate land demand.** This step estimates general employment land demand based on employment growth and assumptions about future employment densities.

This analysis applies methods established by administrative rule and input received from St. Helens' Technical Advisory Committee (TAC).



Employment Base for Projection

The purpose of the employment projection is to model future employment land needs for general employment growth. The forecast of employment growth in St. Helens starts with a base of employment on which to build the forecast. Exhibit 7 shows EConorthwest's estimate of total employment in St. Helens in 2022.

To develop the figures, EConorthwest started with estimated covered employment in the St. Helens UGB from confidential Quarterly Census of Employment and Wages (QCEW) data provided by the Oregon Employment Department. Based on this information, St. Helens had about 4,870 covered employees in 2022, shown in Exhibit 4.

However, covered employment does not account for all workers in the economy, notably excluding sole proprietors. An analysis of the data shows that covered employment reported by the Oregon Employment Department for Columbia County represents only about 66% of total employment reported by the U.S. Department of Commerce. This ratio was evaluated for each employment sector in Columbia County and the resulting figures were used to estimate the number of noncovered employees. This approach enabled the calculation of total employment in St. Helens. Exhibit 7 shows St. Helens had an estimated 7,164 total employees within its UGB in 2022.

Exhibit 7. Estimated Total Employment by Sector, St. Helens UGB, 2022

Sector	Covered Employment	Estimated Total Employment	Covered % of Total
Agriculture, Forestry, Fishing and Hunting and Mining	25	38	66%
Construction	113	180	63%
Manufacturing	487	536	91%
Wholesale Trade	85	120	71%
Retail Trade	707	1,035	68%
Transportation and Warehousing	80	151	53%
Information	12	29	42%
Finance and Insurance	148	344	43%
Real Estate and Rental and Leasing	51	471	11%
Prof., Sci., and Tech. Services and Mgmt. of Companies	156	357	44%
Admin. / Support and Waste Mgmt / Remediation Serv.	370	571	65%
Health Care and Social Assistance & Educational Services	839	1,040	81%
Arts, Entertainment, and Recreation	19	85	22%
Accommodation and Food Services	611	682	90%
Other Services (except Public Administration)	179	468	38%
Government	988	1,057	93%
Total	4,870	7,164	68%

Source: 2022 covered employment from confidential Quarterly Census of Employment and Wage (QCEW) provided by the Oregon Employment Department. EConorthwest estimate for total employment.



Employment Projection

The employment forecast covers the 2025 to 2045 period, requiring an estimate of total employment for St. Helens in 2025. The base employment starts with the estimate of 7,164 total jobs in St. Helens in 2022, shown in Exhibit 7.

St. Helens does not have an existing employment forecast, and there is no required method for employment forecasting. OAR 660-024-0040(9)(a) sets out some optional "safe harbors" that allow a city to determine employment land need.

Exhibit 8 shows the forecast rate options, which includes employment growing at the rate of the PSU population growth rate (0.47%), the OED regional employment growth rate (0.89%),¹⁵ or the historic employment growth rate in St. Helens between 2008 and 2022 (0.13%). The PSU and OED growth rates are the safe harbor options in OAR 660-024-0040(9)(a)(A) and OAR 660-024-0040(9)(a)(B).

Exhibit 8. Forecast Rate Options for Employment Growth in St. Helens UGB, 2025–2045

Year	Jobs grow at the rate of...		
	Historic Employment Growth in St.Helens (2008-22) (0.13%)	Population Growth Forecast for the City (2025-45) (0.47%)	Regional Employment Growth (0.89%)
2025	7,192	7,266	7,356
2045	7,382	7,982	8,777
Change 2025 to 2045			
Employees	190	716	1,421
Percent	3%	10%	19%
Rate (AAGR)	0.13%	0.47%	0.89%

Source: EConorthwest

¹⁵ During the EOA process, EConorthwest used the OED forecast rates for the 2022-2032 period.



The City selected the forecast based on the regional employment growth rate (0.89% average annual growth rate), consistent with the safe harbor in OAR 660-024-0040(9)(a). This safe harbor allows the City to assume that the current number of jobs in the St. Helens UGB will grow during the 20-year planning period at a rate equal to the regional employment forecasted growth rate provided in the most recent forecast published by the Oregon Employment Department.¹⁶

Exhibit 9 shows employment growth in St. Helens between 2025 and 2045, based on the assumption that the city will grow at an average annual growth rate of 0.89%. St. Helens will have 8,777 employees within the UGB by 2045, which is an increase of 1,421 employees (19%) between 2025 and 2045.

This forecast assumes that St. Helens' employment will grow faster than employment grew between 2008 and 2022. Factors that may support this faster growth include the City's ongoing investments and expected growth in businesses at the St. Helens Industrial Business Park and the completion of St. Helens' Waterfront Redevelopment Project. Together, these public investments are expected to support growth of manufacturing businesses and commercial businesses.

Exhibit 9. Employment Growth in St. Helens UGB, 2025–2045

Year	Total Employment
2025	7,356
2045	8,777
Change 2025 to 2045	
Employees	1,421
Percent	19%
Rate (AAGR)	0.89%

Source: ECONorthwest

¹⁶ During the EOA process, ECONorthwest used the OED forecast rates for the 2022-2032 period.



Allocate Employment to Different Land Use Types

The next step in forecasting employment is to allocate future employment to broad categories of land use. Firms wanting to expand or locate in St. Helens will look for a variety of site characteristics, depending on the industry and specific circumstances. EConorthwest grouped employment into four broad categories of land use based on the North American Industrial Classification System (NAICS): industrial, retail commercial, office and commercial services, and government.¹⁷

Exhibit 10 shows the expected share of employment by land use type in 2025 and the forecast of employment growth by land use type in 2045 in the St. Helens UGB. The results assume that the share of employment in each category will remain the same.

Exhibit 10. Forecast of Employment Growth by Land Use Type, St. Helens UGB, 2025–2045

Land Use Type	2025		2045		Change 2025 to 2045
	Employment	% of Total	Employment	% of Total	
Industrial	1,052	14%	1,255	14%	203
Retail Commercial	1,063	14%	1,268	14%	205
Office & Commercial Services	4,156	56%	4,959	56%	803
Government	1,085	15%	1,295	15%	210
Total	7,356	100%	8,777	100%	1,421

Source: EConorthwest

Note: The shaded percentages denote an assumption about the future share of employment (as a percent of total) by land use type.

Estimate of Demand for Commercial and Industrial Land

This section shows demand for vacant (including partially vacant) land in St. Helens over the 20-year period. The assumptions used in this analysis are:

- ◆ **Employment density.** Employees per net acre is a measure of employment density based on the ratio of the number of employees per acre of employment land that is developed for employment uses.

Exhibit 11 assumes the following numbers of net employees per acre: industrial will have an average of 8 employees per acre, retail commercial will have an average of 20 employees per acre, and office and commercial services will have an average of 25 employees per acre.¹⁸ These employment densities are consistent with Oregon

¹⁷ Industrial employment includes construction and agriculture; manufacturing; transportation and warehousing; and wholesale trade. Retail commercial is retail trade. Office and commercial includes information; finance and insurance; real estate; professional services; management of companies; administrative support and waste management; educational services; healthcare and social assistance; recreation; accommodation and food services; and other services. Government includes all employment at federal, state, local, and other governmental agencies.

¹⁸ Government employment is not included when discussing employment land demand since growth in government employment does not result directly in need for more land for public uses. For instance, schools require land based on expected growth of students in the school district or replacement of existing schools, rather than as a result of growth in government employment. Local or regional governments may grow and continue to occupy existing built space or may need land based on factors other than employment growth. In



cities similar in size to St. Helens. Some types of employment will have higher employment densities (e.g., a two-story commercial building), and some will have lower employment densities (e.g., a convenience store with a large parking lot).

- ◆ **Conversion from net to gross acres.** The data about employment density is in *net* acres, which does not include land for public right-of-way. Future land need for employment should include land in tax lots needed for employment, plus land needed for public right-of-way. One way to estimate the amount of land needed for employment, including public right-of-way, is to convert from *net* to *gross* acres based on assumptions about the amount of land needed for public right-of-way.¹⁹ A net-to-gross conversion is expressed as a percentage of gross acres that are in public right-of-way.

Based on empirical evaluation of St. Helens' existing net-to-gross ratios in areas designated for and developed with industrial and commercial uses, EConorthwest uses a net-to-gross conversion factor of 15% for industrial land and 27% for commercial land.

Using these assumptions, the forecasted growth of 1,421 new employees will result in the following demand for vacant (and partially vacant) employment land: 29 gross acres of industrial land, 13 gross acres of retail commercial land, and 41 gross acres of office commercial land.

Exhibit II. Demand for Vacant Land to Accommodate Employment Growth, St. Helens UGB, 2025–2044

Land Use Type	New Emp. on Vacant Land	Employees per Net Acre	Land Demand (Net Acres)	Land Demand (Gross Acres)
Industrial	203	8	25	29
Retail Commercial	205	20	10	13
Office & Commercial Services	803	25	32	41
Total	1,211	-	68	83

Source: EConorthwest

addition, government employment locates in a range of zones, including commercial, residential, public, and other zones.

¹⁹ OAR 660-024-0010(6) uses the following definition of net buildable acre. "Net Buildable Acre" consists of 43,560 square feet of residentially designated buildable land after excluding future rights-of-way for streets and roads. While the administrative rule does not include a definition of a gross buildable acre, using the definition above, a gross buildable acre will include areas used for rights-of-way for streets and roads. Areas used for rights-of-way are considered unbuildable.



Target Industries

The characteristics of St. Helens will affect the types of businesses most likely to locate in the city. Attributes that may attract firms are St. Helens' location along the Columbia River, access to a skilled and educated workforce, available industrial land, quality of life, and tourism.

St. Helens' existing businesses are concentrated in the industries defined in Exhibit 12. The industries in **green highlight** are industries with higher-than-average city wages. Industries with a high location quotient (i.e., highly specialized compared to national employment in the industry), high employment (i.e., have more than 50 employees in St. Helens), and higher-than-average city wages have the highest potential for growth. St. Helens also has opportunities for employment growth in industries without a concentration of employment or a high location quotient.

Exhibit 12. Concentration of Industries and Employment, St. Helens, 2022

	High Employment (50 employees or more)	Low Employment (at least 10 employees)
High Location Quotient	<ul style="list-style-type: none"> ▪ Paper Manufacturing ▪ Fabricated Metal Product Manufacturing ▪ Plastics and Rubber Products Manufacturing ▪ Religious, Grantmaking, Civic, Professional, and Similar Organizations ▪ Food and Beverage Stores ▪ Motor Vehicle and Parts Dealers ▪ Nursing and Residential Care Facilities ▪ Social Assistance ▪ Ambulatory Healthcare Services ▪ Food Services and Drinking Places 	<ul style="list-style-type: none"> ▪ Mining (except Oil and Gas) ▪ Chemical Manufacturing ▪ Waste Management and Remediation Services ▪ Transit and Ground Passenger Transportation
Low Location Quotient	<ul style="list-style-type: none"> ▪ Administrative Support Services ▪ Professional, Scientific, and Technical Services ▪ Credit Intermediation and Related Activities ▪ Specialty Trade Contractors ▪ Merchant Wholesalers, Durable Goods ▪ Truck Transportation 	<ul style="list-style-type: none"> ▪ Insurance Carriers and Related Activities ▪ Real Estate ▪ Accommodation ▪ Building Material and Garden Equipment and Supplies Dealers ▪ Repair and Maintenance ▪ Personal and Laundry Services ▪ Management of Companies and Enterprises ▪ Construction of Buildings ▪ Merchant Wholesalers, Nondurable Goods ▪ Amusement, Gambling, and Recreation Industries ▪ Crop Production ▪ Securities, Commodity Contracts, and Other Financial Investments ▪ Beverage and Tobacco Manufacturing

Source: Oregon Employment Department, Quarterly Census of Employment and Wages, 2022.

Note: Green highlighting indicates higher than St. Helens' average wage.



Potential Growth Industries

An analysis of potential growth industries in St. Helens should address two main questions: (1) Which industries are most likely to be attracted to St. Helens? (2) Which industries best meet St. Helens' economic development goals? The selection of potential growth industries is based on St. Helens' goals for economic development, economic conditions in St. Helens and Columbia County, and the city's competitive advantages.

Given the current employment base, which is composed of primarily small-sized businesses, it is reasonable to assume that much of the city's business growth will come from small-sized businesses, with the potential for attracting a few larger businesses. This growth will either come from businesses already in St. Helens or new businesses that start in or relocate to St. Helens. As St. Helens encourages business growth, the City should consider how industries support its goals for higher-wage jobs. The industries identified as having potential for growth in St. Helens are:

- ◆ **Manufacturing.** St. Helens has ample industrial land, including the 204-acre city-owned St. Helens Industrial Business Park. Its proximity to the deepwater Port of Columbia County provides a significant advantage for manufacturers looking to efficiently ship their goods. The city's location near the Oregon Manufacturing Innovation Center (OMIC) and the Portland Community College in Scappoose offers additional advantages, attracting businesses who may want to locate near its training and research opportunities. As automation reshapes the industry, St. Helens is poised to adapt, with potential growth in sectors like paper manufacturing, plastics and rubber products, and fabricated metal products, which are already established in the area. The region also has the potential to expand into the food and beverage manufacturing sector, recognized as a growth area by the state, due to its robust water and sewer infrastructure. The training center at Portland Community College—specializing in mechatronics, welding, and machining—supports the ongoing evolution in manufacturing, ensuring the workforce is equipped to meet the demands of modern manufacturing technologies.
- ◆ **Trades.** Construction and other trades are in high demand in St. Helens and surrounding communities. Large infrastructure projects across Columbia County, like the NEXT Renewable Fuels, Inc. project,²⁰ will further drive the demand for skilled tradespeople. The technical programs at St. Helens High School should help produce a steady pipeline of skilled workers who may choose to base themselves in St. Helens.
- ◆ **Healthcare like nursing and residential care facilities.** St. Helens has an existing concentration of healthcare and social services. As the population grows and ages in St. Helens and surrounding areas, the demand for these services, particularly in nursing and residential care facilities, is expected to increase.
- ◆ **Tourism.** St. Helens is on the Columbia River and has access to parks and other outdoor recreational opportunities. The city is renowned for hosting the Spirit of Halloweentown, a monthlong festival that draws thousands of visitors annually. These visitors boost demand for local services such as hotels, restaurants, retail, and other

²⁰ <https://nextrenewables.com/#about-the-next-project>



experiences. Additionally, the Riverfront Redevelopment property is set to support mixed-use development, with the city interested in attracting a development partner who could bring a boutique hotel to the area.

- ◆ **Services for residents.** As St. Helens grows, demand for services for residents will grow. These services include retail, restaurants, medical services, childcare services, personal services, and other services. These types of services present opportunities for entrepreneurship and small business development in St. Helens.

Site Needs for Potential Growth Industries

OAR 660-009-0015(2) requires the EOA to "identify the number of sites by type reasonably expected to be needed to accommodate the expected [20-year] employment growth based on the site characteristics typical of expected uses." The Goal 9 rule does not specify how jurisdictions conduct and organize this analysis.

OAR 660-009-0015(2) does state that "industrial or other employment uses with compatible site characteristics may be grouped together into common site categories." The rule suggests, but does not require, that the City "examine existing firms in the planning area to identify the types of sites that may be needed." For example, site types can be described by (1) plan designation (e.g., heavy or light industrial), (2) general size categories that are defined locally (e.g., small, medium, or large sites), or (3) industry or use (e.g., manufacturing sites or distribution sites). For purposes of the EOA, St. Helens groups its future employment uses into categories based on their need for land with a particular plan designation (i.e., industrial or commercial) and by their need for sites of a particular size.

The potential growth industries described in the prior section are a mixture of business sizes, which will require a mixture of site sizes. Exhibit 13 shows the typical site needs for manufacturing businesses in Oregon.



Exhibit 13. Industrial Development Competitiveness Matrix, Business Oregon

Industry Sector	Site size (Acres)	Site Topography (Slope)	Trip Generation (ADT/Acre)	Site Access Max distance in miles to interstate or major arterial	Railroad or Port Access	Telecommunications (major communications dependency)
Regionally to Nationally Scaled Clean-Tech Manufacturer	5-100+	0-5%	40 - 60	10	Preferred	Required
Heavy Industrial/ Manufacturing	10-100+	0-5%	40 - 60	10	Preferred	Preferred
General Manufacturing	5-15+	0-5%	40 - 50	20	Preferred	Required
Food Processing	5-25+	0-5%	50 - 60	30	Preferred	Preferred
Regional (multistate) Distribution Center	20-100+	0-5%	40 - 80	5 Only Interstate highway or equivalent	Preferred	Preferred
Warehouse/ Distribution (local)	10-25	0-5%	40 - 80	5 Only Interstate highway or equivalent	Preferred	Preferred
Call Center / Business Services	5-15	0 to 12%	170 - 180	Not applicable	Preferred	Required
Advanced Manufacturing & Assembly	5-25+	0-7%	40 - 60	15	Not Required	Required
Business Park and R&D Campus	20 - 100+	0-7%	60 to 150	N/A	Preferred	Required
UVA Manufacturing / Research	10-25+	0-7%	40 - 80	N/A	Not Required	Required
Data Center	10-25+	0-7%	20 - 30	30	Avoid / Not Required	Required
Rural Industrial	5-25+	0-5%	40 - 50	N/A	N/A	Preferred

Source: Business Oregon, Infrastructure Finance Authority, "Industrial Development Competitiveness Matrix." Note: Items identified as "preferred" are those that increase the feasibility of the subject property and its future reuse. Items identified as "required" are factors seen as mandatory in a majority of cases and have become industry standards.



For the most part, the size of sites needed by most potential growth industries will range from space in an existing building, to sites with minimal topographic constraints of one acre or less, to sites of 25 acres for manufacturing businesses. In a few instances, such as in industrial or business parks, sites larger than 25 acres may be necessary to meet the needs of businesses or developments to support businesses. Manufacturing and other industrial businesses likely to locate in St. Helens will have a range of space needs, ranging from:

- ◆ **Space in an existing building.** Most businesses that work with Business Oregon on site selection request space in existing buildings, either in vacant buildings or in buildings with other manufacturers.
- ◆ **Small-scale manufacturing space.** Businesses would be in an industrial building with many other users. These businesses will need direct access to arterial streets and highways. This type of space could be used to establish a business incubator or shared workspace for growing and supporting businesses.
- ◆ **Small manufacturing site.** Some manufacturers may want to develop a building on a small site, such as a site 1 to 5 acres in size. These businesses will need easy access to arterial streets and may prefer to locate near other manufacturers.
- ◆ **Midsized manufacturing site.** Some midsized manufacturers may prefer to locate in a building with one or two other businesses. Other manufacturers may prefer to locate in newly developed buildings on sites from five to 15 acres in size. These businesses will need direct access to arterial streets and highways and may need greater access to water and wastewater.
- ◆ **Large manufacturing site.** Some larger manufacturers may prefer newly developed buildings on sites larger than 15 acres, often in buildings specifically built by the company who will occupy the building. These businesses will need direct access to arterial streets and highways and may need greater access to water and wastewater.

Commercial businesses, including service and hospitality, require high-visibility locations near other businesses and neighborhoods. Professional and commercial service businesses have a variety of space needs, ranging from:

- ◆ **Space in an existing building.** Businesses would be located as one of many firms within the building.
- ◆ **Space in a building dominated by one firm.** This could potentially be with manufacturing or other industrial space in the building.
- ◆ **Land for a hotel.** The City's goal is to attract a hotel to the waterfront area, which will require a site of at least 3 to 5 acres.
- ◆ **Land for construction of a building designed for the firm.** Some firms will need a custom-built building. In this case, the firm will likely need land ranging from 1 to 5 acres in size.



4. Buildable Lands Inventory

The buildable lands inventory (BLI) is intended to identify commercial and industrial lands that are available for development for employment uses within the St. Helens urban growth boundary (UGB). The inventory is sometimes characterized as *supply* of land to accommodate anticipated employment growth. Population and employment growth drive *demand* for land. The amount of land needed depends on the type of development and other factors.

This chapter presents results of the commercial and industrial buildable lands inventory for the St. Helens UGB. The results are based on analyses of the City of St. Helens, Columbia County, and State of Oregon GIS data by ECONorthwest and were reviewed by City staff. The remainder of this chapter summarizes key findings of the BLI.

The general steps in the buildable lands inventory are:

1. Generate UGB "land base"
2. Classify lands by buildable area status
3. Identify constraints
4. Verify inventory results
5. Tabulate and map results

The following chapter provides a summary of the results of the commercial and industrial buildable lands inventory for the St. Helens UGB in both tabular and map formats. **Appendix B presents more details on the methodology for developing the inventory.**



Land Base

The land base for the St. Helens' Buildable Lands Inventory includes all tax lots in the urban growth boundary within plan designations that allow for employment. Exhibit 14 shows the land base by plan designation in the UGB.

Exhibit 14. Employment Land Base by Plan Designation, St. Helens UGB, 2024

Plan Designation	Number of Tax Lots	Percent	Total Tax Lot Acreage	Percent (Total Acreage)
Incorporated	752	88%	1,242	89%
General Commercial (GC)	491	58%	212	15%
Highway Commercial (HC)	110	13%	68	5%
Light Industrial (LI)	65	8%	116	8%
Heavy Industrial (HI)	86	10%	846	61%
Unincorporated	100	12%	149	11%
Unincorporated General Commercial (UGC)	4	0.5%	23	2%
Unincorporated Highway Commercial (UHC)	32	4%	28	2%
Unincorporated Light Industrial (ULI)	30	4%	40	3%
Unincorporated Heavy Industrial (UHI)	34	4%	57	4%
Total	852	100%	1,391	100%

Source: EConorthwest analysis, City of St. Helens, Columbia County

Note: The number of tax lots represented is greater than the actual total number of tax lots in the analysis due to split plan designations.



Buildable Area Status

Exhibit 15 shows the total acres of commercial and industrial tax lots classified by buildable area status. ECONorthwest used a rule-based classification (described in Appendix B) to define an initial status classification. These classifications were then confirmed through a series of reviews by ECONorthwest and City staff, based on local knowledge and review of aerial maps.

Exhibit 15. Employment Acres by Classification and Plan Designation, St. Helens UGB, 2024

Plan Designation	Total Acres	Committed Acres	Constrained Acres	Buildable Acres
Incorporated	1,242	418	544	280
General Commercial (GC)	212	122	48	42
Highway Commercial (HC)	68	49	9	10
Light Industrial (LI)	116	52	18	46
Heavy Industrial (HI)	846	195	469	181
Unincorporated	149	78	48	22
Unincorporated General Commercial (UGC)	23	10	13	-
Unincorporated Highway Commercial (UHC)	28	20	2	6
Unincorporated Light Industrial (ULI)	40	28	8	5
Unincorporated Heavy Industrial (UHI)	57	21	25	11
Total	1,391	497	592	302

Source: ECONorthwest analysis, City of St. Helens, Columbia County

Development Constraints

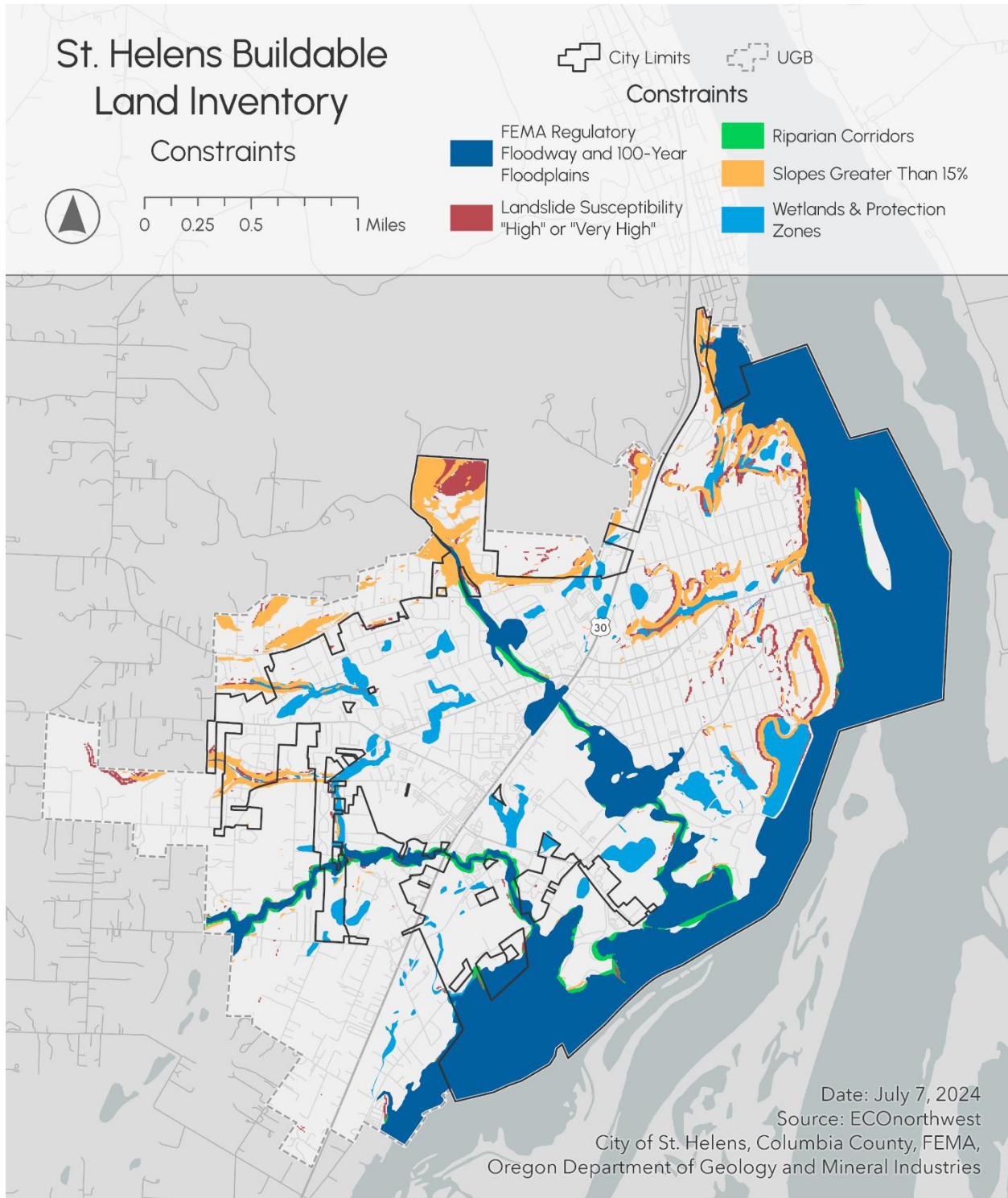
The buildable lands inventory identifies the following conditions as constraints that prohibit development. These constraints are also shown on Exhibit 16:

- ◆ FEMA 100-Year Floodplains and Regulatory Floodway
- ◆ High or very high landslide susceptibility
- ◆ Slopes greater than 15%
- ◆ City-identified and locally significant wetlands
- ◆ Riparian corridors and wetland protection zones up to 75 feet from the top of waterbody banks.

Exhibit 17 shows buildable area status with constraints applied, resulting in buildable acres. Vacant or partially vacant land with these constraints is considered unavailable for development and was removed from the inventory of buildable land. Note that tax lots shown as partially vacant do not distinguish the portion of the tax lot that is unavailable for development. The buildable lands inventory database accounts for this part of the tax lot that is developed (and considered unavailable for future development).



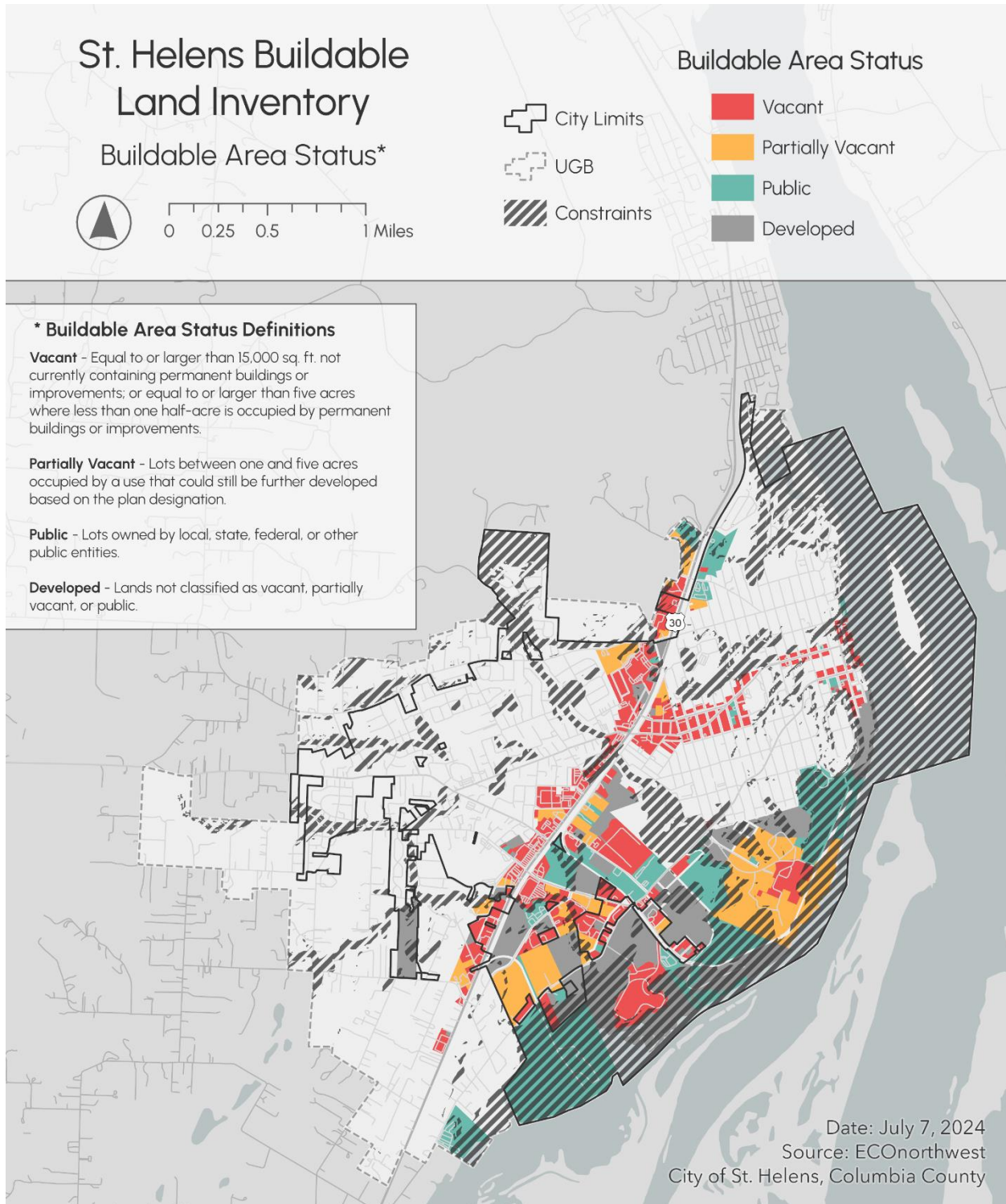
Exhibit 16. Development Constraints, St. Helens UGB, 2024



Source: EConorthwest analysis, City of St. Helens, Columbia County



Exhibit 17. Buildable Area Status with Constraints, St. Helens UGB, 2024



Source: ECONorthwest analysis, City of St. Helens, Columbia County



Vacant Buildable Land

The next step in the commercial and industrial buildable lands inventory was to net out portions of vacant and partially vacant tax lots that are unsuitable for development. Areas unsuitable for development fall into two categories: (1) developed areas of partially vacant tax lots, and (2) areas with physical constraints (i.e., areas within wetlands, floodplains, steep slopes).

Exhibit 18 shows buildable acres (i.e., acres in tax lots after constraints are deducted) for vacant and partially vacant land by plan designation. Exhibit 19 shows St. Helens' buildable vacant and partially vacant commercial and industrial land by plan designation

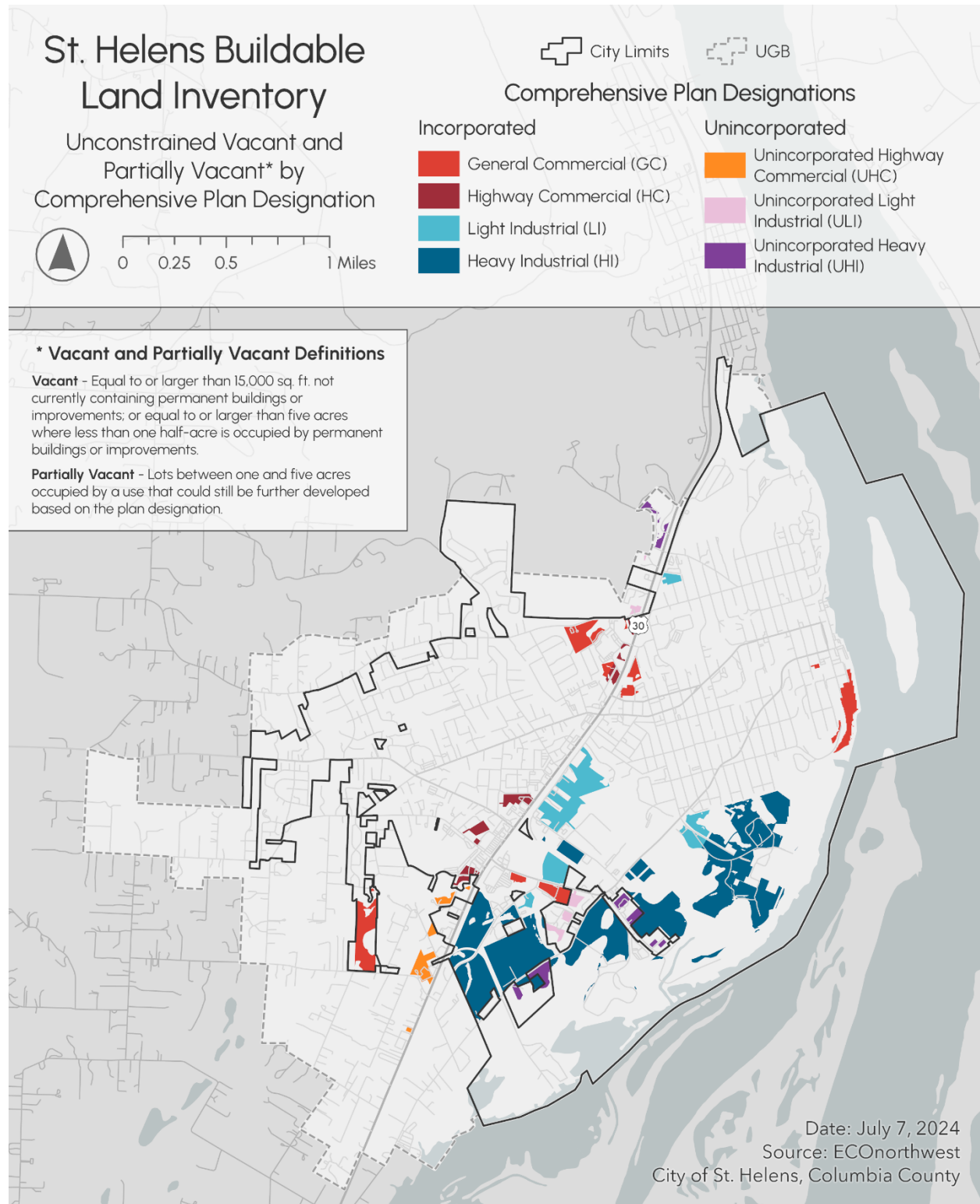
Exhibit 18. Buildable Acres in Vacant/Partially Vacant Tax Lots by Plan Designations, St. Helens UGB, 2024

Plan Designation	Total Buildable Acres	Buildable Acres on Vacant Lots	Buildable Acres on Partially Vacant Lots
Incorporated	280	194	86
General Commercial (GC)	42	30	13
Highway Commercial (HC)	10	8	2
Light Industrial (LI)	46	37	9
Heavy Industrial (HI)	181	119	62
Unincorporated	22	12	11
Unincorporated Highway Commercial (UHC)	6	2	4
Unincorporated Light Industrial (ULI)	5	1	4
Unincorporated Heavy Industrial (UHI)	11	8	3
Total	302	206	96

Source: ECONorthwest analysis, City of St. Helens, Columbia County



Exhibit 19. Buildable Employment Land by Plan Designation, St. Helens UGB, 2024



Source: EConorthwest analysis, City of St. Helens, Columbia County



Exhibit 20 shows the size of lots by plan designations for buildable employment land. St. Helens has 24 lots that are smaller than 0.5 acres (with 8 acres of land); 47 lots between 0.5 and 2 acres (53 acres of land); 20 lots between 2 and 5 acres in size (61 acres of land); 6 lots between 5 and 10 acres in size (41 acres of land); 7 lots between 10 and 25 acres in size (109 acres of land); and 1 lot between 25 and 50 acres in size (30 acres of land).

Exhibit 20. Tax Lot Size by Plan Designation, Buildable Acres, St. Helens UGB, 2024

Plan Designation	Buildable Sites Size							Total
	0 - 0.5 Acres	0.5 - 1 Acres	1 - 2 Acres	2 - 5 Acres	5 - 10 Acres	10 - 25 Acres	25 - 50 Acres	
Incorporated	6	11	29	53	41	109	30	280
General Commercial (GC)	2	1	5	12	-	23	-	42
Highway Commercial (HC)	2	2	3	3	-	-	-	10
Light Industrial (LI)	1	3	5	15	21	-	-	46
Heavy Industrial (HI)	2	4	15	24	20	86	30	181
Unincorporated	2	3	10	8	-	-	-	22
Unincorporated Highway Commercial (UHC)	1	2	3	-	-	-	-	6
Unincorporated Light Industrial (ULI)	0.1	1	4	-	-	-	-	5
Unincorporated Heavy Industrial (UHI)	1	-	3	8	-	-	-	11
Acreage Total	8	14	39	61	41	109	30	302
Incorporated	19	15	21	17	6	7	1	86
General Commercial (GC)	5	2	4	3	-	2	-	16
Highway Commercial (HC)	4	3	3	1	-	-	-	11
Light Industrial (LI)	2	4	4	4	3	-	-	17
Heavy Industrial (HI)	8	6	10	9	3	5	1	42
Unincorporated	5	4	7	3	-	-	-	19
Unincorporated Highway Commercial (UHC)	2	3	2	-	-	-	-	7
Unincorporated Light Industrial (ULI)	1.0	1	3	-	-	-	-	5
Unincorporated Heavy Industrial (UHI)	2	-	2	3	-	-	-	7
Tax Lot Total	24	19	28	20	6	7	1	105

Source: EConorthwest analysis, City of St. Helens, Columbia County



5. Land Sufficiency and Conclusions

This chapter presents conclusions about St. Helens' employment land sufficiency for the 2025–2045 period, as well as recommendations for the City to consider for meeting its economic growth needs throughout the planning period.

Land Sufficiency

Exhibit 21 shows commercial and industrial land sufficiency within the St. Helens UGB. It shows:

- ◆ **Vacant unconstrained land within the UGB.** This land is identified and discussed in detail in the Vacant Buildable Land section of this report. Utilizing data from that section, Exhibit 21 shows that St. Helens has 244 gross acres of industrial land and 58 gross acres of commercial land.
- ◆ **Demand for commercial and industrial land.** The Estimate of Demand for Commercial and Industrial Land section of this report describes the methodology used to identify demand. Based on assumptions described in that section, St. Helens will need a total of 29 gross acres for industrial uses and 54 gross acres for commercial uses over the 2025-2045 period (Exhibit 11).
- ◆ **Land sufficiency.** When subtracting the demand for land from the supply of vacant unconstrained land, Exhibit 21 shows that St. Helens has:
 - A 214-acre surplus of industrial land
 - A 4-acre surplus of commercial land.

Exhibit 21. Comparison of the Capacity of Unconstrained Vacant Land with Employment Land Demand by Land Use Type, St. Helens UGB, 2025–2045

General Plan Designation	Land Supply (Gross Acres)	Land Demand (Gross Acres)	Land Sufficiency (Gross Acres)
Industrial	244	29	214
Commercial	58	54	4

Source: EConorthwest



The target industries identified are a combination of manufacturing and industrial businesses and retail and commercial services for residents and visitors (see Potential Growth Industries). The site needs generally show that these businesses in St. Helens will need sites that range from space in an existing building, to sites with minimal topographic constraints of one acre or less, to sites of 25 acres for manufacturing businesses. In a few instances, sites larger than 25 acres may be necessary (see Site Needs for Potential Growth Industries).

Exhibit 20 shows that St. Helens has 13 sites that range from 5 to 25 acres. Two of these sites are designated commercial, and 11 sites are designated industrial. St. Helens has 1 site (30 acres) that is between 25 and 50 acres in size within the industrial designation. Some businesses will need sites smaller than 5 acres for development. St. Helens has 91 sites smaller than 5 acres. In addition, development of sites larger than 5 acres is likely to result in the division of land into smaller sites.

Based on this information and the analysis in Exhibit 21, St. Helens has sufficient land within its UGB to support the projected industrial and commercial growth. However, while there is a limited surplus of land for commercial development, the city has a substantial surplus of industrial land, much of which is zoned for Heavy Industrial.

Conclusions

- ◆ **St. Helens is forecasted to grow in both the commercial and industrial employment sectors.** St. Helens is planning for growth of 1,421 new jobs in the city over the 2025 to 2045 period. About 203 of the jobs will be industrial, 803 of the jobs will be in office and commercial services, and 205 in retail. Growth of these jobs will result in demand for about 29 gross acres of industrial land and 54 gross acres of commercial land.
- ◆ **St. Helens has a surplus of land to accommodate industrial employment growth.** Exhibit 21 shows that St. Helens has enough land for industrial employment growth over the next 20 years, with a surplus of 214 acres. For its target industries, St. Helens will have need for industrial sites ranging from space in existing buildings to sites ranging from 5 to 25 acres for small and mid-sized manufacturing and other industrial businesses. The City owns the St. Helens Industrial Business Park and is using this land to attract new manufacturing businesses to St. Helens.
- ◆ **For commercial growth, however, the land surplus is much smaller.** Exhibit 21 shows that while there is enough land for commercial employment growth, the surplus is only 4 acres. St. Helens will need commercial sites ranging from existing building spaces to parcels between 1 and 5 acres. The city may also require a larger commercial site to attract a hotel. In addition, it is probable that some commercial land will be used for housing development, either as part of a mixed-use building or as a stand-alone affordable housing development. To address the limited surplus, the City could explore two strategies: strategically rezoning select industrial parcels for commercial use to better align with future demand or evaluating whether certain commercial uses could be integrated into industrial land. If retaining industrial land aligns with broader City goals, those priorities may outweigh rezoning considerations.



- ◆ **St. Helens' wages are lower than the regional average.** St. Helens' average wage of \$46,490 is lower than the average of \$51,135 for Columbia County. St. Helens' potential growth industries generally have above-average wages, except for certain types of services for residents and visitors, such as retail, food services, and accommodation.

Recommended Actions

Based on the analysis and conclusions in this report, ECONorthwest recommends that the City of St. Helens **update the economic section of its Comprehensive Plan**. This section has not undergone a comprehensive update in over a decade. The new information provided in the EOA offers an updated fact base to guide future decision-making. ECONorthwest also recommends that the City **develop an action plan to implement its economic development goals and policies**.

Draft economic development goals, policies, and corresponding actions to support implementation are provided below for the City's consideration.

GOAL A: ENCOURAGE THE GROWTH OF A HEALTHY, STABLE, AND DIVERSIFIED ECONOMIC BASE FOR COMMERCIAL AND INDUSTRIAL BUSINESSES

Policies

- ◆ Support the growth, development, and retention of a diverse mix of industries that complement existing strengths and assets in the community, reducing reliance on any single sector.
- ◆ Attract businesses offering jobs that pay higher than Columbia County's average wage, to provide opportunities for people to live and work in St. Helens, focusing on industries such as manufacturing, healthcare, and high-tech.
- ◆ Coordinate economic development efforts with other jurisdictions and agencies such as the St. Helens Main Street Alliance, Columbia Economic Team, Small Business Development Center, and Port of Columbia County to identify and support the expansion of existing industries and attraction of new industries to the community.
- ◆ Foster entrepreneurship, new business creation, and expansion of existing businesses through strengthened partnerships and coordinated economic development efforts.
- ◆ Enhance the diversity of goods and services available to residents by attracting and supporting a wide range of enterprises, including but not limited to remote workers.
- ◆ Prioritize the attraction and growth of businesses that use less energy, focusing on sectors that promote energy efficiency and sustainability.
- ◆ Ensure adequate economic development staffing to implement economic development policy.
- ◆ Ensure adequate development review staffing such as those in Planning, Building and Engineering divisions to maximize responsiveness and optimum customer service for development proposals.



Actions

- ◆ Hire a community development specialist to improve coordination with organizations and businesses to make St. Helens a more business-friendly city. This role would supplement current staff by handling tasks they lack the time or expertise to advance. The specialist would collaborate with organizations like the Columbia Economic Team, Small Business Development Center, and Growing Rural Oregon (GRO) Greater, serving as a liaison between City staff, these organizations, and businesses. The focus of this position will be on enhancing coordination with existing economic development efforts, not replacing them. Key responsibilities would include streamlining city functions, simplifying the development and permitting process, helping businesses understand the development and permitting process, and assessing why businesses fail. The City may be able to use Urban Renewal funds to partially fund this position as long as the position supports implementation of Urban Renewal priorities. Given budget constraints, it is possible this would be a component of a new position, rather than a specialist employee that only focuses on this issue.
- ◆ Ensure that any employee/staffing study for the city includes economic development staffing considerations and adequate staffing for the Planning, Building and Engineering divisions.
- ◆ Increase communication with and support for businesses, such as by proactively communicating about construction impacts such as road closures and help with navigating the development and permitting process.
- ◆ Develop a business growth and attraction strategy to attract identified target industries and other businesses that St. Helens lacks (such as more healthcare services) to ensure that there are goods, services, and other amenities to serve businesses and residents.
- ◆ Develop programs to attract businesses in identified target industries, considering tax incentives, land use controls, and capital improvement programming. Consider targeting incentives in Urban Renewal Areas.
- ◆ Create a "How to Do Business in St. Helens" packet, outlining general timelines and expectations. Coordinate with the Small Business Development Center to include relevant resources.
- ◆ Streamline development processes for commercial and industrial lands.
- ◆ Develop a checklist outlining the steps a developer must follow to navigate the development process.



GOAL B: ENSURE THAT ST. HELENS HAS SUFFICIENT LAND AND INFRASTRUCTURE CAPACITY TO SUPPORT A DIVERSE RANGE OF EMPLOYMENT OPPORTUNITIES

Policies

- ◆ Ensure that St. Helens has enough land zoned to provide industrial and commercial opportunities, periodically monitoring land development and updating the land use map to ensure that there is enough land in each designation to accommodate expected growth. Encourage land uses that are compatible with existing and planned transportation infrastructure, ensuring compatibility with residential uses.
- ◆ Coordinate capital improvement planning with economic development planning to ensure infrastructure availability to employment lands.
- ◆ Partner with providers of infrastructure not provided by the City, such as electricity, natural gas, and high-speed internet, to ensure service is available when needed.
- ◆ Collaborate with the Port of Columbia County to prioritize strategic infrastructure development that activates Port-owned properties in St. Helens
- ◆ Support the cleanup and remediation of key distressed properties and brownfields in St. Helens.

Actions

- ◆ Partner with Columbia River People's Utility District (CRPUD) to increase access to electrical power throughout the City.
- ◆ Partner with Portland General Electric, which supplies power exclusively to a majority of the St. Helens Industrial Business Park.
- ◆ Continue to work with state partners and electrical companies to increase access to electrical power to St. Helens and other communities in the state.
- ◆ Continue to support regional and local internet feasibility studies and future implementation of regional high-speed internet.
- ◆ Monitor development in commercial and industrial areas. As development or rezoning occurs, evaluate whether the city continues to have enough commercial and industrial land as defined in the most recent adopted Economic Opportunity Analysis to support employment growth.
- ◆ Coordinate capital improvement planning with the City's Public Works Department to ensure infrastructure availability on employment land and continue to pursue funding for needed infrastructure to support economic development activities.
- ◆ Conduct a code audit to ensure that zoning regulations are aligned with the City's goals and policies. As a part of the code audit, conduct a review of the Light Industrial zone to determine whether and what types of commercial uses could be appropriately accommodated. This review should assess compatible commercial uses, their potential impacts on industrial activities, and their consistency with the City's objectives. Consider tools such as overlay zones, adjustments to



permitted uses, or other mechanisms to support targeted commercial activity while maintaining the primary function of industrial land.

- ◆ As part of the code audit, identify barriers to development of healthcare and education facilities, such as the uses allowed in St. Helens commercial and industrial zones.

GOAL C: RETAIN AND ATTRACT INDUSTRIAL DEVELOPMENT THAT DIVERSIFIES ST. HELENS' ECONOMIC BASE, SUPPORTS HIGHER-THAN-COUNTY-AVERAGE-WAGE JOB CREATION AND PROVIDES A BALANCED TAX BASE

Policies

- ◆ Encourage the redevelopment and repurposing of former industrial sites.
- ◆ Discourage the leapfrog development of industrial lands, unless there is a program to provide sewer and water to intervening properties.
- ◆ Preserve prime industrial land while considering opportunities for rezoning non-prime industrial areas along key commercial corridors.
- ◆ Work with applicable agencies at the state and federal levels in enacting controls and performance standards for industrial operators to reduce the possibility of adverse impacts on the environment.

Actions

- ◆ Define "prime industrial lands,"²¹ identify those lands in St. Helens, and preserve them for industrial uses.
- ◆ Conduct a market study to identify key opportunities to rezone non-prime heavy or light industrial land to commercial land to ensure that St. Helens has enough commercial land to support growth.
- ◆ Determine if there is need to rezone heavy industrial land to light industrial to provide more flexibility for future uses.
- ◆ Prepare the St. Helens Industrial Business Park site for redevelopment, including acquiring funding for necessary infrastructure improvements.
- ◆ Work with the Port of Columbia County, Columbia Economic Team, and other partners to coordinate regional efforts around recruitment and strategies surrounding economic incentives.
- ◆ Work with the Port of Columbia County, Columbia Economic Team, and other partners to promote St. Helens as a prime business location. Highlight key advantages, such as

²¹ OAR 660-009 defines prime industrial land as: "... 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."



access to ample water supply, strong public safety supported by a local police force, and other benefits.

- ◆ Partner with Oregon Manufacturing Innovation Center (OMIC) and OMIC R&D in Scappoose for potential industrial businesses that may locate in St. Helens, and workforce training opportunities.

GOAL D: FOSTER SMALL BUSINESS GROWTH AND ENTREPRENEURSHIP

Policies

- ◆ Support the retention, growth and expansion of local small businesses.
- ◆ Encourage entrepreneurship and innovation in the community.

Actions

- ◆ Partner with organizations like Growing Rural Oregon (GRO) Greater, Main Street Alliance, the South Columbia County Chamber of Commerce, Columbia Economic Team, and the Small Business Development Center to provide resources and support for local entrepreneurs.
- ◆ Work with partners to support the creation of a business incubator or co-working space to support start-ups and small businesses.
- ◆ As staff capacity allows, develop a work plan for business outreach to understand unmet workforce needs and identify opportunities for workforce development to meet those needs. The outreach plan should focus either on a location for outreach each year (e.g., downtown) or should be sector focused (e.g., manufacturing or downtown commercial). Set a goal of number of businesses to reach out to each year and topics to discuss.
- ◆ Develop a strategy and materials about the ways that the City can help businesses, focusing on the value the City can provide to support businesses in St. Helens. These materials could be used on the City's webpage and in presentations to businesses about economic development.
- ◆ Explore opportunities with partner organizations to incentivize property owners to invest in their properties and encourage them to lease them.
- ◆ Continue to coordinate and partner with organizations that provide k-12 education and workforce development.

GOAL E: FOSTER VIBRANT COMMERCIAL ZONES WITH A MIX OF RETAIL AND SERVICE OPTIONS THAT SERVE THE NEEDS OF RESIDENTS AND ENHANCE DESTINATION APPEAL

Policies

- ◆ Make commercial designation large enough to accommodate a large variety of commercial development with sufficient buffers. Encourage a variety of retail shopping



activities to concentrate in core commercial areas to enhance their attractiveness for a broad range of shoppers.

- ◆ Encourage in-filling of vacant lands within commercial areas.
- ◆ Prioritize the development of the Riverfront District as a key commercial and tourism hub.
- ◆ Support the revitalization of the Houlton Business District.
- ◆ Improve connections and encourage development to better connect the Riverfront and Houlton Business Districts.
- ◆ Enhance the aesthetic appeal, functionality, and economic vitality of key commercial corridors and districts through strategic public infrastructure investments and design standards.
- ◆ Support retail businesses that encourage foot traffic in the Riverfront District.

Actions

- ◆ Continue to implement the US 30 and Columbia Boulevard/St. Helens Street Corridor Master Plan and Riverfront Connector Plan to enhance and better connect the Riverfront and Houlton Business Districts through improved transportation links and wayfinding.
- ◆ Work with mapping services (e.g., Google Maps) to ensure proper routing through the Houlton Business District rather than the industrial area.
- ◆ Develop and implement public facility designs and development standards to revitalize businesses and business districts in the US 30 and Columbia Boulevard/St. Helens Street Corridor Master Plan area.
- ◆ Create gateways and improve access and wayfinding signage to the Houlton Business and Riverfront Districts.
- ◆ Improve the appearance, attractiveness, and safety of the Houlton Business District and Riverfront District through an enhanced street design that includes street trees, landscaping, and more public spaces and pedestrian amenities. Explore opportunities for rezoning industrial land along key corridors where some conversions have already occurred, while preserving prime industrial land.
- ◆ Consider long-term rezoning options for the oversized wastewater treatment plant area to expand the Riverfront District. This is based on potential reduction of the wastewater lagoon size of relocation of the plant.
- ◆ As funding or resources are available, develop a parking management strategy for the Riverfront District using assistance from the Transportation Growth Management Program (a Joint Program of DLCD and ODOT).



GOAL F: ENHANCE TOURISM AS A KEY ECONOMIC DRIVER

Policies

- ◆ Promote year-round tourism opportunities to extend beyond the popular Halloween season, through partnerships, development of infrastructure, and leveraging assets. Recognize and capitalize on the historical nature of St. Helens.
- ◆ Ensure Transient Lodging Tax spending aligns with the City's broader economic development and tourism goals.
- ◆ Integrate recreational opportunities into the Riverfront District, creating public spaces that promote access to and enjoyment of the Columbia River.

Actions

- ◆ Work with tourism consultant to develop a comprehensive tourism strategy that includes events and attractions for all seasons (beyond Halloweentown) building on St. Helens' unique history, supported by a marketing campaign to promote St. Helens as a year-round destination.
- ◆ Partner and coordinate with organizations such as Columbia Economic Team, the Main Street Alliance, and the Columbia County Museum Association to develop a Heritage Tourism strategy, with attention planning celebrations of historical milestones in St. Helens' history.
- ◆ Develop a plan for the allocation of Transient Lodging Tax (TLT) revenues, prioritizing initiatives that drive year-round tourism.
- ◆ Explore opportunities to leverage TLT funds to attract matching grants or private investment in tourism-related infrastructure and marketing efforts.
- ◆ Partner with the Columbia Economic Team (as the Destination Management Organization) to tap into tourism funding from agencies like Travel Oregon
- ◆ Partner with developer of a boutique hotel on City owned riverfront site and identify other opportunities for development of additional hotels.
- ◆ Explore the potential for St. Helens to become a destination for small ships such as local dinner cruises.
- ◆ Expand tourism opportunities for all seasons through initiatives such as:
 - Creating a farmers' market
 - Growing the summer concert series
 - Developing water taxi service
- ◆ Investigate opportunities to grow sports fishing, kayaking, windsurfing activities, and other water-based activities, including the development of necessary onshore and in-water amenities.
- ◆ Support business uses in the Riverfront District that enhance recreational uses on the water.



- ◆ Continue partnering with and supporting the St. Helens Marina in managing Sand Island.
- ◆ Investigate opportunities and partnerships for bicycle sharing or renting bicycles, with a focus on opportunities for bicycling between the Houlton Business and Riverfront Districts. The City may be able to provide space for bicycle sharing or a "popup" rental business.
- ◆ Support development of multi-use trails and other recreational opportunities in St. Helens, including infrastructure necessary to support bicycling, such as between the Houlton Business and Riverfront Districts.
- ◆ Evaluate opportunities for seasonal transit or tram that connects the Houlton Business and Riverfront Districts.



Appendix A. National, State, and Regional and Local Trends

The economic trends discussed in this appendix are based on long-term trends that are generally expected to continue on national, state, and regional scales.

National and State Trends

Economic development in St. Helens over the next 20 years will occur in the context of long-run national and state trends. The most important of these trends are as follows:

- ◆ **Slower labor force growth will be offset by increased productivity gains.** According to the Oregon Office of Economic Analysis (OEA), economic growth is determined by two key factors: the number of workers and their productivity levels. While Oregon's labor force growth is slowing due to low birth rates and pandemic-related migration changes, this will be offset by increased productivity gains as businesses seek to operate more efficiently in a tight labor market.
 - Employment in Oregon is expected to increase but at a slower rate than it has in the past. The OEA forecasts that total nonfarm employment in Oregon will increase by 5.1% from 1.95 million in 2022 to 2.05 million in 2027. Similarly, total *private* nonfarm employment is projected to grow by 5.4% from 1.65 million in 2022 to 1.74 million in 2027.²²
 - Nationally, growth in productivity (as measured by output per hour of labor input) was slower between 2005 and 2018, averaging an annual rate of 1.3%, compared to 2.1% over the longer period from 1947 to 2018.²³ However, productivity experienced a rebound, rising in 2019-2020 before dipping in 2021-2022, then increasing by 5% in Q3 2023.²⁴ In Oregon specifically, productivity grew by nearly 3% per year from 2019-2022.²⁵

Looking ahead, Oregon's economic growth over the next decade is anticipated to be driven by faster productivity gains. These gains are expected to stem from an increase in start-ups, increased federal investment, and the transformative

²² Oregon Economic Analysis, Oregon Economic and Revenue Forecast, March 2024. Vol. XLIV, No. 1. Release date February 2024. <https://www.oregon.gov/das/oea/Documents/OEA-Forecast-0324.pdf>

²³ Bureau of Labor Statistics, Monthly Labor Review, April 2021

²⁴ Bureau of Labor Statistics News Release, December 2023

<https://www.bls.gov/news.release/pdf/prod2.pdf>

²⁵ Josh Lehner, Oregon Office of Economic Analysis, Bureau of Labor Statistics

<https://oregoneconomicanalysis.com/2023/08/25/state-productivity-and-labor-growth-graph-of-the-week/>



potential of generative artificial intelligence (AI) technologies, which will help offset the impact of a slower-growing labor force.²⁶

- ◆ **Manufacturing remains an important part of Oregon's economy.** Between 2010 and 2019, Oregon added 34,000 manufacturing jobs, an increase of 21%. Despite a decrease of about 5,500 jobs (3%) between 2019 and 2022, manufacturing remains a crucial component of Oregon's economy.²⁷

Oregon's manufacturing sector grew slightly faster than the national average between 2010 and 2022, with 9.9% growth compared to the national average of 8.4%. The sectors with the largest shares of manufacturing employment in Oregon are computer and electronics components, food manufacturing, wood products, and fabricated metals and machinery.²⁸

- ◆ **Shifts in Oregon's high-growth industries.** Looking ahead, the state's traditionally strong timber and high-tech industries are expected to experience slower job growth in the future. While the semiconductor industry will benefit from the CHIPS Act investments, employment gains are expected to lag productivity increases.^{29,30} Similarly, the timber sector is expected to remain under pressure from both market-based conditions and federal regulations. However, investments like the Economic Development Administration's \$41.4 million Build Back Better grant to the Oregon Mass Timber Coalition are expected to benefit the industry and potentially drive job growth.³¹

Despite slowing employment growth in the high-tech and timber industries, many of the state's other larger industries like management of companies, food/beverage manufacturing, published software, and healthcare are expected to perform well over the next decade. Other opportunities will come in industries where Oregon has less employment currently. These industries, like consulting, computer system design, financial investment, and scientific R&D, are expected to grow quickly in the decade ahead.³²

- ◆ **Increases in automation across sectors.** Automation has been a long-running trend in employment, leading to productivity gains across sectors. Additionally, the enhancement of artificial intelligence (AI) is expanding automation possibilities beyond routine tasks to jobs previously thought impervious, such as office and cognitive roles. However, complete job replacement due to AI is expected to be minimal with task

²⁶ Oregon Economic Analysis, Oregon Economic and Revenue Forecast, March 2024. Vol. XLIV, No. 1.

²⁷ Oregon Employment Department Covered Employment and Wages, 2010 to 2022

²⁸ Oregon Employment Department, Made in Oregon: A profile of the State's Manufacturing Sector, August 2022.

²⁹ Oregon Economic Analysis, Oregon Economic and Revenue Forecast, March 2024. Vol. XLIV, No. 1.

³⁰ The federal CHIPS Act (2022) was passed to spur investment in advanced manufacturing, including supply chain improvements and research and development. Because of Oregon's prominent semiconductor industry, the State has taken a proactive approach by initiating a coordinated strategy for pursuing and leveraging CHIPS funds.

³¹ Oregon Mass Timber Coalition, <https://www.masstimbercoalition.org/>

³² Oregon Economic Analysis, Oregon Economic and Revenue Forecast, March 2024. Vol. XLIV, No. 1.



efficiencies and shifting tasks within jobs as more likely outcomes).^{33,34} The U.S. Government Accountability Office (GAO) reports that automation could be widespread, with anywhere from 9% to 47% of jobs being automated in the future according to academic research.³⁵

The GAO identified that jobs requiring a blend of soft skills (management, interpersonal), process skills, and technical expertise face lower automation risks. Most of the top 20 in-demand jobs share this mixed skill set trait, including nurse practitioners, statisticians, occupational therapy assistants, home health aides, physical therapist assistants, medical managers, physician assistants, information security analysts, and data scientists, among others.³⁶ Lower-wage jobs are the most likely to be automated. The GAO reported that over 80% of jobs paying less than \$20 per hour are susceptible to automation over the next two decades. About 30% of jobs paying \$20 to \$40 per hour and 4% of jobs paying \$40 or more per hour were also identified as at risk.³⁷

Oregon's automation trajectory mirrors national trends, with lower and middle-wage jobs facing higher automation potential. The state's tight labor market may further drive productivity and efficiency gains bolstered by AI's transformative potential.

- ◆ **The aging of the baby boomer generation and the need for replacement workers.** As the baby boomer generation continues to retire, the number of Social Security recipients is expected to increase from over 65 million in 2022 to over 86 million in 2045, a 32% increase. In 2022, there were 36 Social Security beneficiaries per 100 covered workers, but by 2045, there will be 45 beneficiaries per 100 covered workers. This will increase the percent of the federal budget dedicated to Social Security and Medicare.³⁸

While the Bureau of Labor Statistics projects total U.S. employment to grow by 4.7 million jobs from 2022 to 2032, this job growth is unlikely to be sufficient to replace all the baby boomer retirees leaving the workforce during that period. The BLS estimates there will be 18.6 million annual job openings arising from the need to replace retiring workers and workers changing occupations, in addition to openings from newly created positions.³⁹ The sectors expected to grow the fastest are healthcare support,

³³ BLS, Growth Trends for Selected Occupations Considered at Risk from Automation, July 2022, <https://www.bls.gov/opub/mlr/2022/article/growth-trends-for-selected-occupations-considered-at-risk-from-automation.htm>

³⁴ Manhattan Strategy Group, Job Automation Risk and the Future of Skills: Skills and Competency Change in the U.S. Workforce, May 2023, <https://www.dol.gov/sites/dolgov/files/OASP/evaluation/pdf/FutureofSkillsLitScan-20230515.pdf>

³⁵ Government Accountability Office, Workforce Automation, August 2022, <https://www.gao.gov/assets/gao-22-105159.pdf>

³⁶ Government Accountability Office, Workforce Automation, August 2022.

³⁷ Executive Office of the President. (2016). Artificial Intelligence, Automation, and the Economy.

³⁸ The Board of Trustees, Federal Old-Age and Survivors Insurance and Federal Disability Insurance Trust Funds, 2023 <https://www.ssa.gov/oact/TR/2023/tr2023.pdf>

³⁹ Bureau of Labor Force Occupational Separations and Openings, 2022-2032 <https://www.bls.gov/emp/tables/occupational-separations-and-openings.htm>



computer and mathematical occupations, healthcare practitioners, and community and social service.⁴⁰

- ◆ **Growth of entrepreneurship and small businesses.** The creation of new businesses plays a vital role in driving Oregon's economic growth. Start-ups generate employment opportunities, introduce innovative products and services, and help better serve local communities. According to the 2023 Small Business Profile from the U.S. Small Business Administration Office of Advocacy, small businesses (defined as having between zero and 500 employees) account for 99.9% of total businesses in the United States and employ 46% of the American workforce. Oregon's performance in early-stage entrepreneurship activity, as measured by the Kauffman Early-Stage Entrepreneurship (KESE) Index, ranked 25th in the country in 2020.^{41,42}

Start-up activity had been trending down for decades in Oregon and across the nation leading up to the pandemic, but since the pandemic, new business formation has increased and appears to be maintaining this higher rate.⁴³ In terms of outlook for start-ups, several key factors are at play. High inflation, rising interest rates, and recession risks, along with tighter venture capital and banking lending conditions, will likely slow new business formation. However, several favorable factors could mitigate these impacts and support continued strength in entrepreneurship and small business formation in Oregon. These include increased personal savings and home equity levels, which are common funding sources for new businesses, along with the shift toward remote work opportunities and the large millennial generation entering their prime entrepreneurial years (late 30s and early 40s, according to Census Bureau research).⁴⁴

- ◆ **Continued transformation of retail.** In the last two decades, retail sales by e-commerce and warehouse clubs/supercenters (a lower-cost model to the traditional department store) have increased steadily. Online retail purchases increased from about 6% of all retail purchases in 2014 to about 16% of retail purchases in 2023.⁴⁵ Ultimately, the growth in online shopping and the increasing dominance of large supercenters has made it difficult for small and medium-sized retail firms (offering a narrower selection of goods) to compete. Declining net profits and increased competitive pressures have led many well-known retailers (e.g., JCPenney, Macy's, Sears) to declare bankruptcy or to scale back their operations.

In the future, the importance of e-commerce will likely continue to grow. However, despite the highly publicized closures of brick-and-mortar stores, physical retail is

⁴⁰ Bureau of Labor Statistics Employment Projections – 2022-2032, September 2023
<https://www.bls.gov/news.release/pdf/ecopro.pdf>

⁴¹ Kauffman Foundation. *Kauffman Indicators of Entrepreneurship*. Early-Stage Entrepreneurship. The Kauffman Index, Oregon. <https://indicators.kauffman.org/>.

⁴² This index comprises four statistics: the rate of new entrepreneurs, the opportunity share of new entrepreneurs, start-up density, and start-up early survival rate.

⁴³ Josh Lehner. "Strong Startup Activity Continues" Oregon Office of Economic Analysis, May 3, 2023. Retrieved from <https://oregoneconomicanalysis.com/2023/05/03/strong-start-up-activity-continues/>

⁴⁴ Josh Lehner. "Strong Startup Activity Continues" Oregon Office of Economic Analysis, May 3, 2023. Retrieved from <https://oregoneconomicanalysis.com/2023/05/03/strong-start-up-activity-continues/>

⁴⁵ U.S. Census Bureau News, Quarterly Retail E-Commerce Sales, 4th Quarter 2023
https://www.census.gov/retail/mrts/www/data/pdf/ec_current.pdf



likely to remain an important part of the retail sector as well. Since modern consumers are increasingly price sensitive, less brand loyal, and (since the advent of internet) able to substitute between retailers easily, retailers must be nimble and able to adjust to the changing needs of their customers if they are to remain competitive.

The types of brick-and-mortar retail and related services that are likely to remain viable are those offering goods that consumers prefer to purchase in person or goods that are difficult to ship and return, such as large furniture items. Additionally, retailers specializing in groceries, personal goods that are needed immediately, restaurants, and experiential offerings like entertainment or social activities are expected to maintain their presence. According to the Urban Land Institute, large retailers such as Macy's, Nordstrom, Kohl's, and Ikea are experimenting with downsizing storefronts to operate spaces that can be flexible to changing consumer needs. These locally scaled shops feature in-person merchandise and services that are in demand for modern consumers: curated inventory, tailored services, and e-commerce fulfillment.⁴⁶

- ◆ **Changing places where work is being done.** The COVID-19 pandemic accelerated the trend of remote work. According to the Bureau of Labor Statistics' American Time Use Survey, the share of employees working from home rose from 24% in 2019 to 34% in 2022.⁴⁷ However, the ability to work remotely is not equally distributed. Those most likely to have remote work opportunities tend to have higher educational attainment, be white or Asian, and be over 25 years old.⁴⁸ This uneven access to remote work raises equity concerns, as certain demographic groups may be disadvantaged in accessing these flexible work arrangements.

Remote work trends have consequences for downtown health and recovery. OEA found that downtown recoveries are not driven by regional economic changes but rather are impacted by the strength of three components: workers, residents, and visitors.⁴⁹ If a significant portion of previous downtown workers are now working remotely from other locations, downtowns need to capture or bolster resident and visitor spending to counteract this shift.

- ◆ **Continued increase in demand for energy even as the sources supplying that energy shifts.** The 2022 Inflation Reduction Act aims to drive increased investments in climate and energy projects across the United States.⁵⁰ As a result of the renewable energy investments and subsidies introduced by this legislation, the nation's energy consumption pattern is anticipated to undergo a shift over the coming years. There is an expected move away from traditional fossil fuels like crude oil and natural gas toward renewable energy sources.⁵¹

⁴⁶ Holly Dutton. "More Retailers Are Rolling out Small-Format Stores" *Urban Land Institute*, January 8, 2024. <https://urbanland.uli.org/economy-markets-trends/more-retailers-are-rolling-out-small-format-stores>

⁴⁷ BLS, American Time Use Survey, 2023, <https://www.bls.gov/news.release/atus.nr0.htm#:~:text=On%20average%2C%20those%20who%20worked,to%2034%20percent%20in%202022.>

⁴⁸ Ben Casselman, Emma Goldberg, and Ella Koeze. "Who still works from home?" *New York Times*, March 8, 2024.

⁴⁹ Oregon Office of Economic Analysis, Downtown Recoveries 2023 Update, <https://oregoneconomicanalysis.com/2023/07/18/downtown-recoveries-2023-update/>

⁵⁰ Energy Information Administration, Inflation Reduction Act of 2022

⁵¹ Energy Information Administration, Inflation Reduction Act of 2022



However, this shift is not expected to reduce overall energy consumption. From 2022 to 2050, the U.S. Energy Information Administration (EIA) estimates that total energy consumption will rise due to population growth and economic expansion outpacing efficiency gains. This increasing demand is anticipated to be driven primarily by the industrial sector and, to a lesser extent, transportation.

- ◆ **Impact of rising energy prices on commuting patterns.** As energy prices increase over the planning period, transportation energy consumption is expected to shift to electric or fuel-efficient vehicles.⁵² The share of electric vehicles is expected to grow from less than 6% in 2022 to 19% in 2050.⁵³ The EIA estimates an 8% increase in transportation energy consumption, partially attributable to increasing vehicle miles traveled (VMT) that offset efficiency upgrades. With expected increases in fuel economy, people may commute farther while consuming less energy. VMT for passenger vehicles is forecasted to increase between 12% and 33% through 2050. Lower-income households may face financial barriers to efficiency upgrades and tend to have longer commutes, which may force them to face the brunt of rising energy prices.
- ◆ **High rates of inflation.** For the last several decades, inflation rates have generally stayed below 3% in the United States. Inflation started to increase in 2021, reaching 9.1% in 2022, the highest levels in about 40 years.⁵⁴ In 2023 the annual inflation rate was 3.4%, a marked reduction from the 2022 inflation rate.⁵⁵ Continued high rates of inflation may slow economic growth, further erode purchasing power, discourage savings, and lead to a national recession.
- ◆ **Income gains in Oregon.** Oregon's economic growth in the past decade has led to improvements in the state's income and wage levels relative to the rest of the nation. Notably, Oregon's median household income has surpassed the national level for the first time in over 50 years.⁵⁶ Higher incomes can have positive impacts on an economy through improved standards of living and higher consumer spending, increased tax revenue potential, and talent attraction and retention, among others.
- ◆ **Potential impacts of global climate change.** Oregon and the Pacific Northwest have been experiencing the impacts of global climate change over the past 30 years, exacerbated by extreme events such as the 2020 Labor Day fires that burned over 840,000 acres in Oregon and the June 2021 heat dome that caused temperatures to soar to 111°F in Eugene and 116°F in Portland.⁵⁷ According to the National Oceanic and Atmospheric Administration (NOAA), between 1980 and 2023, the U.S. experienced an average of 8.5 weather-related disasters per year where overall damages/costs

⁵² Energy Information Administration, 2023, *Annual Energy Outlook 2023 with Projections to 2050*, U.S. Department of Energy, March 2023.

⁵³ Energy Information Administration, 2019, *Annual Energy Outlook 2019 with Projections to 2050*, U.S. Department of Energy, January 2019.

⁵⁴ Bureau of Labor Statistics, U.S. Department of Labor, *The Economics Daily*, Consumer prices up 9.1% over the year ended June 2022, largest increase in 40 years at <https://www.bls.gov/opub/ted/2022/consumer-prices-up-9-1-percent-over-the-year-ended-june-2022-largest-increase-in-40-years.htm> (visited July 25, 2022).

⁵⁵ Bureau of Labor Statistics, U.S. Department of Labor, *The Economics Daily*, Consumer Price Index: 2023 in Review, <https://www.bls.gov/opub/ted/2024/consumer-price-index-2023-in-review.htm>

⁵⁶ Oregon Economic Analysis, Oregon Economic and Revenue Forecast, March 2024. Vol. XLIV, No. 1.

⁵⁷ <https://www.ncei.noaa.gov/access/monitoring/monthly-report/national/202106/supplemental/page-6>.



reached or exceeded \$1 billion (adjusted for inflation). However, the number of such events has increased in the last five years, with an average of 20.4 events per year.⁵⁸ The Pacific Northwest is not only experiencing an increased frequency and severity of extreme weather events but also long-term climatic changes. These long-term changes include:

- **Increased average annual day and nighttime temperatures.** If greenhouse gas (GHG) emissions continue at the current rate, temperatures in Oregon are projected to rise approximately 5°F by the 2050s and 8.2°F by the 2080s.⁵⁹ These higher overall temperatures can have consequences, including increased mortality rates, the spread of diseases, and the forced migration of plants and animals as ecosystems undergo changes. Vegetation may become stressed and die, leading to an accumulation of fuel loads that heighten the risk of wildfires. Some areas that were once forestlands are transitioning into shrublands after being affected by forest fires.
- **Reduced snowpack and increased drought conditions.** As temperatures increase, snowpack is anticipated to decrease, reducing stream levels and water availability in the summer months.⁶⁰ Drought conditions can reduce surface water availability, reduce hydropower generation, and reduce recreational activities.⁶¹
- **Increased risk of high heat events.** Climate change increases the likelihood of experiencing high heat events like the June 2021 extreme heat wave that resulted in temperatures ranging from 110°F to 120°F in Oregon and Washington. This heat event caused approximately 159 deaths in Washington and more than 100 deaths in Oregon.^{62,63}
- **Increased risk of wildfire.** Changing precipitation patterns and drought conditions are increasing fuel loads in wildland areas, increasing the risk of wildfires throughout the Pacific Northwest. Wildfire intensity, duration, and size has increased.

⁵⁸ <https://www.ncei.noaa.gov/access/billions/#:~:text=Menu-Overview,376%20events%20exceeds%20%242.655%20trillion.>

⁵⁹ Fleishman, E., editor. 2023. Sixth Oregon Climate Assessment. Oregon Climate Change Research Institute, Oregon State University, Corvallis, Oregon. <https://blogs.oregonstate.edu/occri/oregon-climate-assessments>.

⁶⁰ WASHINGTON Assessment work. TBD.

⁶¹ Bumbaco, K.A., C.L. Raymond, L.W. O'Neill, A. Mehta, D.J. Hoekema. 2023. *2022 Pacific Northwest Water Year Impacts Assessment*. A collaboration between the Office of the Washington State Climatologist, Climate Impacts Group, Oregon State Climatologist, Idaho Department of Water Resources, and NOAA National Integrated Drought Information System. <https://doi.org/10.6069/T5Q5-TT59>

⁶² Joan A. Casey, Robbie M. Parks, Tim A. Bruckner, Alison Gemmill, and Ralph Catalano. 2023: *Excess Injury Mortality in Washington State During the 2021 Heat Wave*. *American Journal of Public Health* 113. 657_660, <https://doi.org/10.2105/AJPH.2023.307269>

⁶³ Vital Statistics Report. Oregon: Oregon Health Authority, Public Health Division, Center for Health Statistics. Prepared September 2021; data are preliminary and subject to change.



- **More days of poor air quality from wildfire smoke.** In 2021, people in Deschutes County, Klamath County, and Jackson County experienced 83 days of air quality at or above unhealthy levels for sensitive groups due to wildfire smoke.⁶⁴
- **More floods and atmospheric rivers.** The University of Washington's Climate Impact Group forecasts that the Pacific Northwest will experience slightly more precipitation in the fall, winter, and spring and less in the summer.⁶⁵ Extreme precipitation events are more likely to produce flooding, erosion, and landslides. These changes can threaten salmon and other species. Adaptation to extreme events could require expensive upgrades to stormwater systems.

Climate change will have a wide range of impacts on industries and communities throughout the Pacific Northwest. While some industries are more resilient to climate change, others that require predictable delivery of water, such as agriculture and hydropower, are more vulnerable to climate change. Climate change and extreme weather events also impact human health and disrupt travel. Land use decisions, in part, determine the risk that homes, businesses, schools, hospitals, and other buildings face from climate change. Development patterns in at-risk areas like tsunami zones, floodplains, wetlands, wildland-urban interfaces, and other hazardous locations will impact the economic vitality and resilience of communities as climate change accelerates.

- **Agriculture.** Climate change impacts the quality and quantity of agricultural products. For example, exposure to cold weather during dormancy is important for fruit set and quality in many perennial crops. Exposure to cold weather may increase in northern areas of the Pacific Northwest and decrease in southern areas.⁶⁶ A study by the Washington State Department of Agriculture found that a drought in 2015 caused \$633 to \$773 million in agricultural losses.⁶⁷ Drought and shifting precipitation patterns represent major threats, as drought reduces feed on rangelands for livestock and decreases water available for irrigation.
- **Aquatic/Fishing.** Marine heat waves impact fresh and saltwater habitats and species. In 2021, algal blooms exacerbated by increased temperatures resulted in a \$641.1 million (in 2022 dollars) loss of commercial fishing revenue.⁶⁸ Tribes are often disproportionately impacted, accounting for half of fishery loss requests and experiencing losses from Dungeness crab fisheries.^{69,70}

⁶⁴ Barnack, A. Wildfire Smoke Trends and the Air Quality Index. Oregon: Department of Environmental Quality, Laboratory and Environmental Assessment Division [cited 2023 May 5]. 24 p. Available from: <https://www.oregon.gov/deq/wildfires/Documents/WildfireSmokeTrendsReport.pdf>.

⁶⁵ <https://express.adobe.com/page/C5CQaxjHUmGQ7/>

⁶⁶ Noorazar, H., L. Kalcsits, V.P. Jones, M.S. Jones, and K. Rajagopalan, 2022: Climate change and chill accumulation: Implications for tree fruit production in cold-winter regions. *Climatic Change*, **171** (3), 34. <https://doi.org/10.1007/s10584-022-03339-6>

⁶⁷ Raymond, C.L., T.P. Nadreau, M. Rogers, Z. Kearn. 2022. Biophysical Climate Risks and Economic Impacts for Washington State. Report prepared for the Washington State legislature. Climate Impacts Group, University of Washington, Seattle.

⁶⁸ Bellquist, L., V. Saccomanno, B.X. Semmens, M. Gleason, and J. Wilson, 2021: *The rise in climate change-induced federal fishery disasters in the United States*. *PeerJ*, **9**, e11186. <https://doi.org/10.7717/peerj.11186>

⁶⁹ Bellquist, L., V. Saccomanno, B.X. Semmens, M. Gleason, and J. Wilson, 2021: *The rise in climate change-induced federal fishery disasters in the United States*. *PeerJ*, **9**, e11186. <https://doi.org/10.7717/peerj.11186>

⁷⁰ Schlinger, C., O. Conroy-Ben, C. Cooley, N. Cooley, M. Cruz, D. Dotson, J. Doyle, M.J. Eggers, P. Hardison, M. Hatch, C. Hogue, K. Jacobson Hedin, C. Jones, K. Lanphier, D. Marks-Marino, D. Mosley, F. Olsen Jr., and M.



- **Forestry.** Forest plants and animals vulnerable to temperature and drought stresses are undergoing climate-induced die-offs. Five fir species in Oregon, Washington, and Northern California are experiencing severe mortality dubbed "Firmageddon."⁷¹ Species at the edges of their ranges are expected to succumb first and may shift to higher elevations or northward. Die-offs include Douglas fir, a primary commercial timber species. Die-offs and stressed trees face higher risks of pest infestations and increase the risk of wildfires.
- **Human health.** With many Pacific Northwest households lacking air conditioning, higher summer temperatures and extreme heat events endanger vulnerable groups like older adults, low-income residents, those with disabilities, and individuals living alone who face heightened risks of heat stroke and death.
- **Tourism, Recreation, and Service Industries.** The Northwest tourism and recreation industry employs about 588,000 people and supports almost \$60 billion (in 2022 dollars) in annual expenditures.⁷² Climate impacts will vary as decreased snowpack will make trails and camping accessible later in the fall and earlier in the spring, but increased extreme events from atmospheric rivers may increase maintenance costs due to flooding and erosion. Higher temperatures will increase demand for water-based recreation; however, droughts may decrease lake, reservoir, and river levels during peak recreation season.
- **Infrastructure.** Water, sewer, roads, utilities, and other infrastructure face risks if not designed to withstand climate change and extreme events. During the June 2021 heat dome, roads buckled near Everett, Washington, and a Portland streetcar cable melted.⁷³ Damaged power lines can lead to wildfires (a problem utility companies have started to mitigate by preemptively shutting down power when windy and dry conditions occur).⁷⁴ Rural communities relying on single water sources may be in jeopardy as droughts reduce groundwater aquifers or surface water availability. Sea level rise and flooding also threaten septic wastewater treatment systems. Atmospheric rivers and flooding can damage highways and streets through inundation and landslides, temporarily halting travel access to jobs, schools, healthcare, grocery stores, etc., necessitating expensive repairs and long detours. Additionally, the Pacific Northwest's hydropower dependency means the region may see fluctuations in electricity availability and costs as altered snowpack and precipitation patterns make the water supply less predictable.

Peacock, 2021: Ch. 4.2. Water. In: *Status of Tribes and Climate Change Report*. Marks-Marino, D., Ed. Institute for Tribal Environmental Professionals, Flagstaff, AZ, 98–141. <http://nau.edu/stacc2021>

⁷¹ <https://www.seattletimes.com/seattle-news/climate-change-is-hastening-the-demise-of-pacific-northwest-forests/>

⁷² Mojica, J., K. Cousins, and T. Madsen, 2021: Economic Analysis of Outdoor Recreation in Oregon. Earth Economics, Tacoma,

WA. https://static1.squarespace.com/static/561dc6c6e4b039470e9afc00/t/5ffe3084ce56a6552b7a3c71/1610494115376/EconomicAnalysisofOutdoorRecreationinOregon_OTC-EarthEconomics_SmallRes.pdf

⁷³ <https://www.npr.org/2021/06/29/1011269025/photos-the-pacific-northwest-heatwave-is-melting-power-cables-and-buckling-roads>

⁷⁴ EPI, 2023: Wildfire-Grid Risk, Power Talk. Boise State University, Energy Policy Institute. <https://www.boisestate.edu/epi/upcomingevents/>



Regional and Local Trends

Throughout this section of Appendix A., St. Helens is compared to Columbia County and the State of Oregon. These comparisons are meant to provide context for changes in St. Helens' socioeconomic characteristics. Additionally, information based on the 2018-2022 ACS is described as 2022 data to enhance readability.

Availability of Labor

The availability of trained workers in St. Helens will impact the development of its economy over the planning period. A skilled and educated populace can attract well-paying businesses and employers and spur the benefits that follow from a growing economy. Key trends that will affect the workforce in St. Helens over the next 20 years include its growth in its overall population, growth in the senior population, and commuting trends.

POPULATION CHANGE

Population growth in Oregon tends to follow economic cycles. Oregon's population grew from 3.4 million people in 2000 to 4.3 million people in 2023, an increase of more than 870,000 people or 1.0% each year.

Between 2000 and 2023, St. Helens' population increased by 4,990 people at an average annual rate of 1.8% (Exhibit 22), exceeding both Columbia County's and Oregon's growth rates during the same time (0.9% and 1.0%, respectively).

Exhibit 22. Population Growth, St. Helens, Columbia County, and Oregon, 2000–2023

Source: U.S. Census Bureau, 2000, and 2010. Portland State University Population Estimates, 2023.

	Population			Change, 2000 - 2023		
	2000	2010	2023	Number	Percent	AAGR
St. Helens	10,019	12,883	15,009	4,990	50%	1.8%
Columbia County	43,560	49,351	53,143	9,583	22%	0.9%
Oregon	3,421,399	3,831,074	4,291,525	870,126	25%	1.0%

AGE DISTRIBUTION

The number of people ages 65 and older in the United States is projected to increase from 58 million in 2022 to 82 million by 2050 (a 47% increase).⁷⁵ The economic effects of this demographic change include a slowdown of labor force growth, the need for workers to replace retirees, an

⁷⁵ Mather, M. & Scommegna, P. (2024). Fact Sheet: Aging in the United States. <https://www.prb.org/aging-unitedstates-fact-sheet/>



aging workforce as seniors continue working after age 65, an increased demand for healthcare services, and a larger portion of the federal budget dedicated to Social Security and Medicare.⁷⁶

Exhibit 23 through Exhibit 26 show the following trends:

- ◆ St. Helens has a younger population than Columbia County and the state overall. In 2022, only 22% of St. Helens residents were 60 years and older compared to 25% at the state level (Exhibit 25). St. Helens is growing across all age groups, but older age groups are experiencing much faster growth. The increase in median age between 2000 and 2022 suggests that St. Helens is attracting or retaining older adults.
- ◆ Columbia County's population is aging, with the population aged 60 and over projected to increase from 28% in 2024 to 33% in 2044. Columbia County may continue to attract those in their late adult years (i.e., 60 years and older) over the planning period. While the share of retirees in these respective areas may increase over the next 20 years, the share of youth (i.e., under 20 years old) or people in their early adult lives (i.e., 20 to 39 years old) is likely to decrease. While this demographic shift can provide a valuable source of skilled labor and experienced mentorship for younger generations entering the workforce, it also raises concerns about a potential labor shortage as a significant portion of the workforce approaches retirement age.

St. Helens' median age increased between 2000 and 2022 but remained lower than both the county and state.

St. Helens' increase in median age of 4.5 years is comparable to Columbia County's change of 5.4 years and Oregon's change of 3.6 years.

Exhibit 23. Median Age, St. Helens, Columbia County, and Oregon, 2000 to 2018–2022

Source: U.S. Census Bureau, 2000 Decennial Census, Table P013; American Community Survey 2018–2022 5-Year Estimates, Table B01002.

2000	31.8	37.7	36.3
	St. Helens	Columbia County	Oregon
2022	36.3	43.1	39.9
	St. Helens	Columbia County	Oregon

⁷⁶ The Board of Trustees, Federal Old-Age and Survivors Insurance and Federal Disability Insurance Trust Funds, 2022. The 2022 Annual Report of the Board of Trustees of the Federal Old-Age and Survivors Insurance and Federal Disability Insurance Trust Funds, June 2, 2022. The Budget and Economic Outlook: Fiscal Years 2024 to 2034, February 2024.



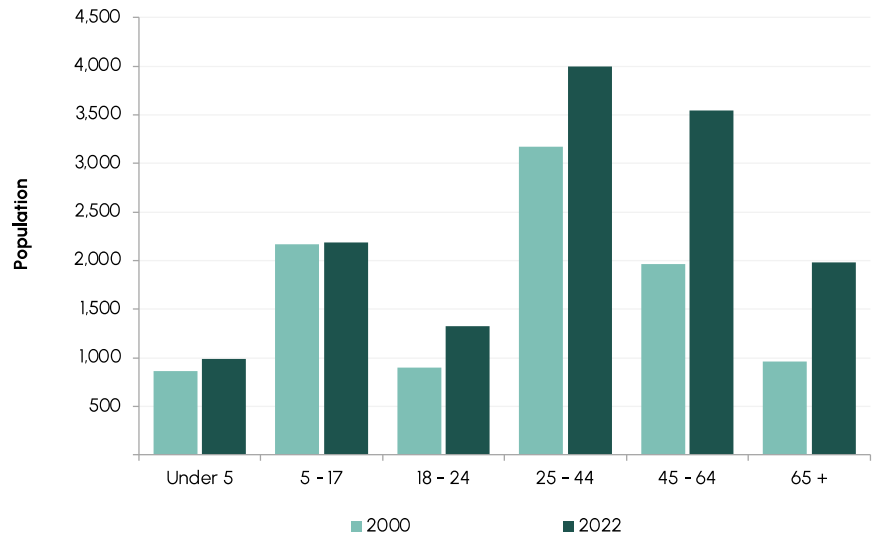
From 2000 to 2022, the population aged 45 to 64 in St. Helens experienced the largest nominal increase among all age groups.

However, the age group that saw the highest percentage increase during this period was the population aged 65 and over.

The age group between 25 and 44 remains the largest age group overall.

Exhibit 24. St. Helens Population Change by Age Group, 2000 to 2018–2022

Source: U.S. Census Bureau, 2000 Summary File P012; American Community Survey 2018–2022 5-Year Estimates, Table B01001.



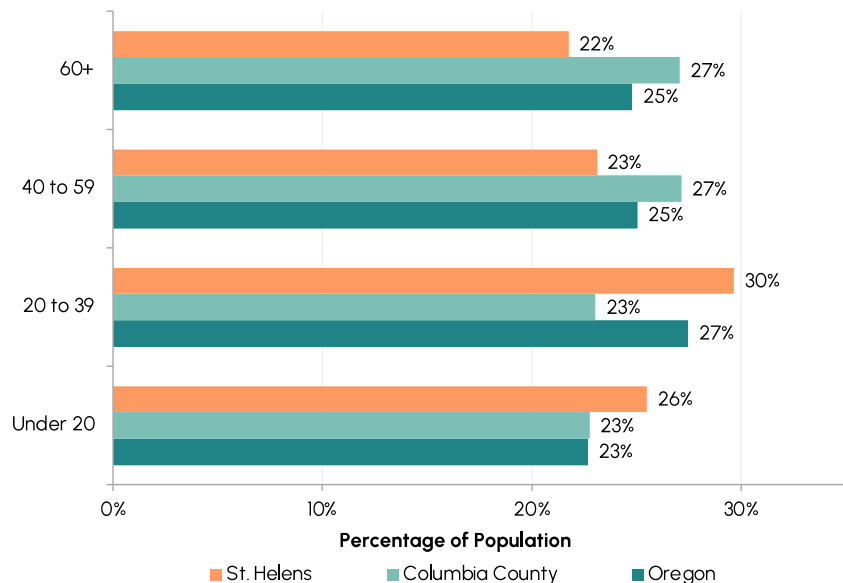
Twenty-two percent of St. Helens residents were over 60 years of age.

The proportion of St. Helens' older residents was lower than that of both the state and Columbia County.

Conversely, the proportion of St. Helens residents 39 years of age and younger was higher relative to Columbia County and Oregon.

Exhibit 25. Population Distribution by Age, St. Helens, Columbia County, and Oregon, 2018–2022

Source: U.S. Census Bureau, American Community Survey, 2018–2022 5-Year Estimates, Table B01001.

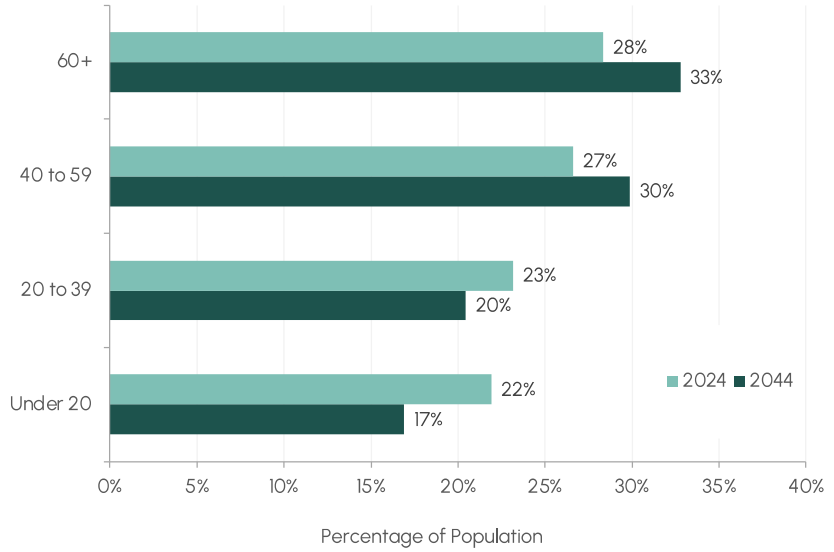


By 2044, Columbia County will have a larger share of residents 40 years and older than it does today.

The share of residents 60 years and older will account for 33% of Columbia County's population in 2044, compared to 28% in 2024. On the other hand, the share of residents younger than 39 will decrease from 45% in 2024 to 37% in 2044.

Exhibit 26. Population Share by Age Group, Columbia County, 2024–2044

Source: Portland State University, College of Urban & Public Affairs: Population Research Center, Population Forecast, 2024.



RACE AND ETHNICITY

St. Helens and Columbia County are becoming more racially and ethnically diverse, though less so than Oregon overall. From 2000 to 2022, the share of the Hispanic/Latino population in St. Helens grew from 4% to 10% of the total population, and the share of people of color increased from 7% to 16%. In Columbia County, the share of people of color rose from 6% to 12% of the total population, while the share of the Hispanic/Latino population grew from 3% to 6%.

Statewide, Hispanic and Latino Oregonians have employment rates that are average or slightly above average compared to the overall population in recent decades. However, their higher employment rates are primarily concentrated in low- and middle-wage occupations such as agriculture, building maintenance, production, construction, food preparation, and transportation and material moving.⁷⁷ Providing culturally specific services, particularly for Spanish speakers, can help improve workforce participation and economic contribution from these growing demographic groups. Such services may also facilitate the entry of Hispanic and Latino workers into higher-wage industries, enabling greater economic opportunities for these communities (if they wish to pursue them).

The population of people of color is defined as the share of the population that identifies as another race other than "white alone" according to Census definitions. The small population in St. Helens results in small sample sizes, and thus people of color are combined into one category rather than showing individual races. The margin of error is considerable for the estimate of these populations.

Exhibit 27 and Exhibit 28 show the change in the share of Hispanic and Latino and people of color in St. Helens compared to Columbia County and Oregon between 2000 and 2022. The group with the largest share of people of color in 2022 is two or more races, representing 13% and 9% of St. Helens' and Columbia County's total populations, respectively.

⁷⁷ Lehner, Josh. "Oregon's Growing Hispanic and Latino Population." Oregon Office of Economic Analysis, 21 June 2023. <https://oregoneconomicanalysis.com/2023/06/21/oregons-growing-hispanic-and-latino-population/>

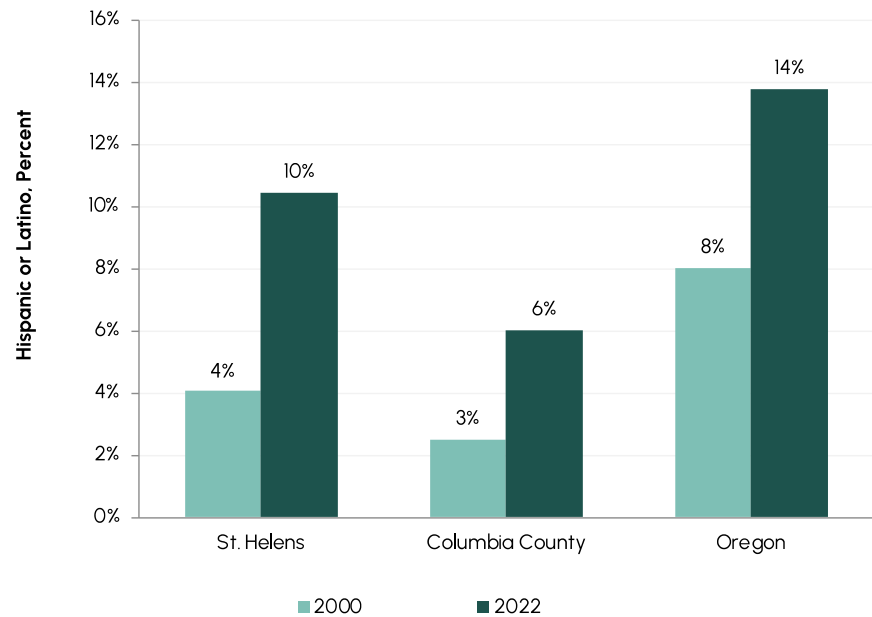


The share of St. Helens residents that identified as Hispanic/Latino increased between 2000 and 2022 from 4% to 10%.

Columbia County and St. Helens are less ethnically diverse than the state overall.

Exhibit 27. Hispanic or Latino Population as a Percentage of the Total Population, St. Helens, Columbia County, and Oregon, 2000, 2018–2022

Source: U.S. Census Bureau, 2000 Decennial Census, Table P008; 2018–2022 American Community Survey, 5-Year Estimates, Table B03002.

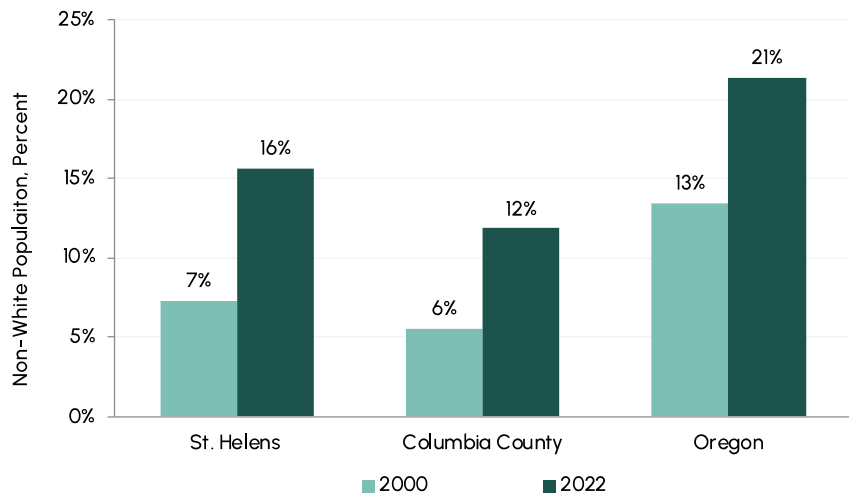


The share of people of color in St. Helens increased between 2000 and 2022.

St. Helens and Columbia County are less racially diverse than the state. In 2022, the share of people of color in St. Helens and Columbia County was 16% and 12%, respectively, compared to 21% statewide.

Exhibit 28. Population of People of Color as a Percentage of the Total Population, St. Helens, Columbia County, and Oregon, 2000, 2018–2022

Source: U.S. Census Bureau, 2000 Decennial Census Table P007; 2018–2022 American Community Survey, 5-Year Estimates, Table B02001.



INCOME AND WAGES

Income and wages affect business decisions for locating in a city. Areas with higher wages may be less attractive for industries that rely on low-wage workers. St. Helens' median household income (\$77,475) was below the county median (\$83,265). In 2022, average wages at private businesses in St. Helens (\$51,135) were also below the county average (\$66,342).

Between 2002 and 2022, Columbia County's average wages increased, as did average wages across the state and the nation. However, when adjusted for inflation, average annual wages grew by 3% in Columbia County while wages grew by 21% in Oregon and 17% across the nation.

From 2002 to 2022, average annual wages in Columbia County grew at a much slower rate of 3% compared to 21% in Oregon and 17% nationwide (adjusted for inflation).

In 2022, the average annual wage in Columbia County was \$51,135, substantially lower than the state average of \$66,342 and the national average of \$69,986.

Not adjusted for inflation, St. Helens' annual average wage increased by \$20,578 (67%), while Columbia County's grew 32,642 (97%) and the nation's grew by \$33,222 (90%).

The median household income in St. Helens was 7% below Columbia County's median household income and 1% above Oregon's.

Exhibit 29. Average Annual Wage, Covered Employment, Columbia County, Oregon, and U.S., 2000 to 2022, Inflation-Adjusted 2022 Dollars

Source: Bureau of Labor Statistics, Quarterly Census of Employment and Wages; State of Oregon Employment Department, Employment and Wages by Industry (QCEW).

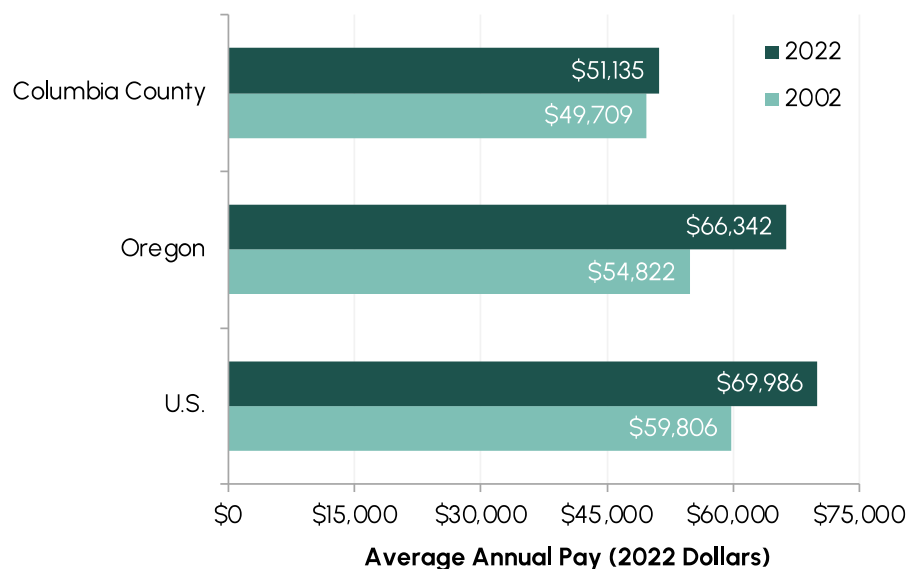


Exhibit 30. Median Household Income (MHI),⁷⁸ 2018–2022

Source: U.S. Census Bureau, American Community Survey 2018–2022 5-Year Estimates, Table B19013.

\$77,475	\$83,265	\$76,632
St. Helens	Columbia County	Oregon

⁷⁸ The Census calculated household income based on the income of all individuals 15 years old and over in the household, whether they were related or not.



St. Helens' median family income was 11% below Columbia County's and Oregon's median family incomes.

About 26% of St. Helens households earned less than \$40,000 annually.

About 33% of St. Helens households earned over \$100,000 annually.

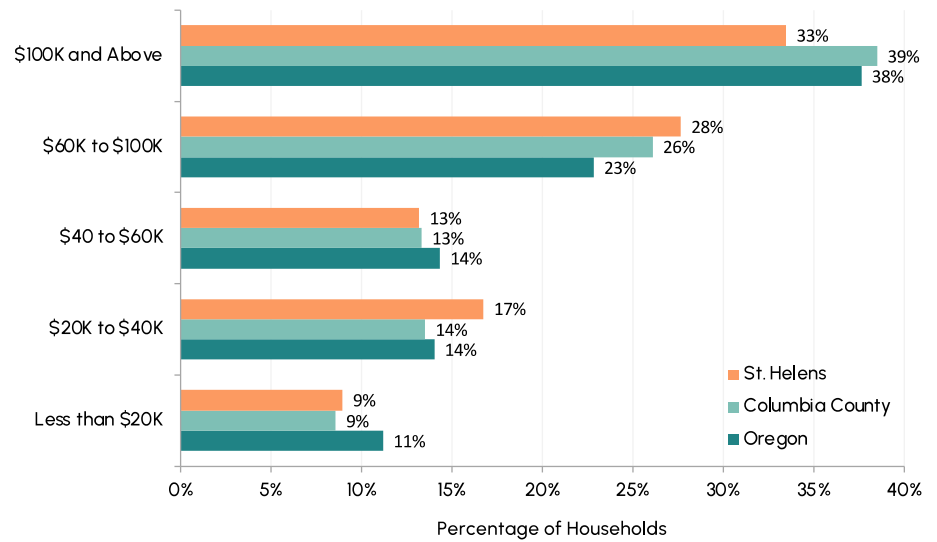
Exhibit 31. Median Family Income,⁷⁹ 2018–2022

Source: U.S. Census Bureau, American Community Survey 2018–2022 5-Year Estimates, Table B19113.

\$84,753	\$94,162	\$94,277
St. Helens	Columbia County	Oregon

Exhibit 32. Household Income by Income Group, St. Helens, Columbia County, and Oregon, 2018–2022, Inflation-Adjusted 2022 Dollars

Source: U.S. Census Bureau, American Community Survey 2018–2022 5-Year Estimates, Table B19001.



⁷⁹ The Census calculated family income based on the income of the head of household, as identified in the response to the Census forms, and income of all individuals 15 years old and over in the household who were related to the head of household by birth, marriage, or adoption.



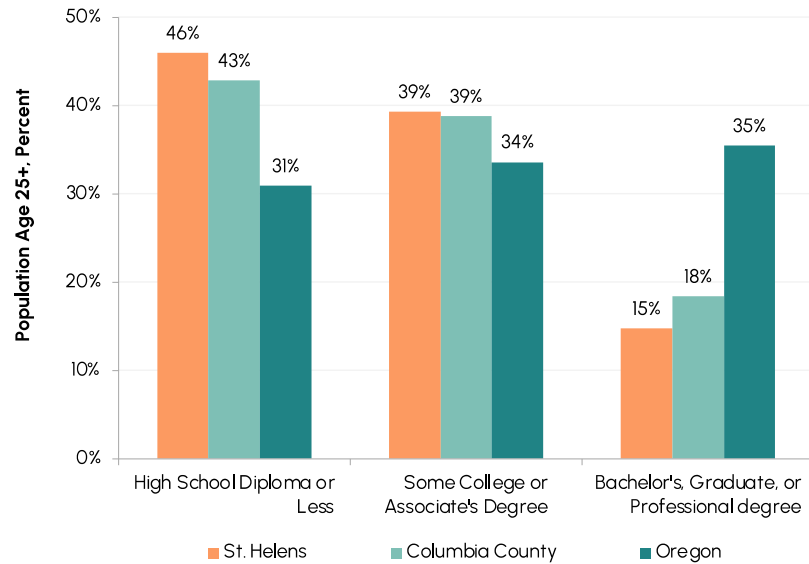
EDUCATIONAL ATTAINMENT

The educational level of a community's workforce is a crucial factor that influences the quality of labor available. Many businesses require access to employees with relevant education and training to meet their staffing needs. A community with a highly educated population is better positioned to attract and retain companies seeking skilled workers.

About 15% of St. Helens residents have a bachelor's, graduate, or professional degree, which is a slightly lower share than the county and a much lower share than the state.

Exhibit 33. Educational Attainment for the Population 25 Years and Over, St. Helens, Columbia County, and Oregon, 2018–2022

Source: U.S. Census Bureau, American Community Survey 2018–2022 5-Year Estimates, Table B15003.



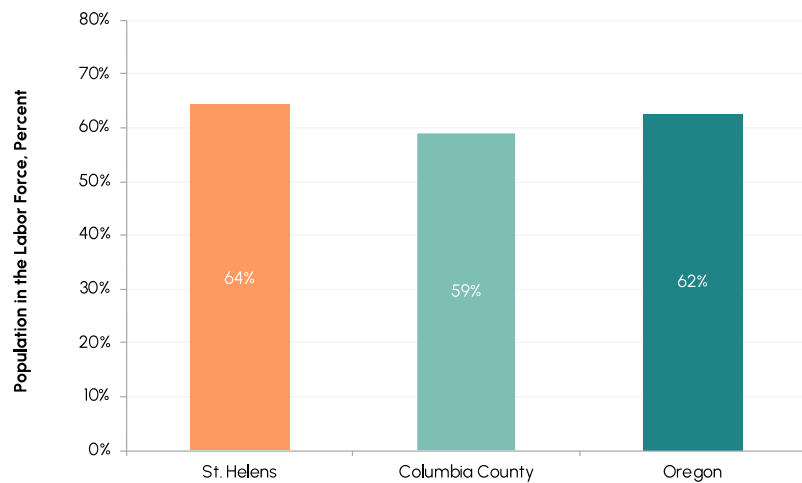
LABOR FORCE PARTICIPATION AND UNEMPLOYMENT

The current labor force participation rate is an important consideration in the availability of labor. The labor force in any market consists of the adult population (16 and over) who are working or actively seeking work. The labor force includes both employed and unemployed people. Children, retirees, students, and people who are not actively seeking work are not considered part of the labor force. According to the 2018–2022 American Community Survey, Columbia County had 25,519 people in its labor force, and St. Helens had 7,196 people in its labor force.

St. Helens has a slightly higher labor force participation rate (64%) relative to Columbia County (59%) and Oregon overall (62%).

Exhibit 34. Labor Force Participation Rate, St. Helens, Columbia County, and Oregon, 2018–2022

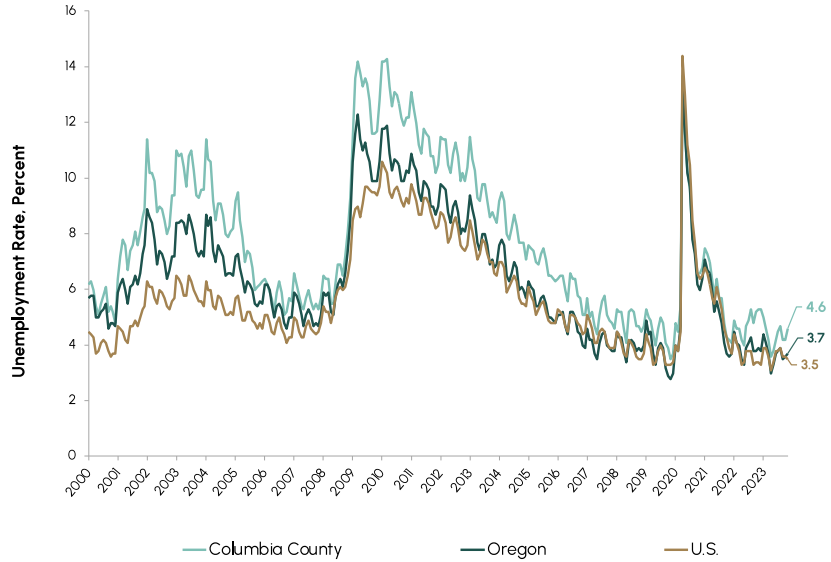
Source: U.S. Census Bureau, American Community Survey 2018–2022 5-Year Estimates, Table B23001.



Columbia County's unemployment rate was 4.6% in December 2023, which was slightly higher than the state of Oregon (3.7%) and the nation (3.5%).

Exhibit 35. Unemployment Rate, Columbia County, Oregon, and the U.S., 2000–2023

Source: Bureau of Labor Statistics, Local Area Unemployment Statistics, and Labor Force Statistics. Not seasonally adjusted.



COMMUTING PATTERNS

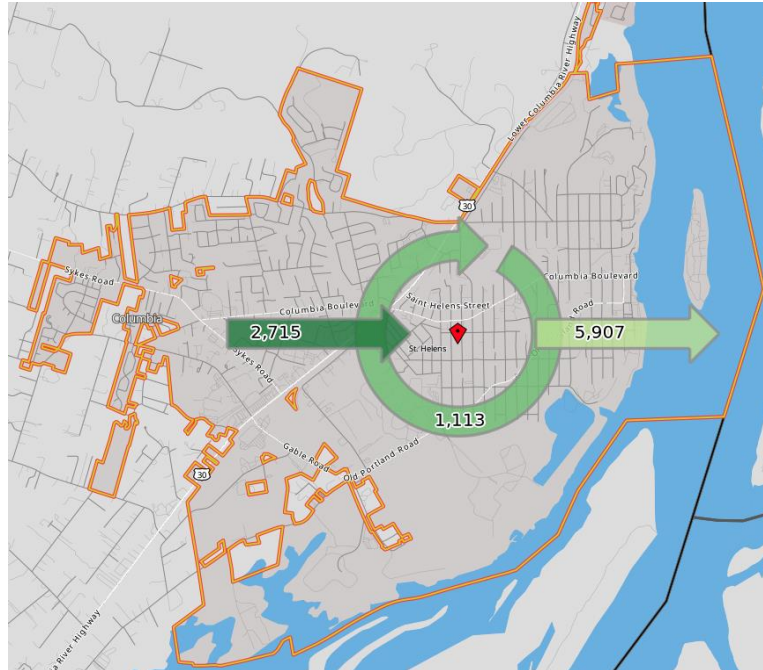
The ability for employers in St. Helens to draw from a labor pool that extends beyond the city limits into neighboring areas in Columbia County and the Portland Metro region is a significant factor contributing to the local economy. This access to a broader workforce through commuting allows businesses in St. Helens to find suitable candidates for available positions, even if the local population alone may not provide enough qualified workers.

St. Helens is part of an interconnected regional economy.

More than 2,700 people commuted into St. Helens for work while 5,900 commuted out of St. Helens for work. About 1,100 people both lived and worked in St. Helens.

Exhibit 36. Commuting Flows, St. Helens, 2021

Source: U.S. Census Bureau, Census On the Map.



29% of all people who were employed at businesses in St. Helens also lived in St. Helens.

About 16% of residents who lived in St. Helens also worked in St. Helens.

27% of St. Helens residents commuted to Portland for work.

Exhibit 37. Places Where St. Helens Workers Lived,⁸⁰ 2021

Source: U.S. Census Bureau, Census On the Map.

29%	7%	6%	4%
St. Helens	Portland	Scappoose	Columbia City

Exhibit 38. Places Where St. Helens Residents Were Employed,⁸¹ 2021

Source: U.S. Census Bureau, Census On the Map.

27%	16%	8%	4%
Portland	St. Helens	Hillsboro	Scappoose

⁸⁰ In 2021, 3,828 people worked at businesses in St. Helens, with 29% (1,113) of workers both living and working in St. Helens.

⁸¹ In 2021, 7,020 residents in St. Helens worked, with 16% of St. Helens residents (1,113) both living and working in St. Helens.

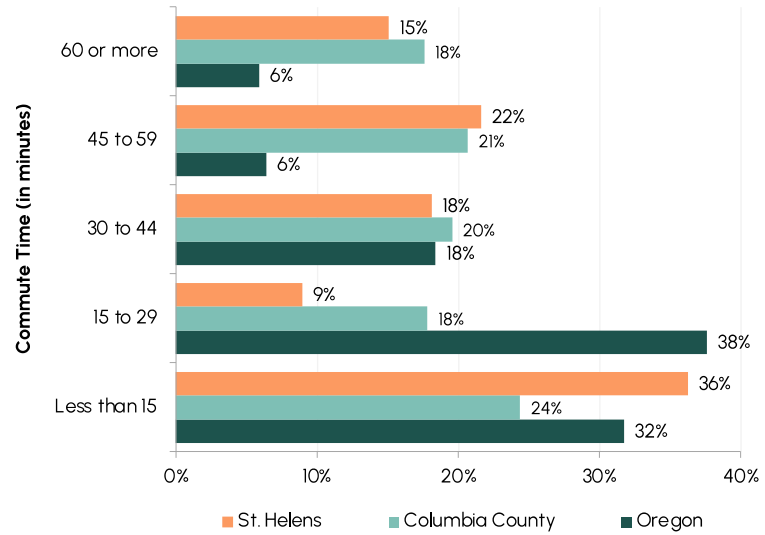


About 36% of St. Helens residents had a commute time of less than 15 minutes.

Just over a third (37%) of St. Helens residents commuted 45 minutes or longer to get to work.

Exhibit 39. Commute Time by Place of Residence, St. Helens, Columbia County, and Oregon, 2018–2022

Source: U.S. Census Bureau, American Community Survey 2018–2022 5-Year Estimates, Table B08303.



Tourism in the Portland Region and Columbia County

Tourism plays a crucial role in local economies by supporting businesses, creating jobs, and generating tax revenue. Dean Runyan Associates, a travel industry research firm, provides tourism data through Travel Oregon's TravelStats dashboard.⁸² According to the dashboard, Columbia County welcomed 215,120 overnight visitors in 2022, representing 14% of overnight travel to the Portland region. These tourists contributed \$25.8 million in direct travel spending in 2021, with the largest expenditures in food services, food stores, and retail.

Direct travel spending in Columbia County increased 78% from 2003 to 2022.

The Portland region's direct travel spending increased by 49% over the same period.

Exhibit 40. Direct Travel Spending (\$ millions), 2003 and 2022

Source: Dean Runyan Associates, Oregon Travel Impacts, 2003-2022p.

2003	\$2,608.7 Portland Region	\$25.8 Columbia County
2022	\$5,156.4 Portland Region	\$45.8 Columbia County

In 2022, the category that saw the highest level of visitor spending in Columbia County was food services, which includes restaurants, cafés, and other establishments that provide prepared meals and beverages.

Exhibit 41. Largest Visitor Spending Categories (\$ millions), Columbia County, 2022

Source: Dean Runyan Associates, Oregon Travel Impacts

\$11.8 Food Services	\$6.8 Food Stores	\$5.8 Retail Sales
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The industry with the most employment generated by travel spending in Columbia County in 2022 was accommodations and food services.

Exhibit 42. Largest Industry Employment Generated by Travel Spending, Columbia County, 2022

Source: Dean Runyan Associates, Oregon Travel Impacts, 2003-2022p

420 jobs Accommodations & Food Services	170 jobs Arts, Entertainment, and Recreation	80 jobs Retail
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⁸² Travel Oregon. "Oregon Travel Impacts dashboard" Dean Runyan Associates. Retrieved March 27, 2024, from <https://www.travelstats.com/impacts/oregon>



Appendix B. Buildable Lands Inventory

The buildable lands inventory identifies commercial and industrial lands that are available for development for employment uses within the St. Helens UGB. This appendix presents methods and definitions used to develop the commercial and industrial buildable lands inventory for the St. Helens UGB. The results (shown in Chapter 4) are based on analyses of the City of St. Helens, Columbia County, and State of Oregon GIS data by EConorthwest and reviewed by City staff. The remainder of this appendix summarizes key findings of the buildable lands inventory.

Methods and Definitions

The Buildable Lands Inventory (BLI) for St. Helens includes all land that allows commercial and industrial uses within the UGB. From a practical perspective, land was included in the BLI if it met all the following criteria:

1. It is inside the St. Helens UGB
2. It is inside a tax lot (as defined by Columbia County), and
3. If its current zoning/comprehensive plan designation allows employment uses. Note that tax lots do not generally include road or railroad rights-of-way or water. The inventory then builds from the tax lot-level database to estimate buildable land by plan designation.

Inventory Steps

The five steps in the BLI are:

1. Generate UGB "land base"
2. Classify lands by buildable area status
3. Identify constraints
4. Verify inventory results
5. Tabulate and map results

Step 1: Generate UGB "Land Base"

The commercial and industrial inventory used all tax lots within the St. Helens UGB with the appropriate types of comprehensive plan designations that fall under those land use categories:

- ◆ General Commercial (GC)



- ◆ Highway Commercial (HC)
- ◆ Light Industrial (LI)
- ◆ Highway Industrial (HI)
- ◆ Unincorporated General Commercial (UGC)
- ◆ Unincorporated Highway Commercial (UHC)
- ◆ Unincorporated Light Industrial (ULI)
- ◆ Unincorporated Highway Industrial (HI)



Exhibit 46 below shows a map of these designations used in the BLI.

Step 2: Classify Lands by Buildable Area Status

In this step, EConorthwest classified each tax lot with an employment plan designation (based on the definitions above) into one of four mutually exclusive categories based on buildable area status:

- ◆ Vacant land
- ◆ Partially vacant land
- ◆ Public land
- ◆ Developed land

EConorthwest identified buildable land and classified buildable area status using a rule-based methodology. The rules are described in Exhibit 43, and the buildable area status classifications of the BLI land base are visualized in map format below in Exhibit 47.



Exhibit 43. Rules for Buildable Area Status Classification

BUILDABLE AREA STATUS	DEFINITION	STATUTORY AUTHORITY
Vacant Land	<p>A tax lot:</p> <p>(a) Equal to or larger than 15,000 sq. ft. not currently containing permanent buildings or improvements; or</p> <p>(b) Equal to or larger than five acres where less than one-half acre is occupied by permanent buildings or improvements</p> <p>For the purpose of criteria (a) above, lands with improvement values of \$0 will be considered vacant.</p>	OAR 660-009-0005(14)
Partially Vacant Land	Partially vacant tax lots are those equal to or larger than one acre where more than one-half acre is occupied by permanent buildings or improvements and could still be further developed based on the zoning. This determination was based on a visual assessment by EConorthwest and City staff.	No statutory definition
Public	Lands in public are considered unavailable for commercial or industrial development. This includes lands in Federal, State, County, City, school district, Port, or other public ownership. Public lands will be identified using the Columbia County assessment property tax exemption codes. EConorthwest also included cemeteries in this group, as they are not likely to develop over the planning period.	No statutory definition
Developed Land	<p>OAR 660-009-0005(1) defines developed land as "Non-vacant land that is likely to be redeveloped during the planning period."</p> <p>Lands not classified as vacant, partially vacant, or public are considered developed.</p>	<p>OAR 660-009-0005(1)</p> <p>EConorthwest proposed to address redevelopment potential on the demand side—operationalizing a definition of developed land consistent with this definition is complicated</p>



Step 3: Identify Constraints

As shown in Exhibit 44, the BLI included development constraints consistent with guidance in OAR 660-009-0005(2).

Exhibit 44. Constraints Included in BLI

DEVELOPMENT STATUS	STATUTORY AUTHORITY	THRESHOLD	SOURCE
Goal 5 Natural Resource Constraints			
Wetlands	OAR 660-009-0005(2)	Wetlands identified by the City or identified as significant by the Oregon Department of State Lands	City of St. Helens; Oregon Department of State Lands
Riparian Corridors	OAR 660-009-0005(2)	Lands within City-defined buffers from streams and waterbodies	City of St. Helens
Protection Zones	OAR 660-009-0005(2)	Lands within a 50 or 75-foot buffer from select delineated wetland edges	City of St. Helens
Willamette River Greenway	OAR 660-009-0005(2)	Lands within the Willamette River Greenway	City of St. Helens
Natural Hazard Constraints			
FEMA Regulatory Floodway and 100-Year Floodplains	OAR 660-009-0005(2)	Lands within FEMA-defined regulatory floodway or 100-year floodplains	FEMA via National Flood Hazard Layer Interactive Viewer
Landslide Hazards	OAR 660-009-0005(2)	Lands categorized as High or Very High Landslide Susceptibility within the Oregon Statewide Landslide Information Database	Oregon Department of Geology and Mining Industries
Steep Slopes	OAR 660-009-0005(2)	Slopes greater than 15%	Oregon Department of Forestry

These areas were evaluated as prohibitive constraints (unbuildable). All constraints were merged into a single constraint file, which was then used to identify the area of each tax lot that is constrained. These areas were deducted from lands identified as vacant or partially vacant. Exhibit 48 below shows a map of the individual constraints.

Step 4: Verify Inventory Results

ECONorthwest used a multistep verification process. The first verification step involved a "visual assessment" of land classifications using GIS and recent aerial photos. The visual assessment involves reviewing classifications overlaid on recent aerial photographs to verify uses on the ground. ECONorthwest reviewed all tax lots included in the inventory using the visual assessment



methodology. The second round of verification involved City staff verifying the visual assessment output. ECONorthwest amended the BLI based on City staff review and a discussion of staff's comments. The final verification is reviewed by stakeholders, most especially by members of the Technical Advisory Committee (TAC).

Step 5: Tabulate and Map Results

The results of the commercial and industrial BLI are presented in tabular form and maps in the remainder of Appendix B. These maps separately show the existing comprehensive plan designation maps, individual constraints used, the land base by buildable area status with aggregated constraints represented, and unconstrained vacant and partially vacant lands by plan designation.

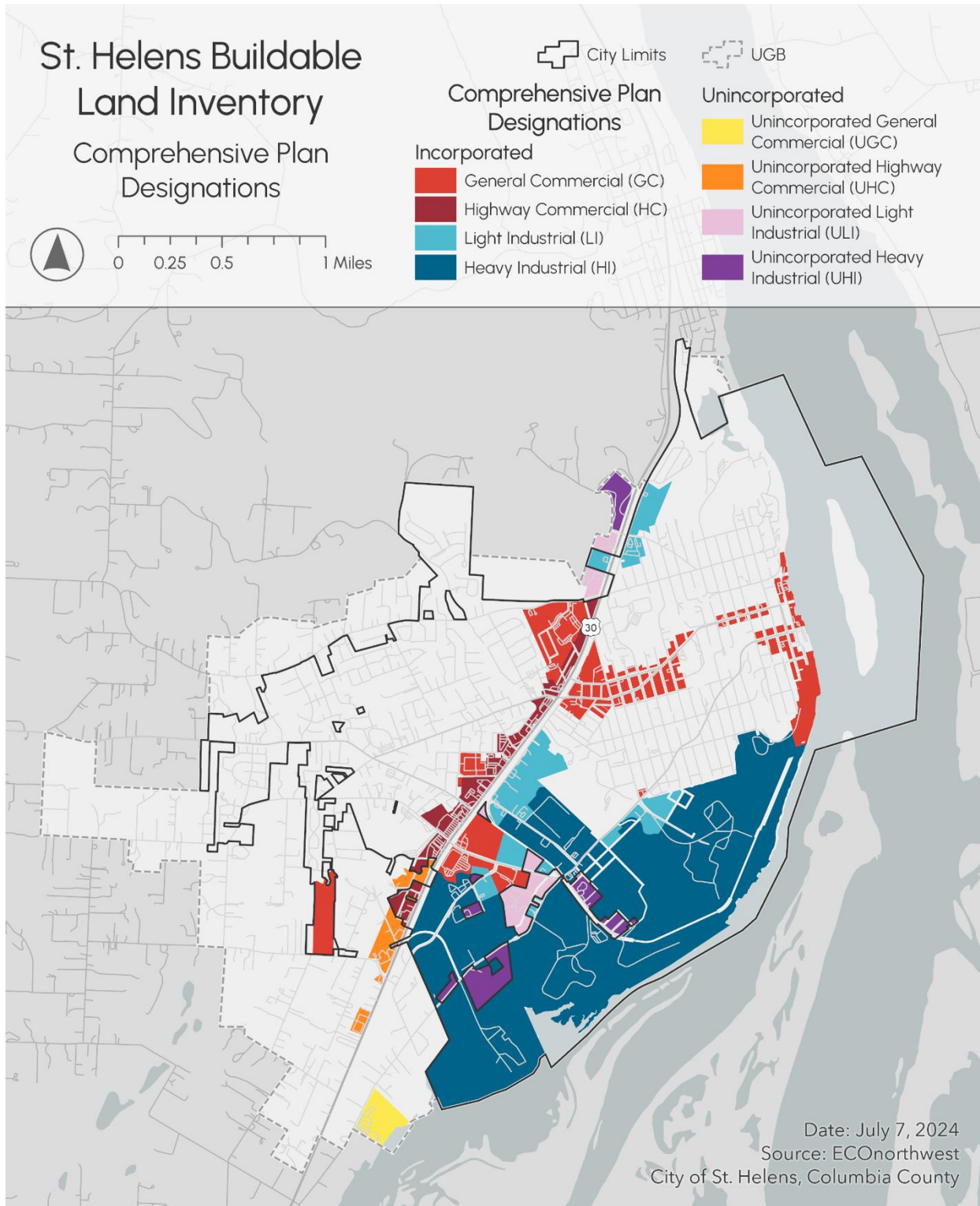
Exhibit 45. Buildable Acres in Vacant/Partially Vacant Tax Lots by Plan Designations, St. Helens UGB, 2024

Plan Designation	Total Buildable Acres	Buildable Acres on Vacant Lots	Buildable Acres on Partially Vacant Lots
Incorporated	280	194	86
General Commercial (GC)	42	30	13
Highway Commercial (HC)	10	8	2
Light Industrial (LI)	46	37	9
Heavy Industrial (HI)	181	119	62
Unincorporated	22	12	11
Unincorporated Highway Commercial (UHC)	6	2	4
Unincorporated Light Industrial (ULI)	5	1	4
Unincorporated Heavy Industrial (UHI)	11	8	3
Total	302	206	96

Source: ECONorthwest analysis, City of St. Helens, Columbia County



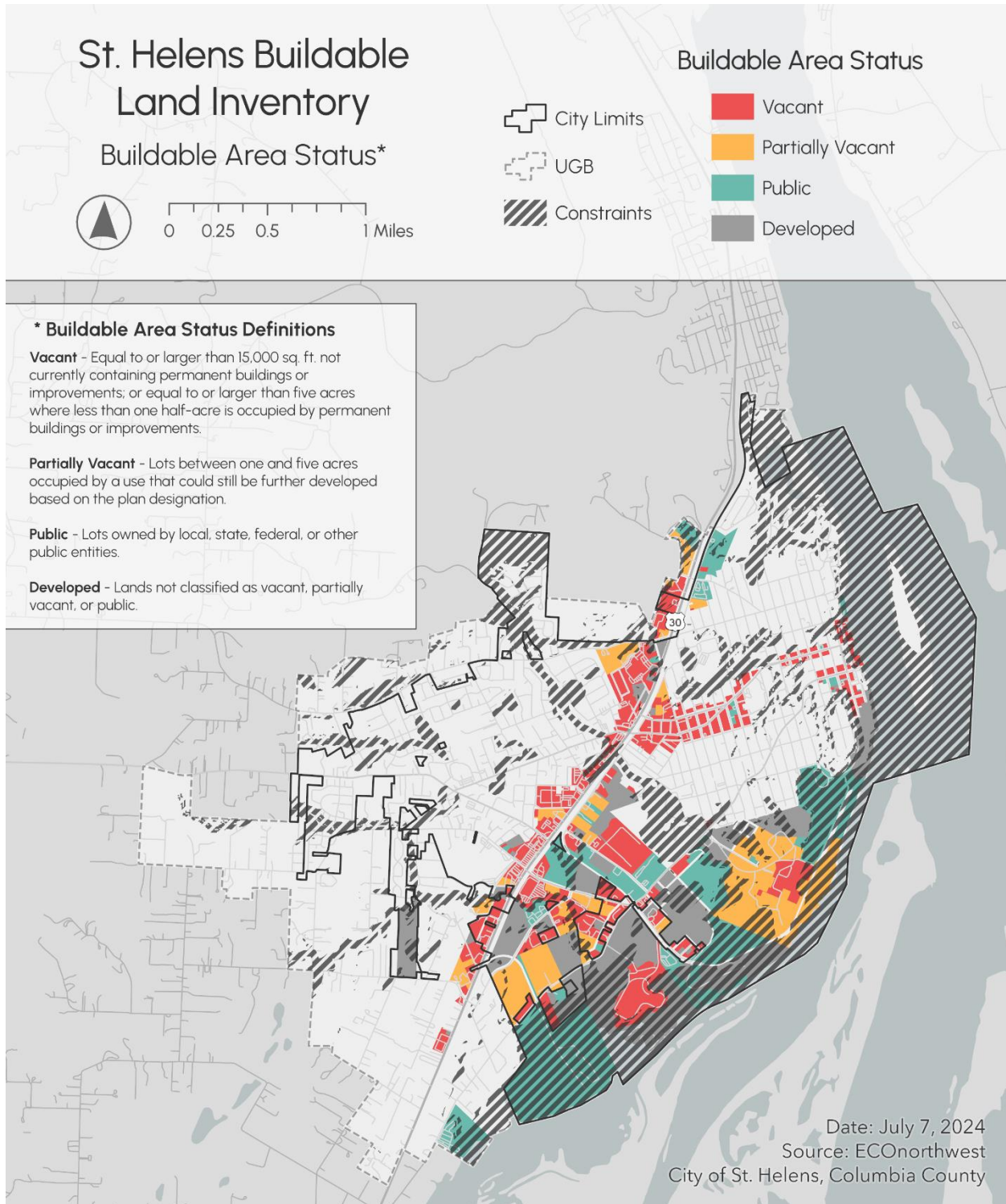
Exhibit 46. Comprehensive Plan Designations Included in the Employment Land Base, St. Helens UGB, 2024



Source: ECONorthwest analysis, City of St. Helens, Columbia County



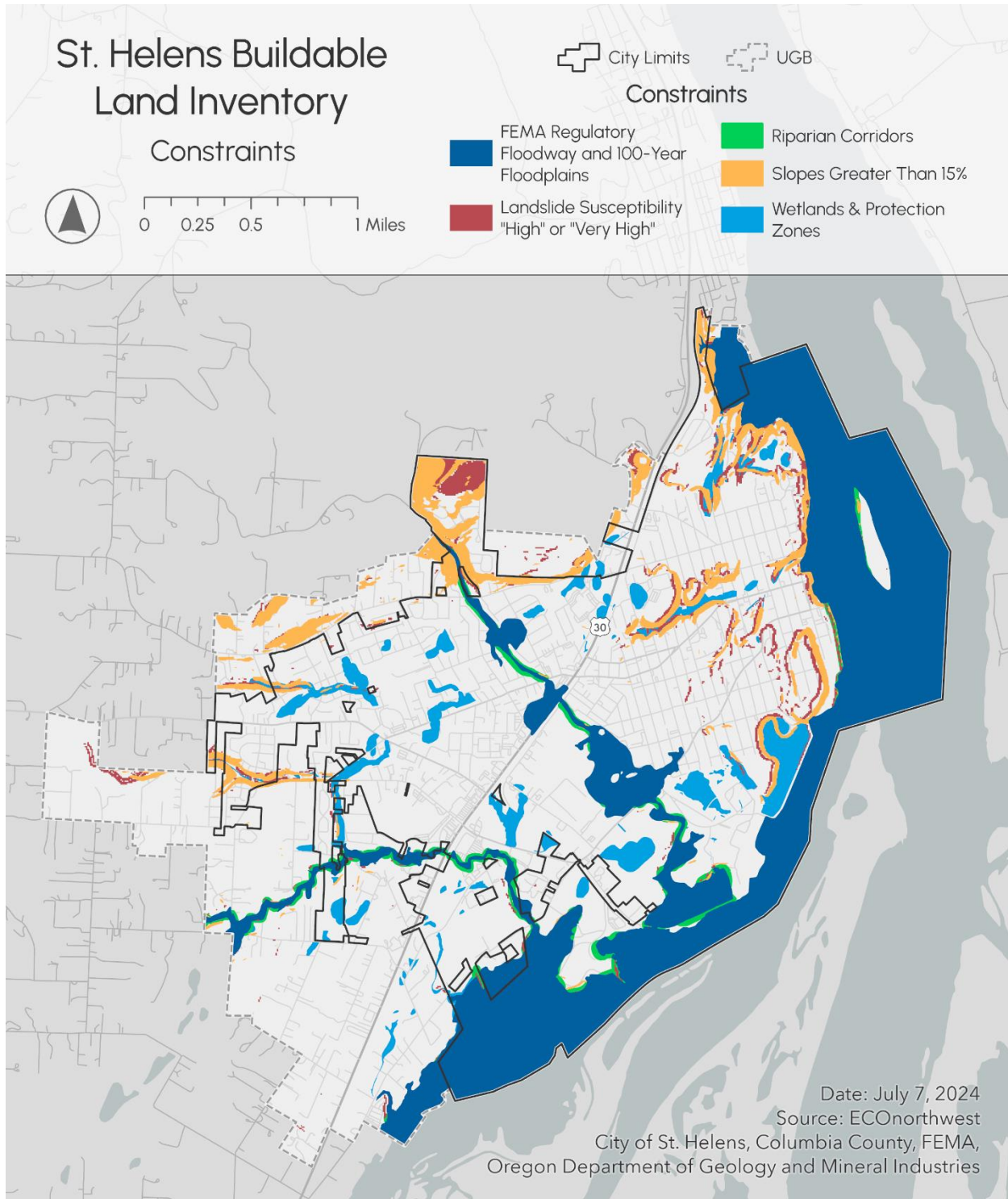
Exhibit 47. Buildable Area Status with Constraints, St. Helens UGB, 2024



Source: ECONorthwest analysis, St. Helens, Columbia County



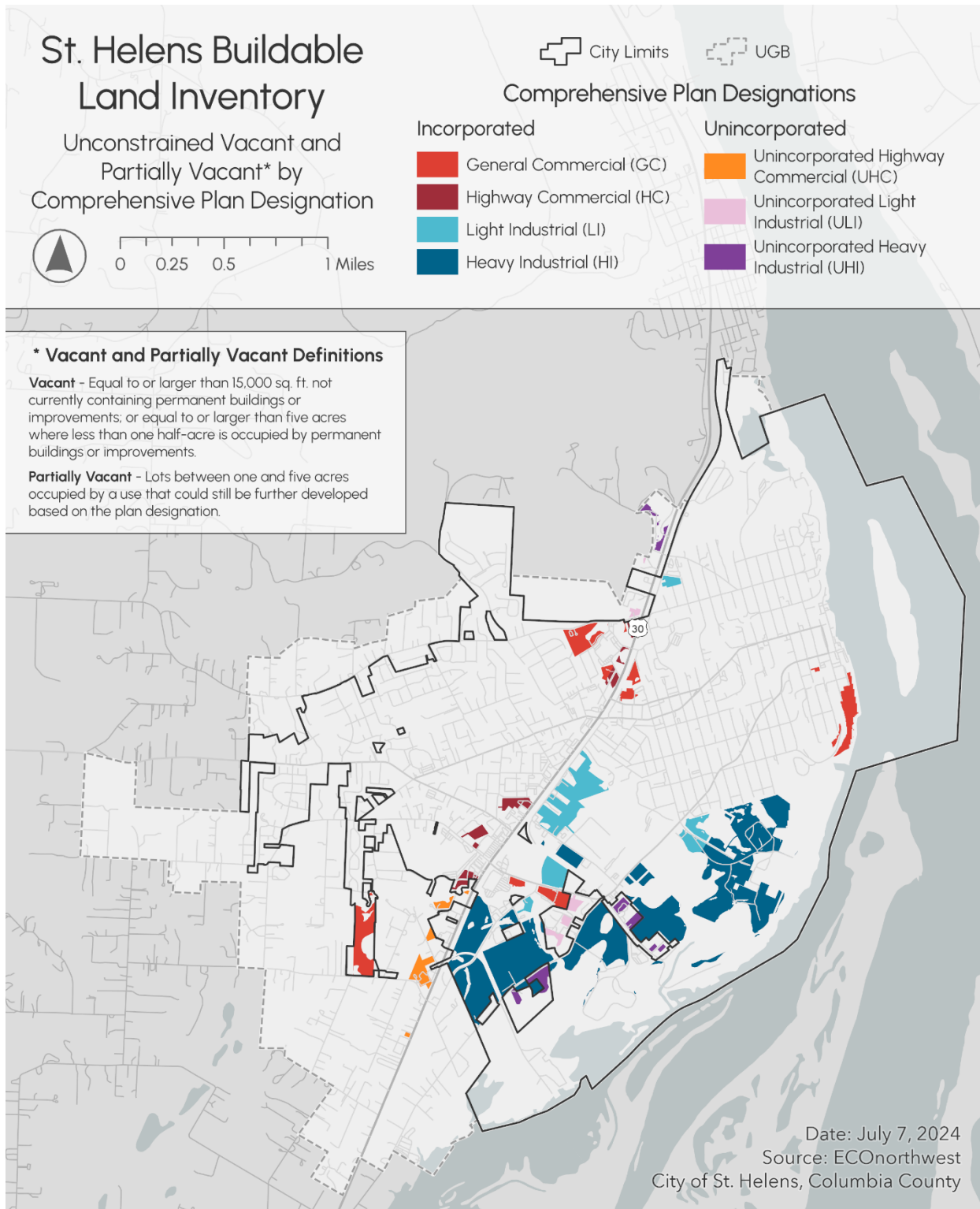
Exhibit 48. Development Constraints, St. Helens UGB, 2024



Source: EConorthwest analysis, City of St. Helens, Columbia County



Exhibit 49. Buildable Employment Land by Plan Designation, St. Helens UGB, 2024



Source: ECONorthwest analysis, City of St. Helens, Columbia County

