



Oregon

Theodore R. Kubongski, Governor

Department of Land Conservation and Development

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NOTICE OF ADOPTED AMENDMENT

8/18/2009

TO: Subscribers to Notice of Adopted Plan
or Land Use Regulation Amendments

FROM: Plan Amendment Program Specialist

SUBJECT: City of Estacada Plan Amendment
DLCD File Number 001-09

The Department of Land Conservation and Development (DLCD) received the attached notice of adoption. A Copy of the adopted plan amendment is available for review at the DLCD office in Salem and the local government office.

Appeal Procedures*

DLCD ACKNOWLEDGMENT or DEADLINE TO APPEAL: Monday, August 31, 2009

This amendment was submitted to DLCD for review prior to adoption. Pursuant to ORS 197.830(2)(b) only persons who participated in the local government proceedings leading to adoption of the amendment are eligible to appeal this decision to the Land Use Board of Appeals (LUBA).

If you wish to appeal, you must file a notice of intent to appeal with the Land Use Board of Appeals (LUBA) no later than 21 days from the date the decision was mailed to you by the local government. If you have questions, check with the local government to determine the appeal deadline. Copies of the notice of intent to appeal must be served upon the local government and others who received written notice of the final decision from the local government. The notice of intent to appeal must be served and filed in the form and manner prescribed by LUBA, (OAR Chapter 661, Division 10). Please call LUBA at 503-373-1265, if you have questions about appeal procedures.

***NOTE:** THE APPEAL DEADLINE IS BASED UPON THE DATE THE DECISION WAS MAILED BY LOCAL GOVERNMENT. A DECISION MAY HAVE BEEN MAILED TO YOU ON A DIFFERENT DATE THAT IT WAS MAILED TO DLCD. AS A RESULT, YOUR APPEAL DEADLINE MAY BE EARLIER THAN THE ABOVE DATE SPECIFIED.

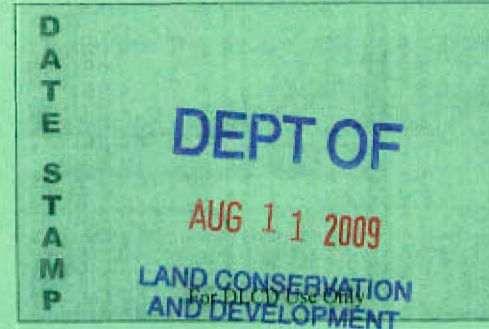
Cc: Randy Ealy, City of Estacada
Gloria Gardiner, DLCD Urban Planning Specialist
Jennifer Donnelly, DLCD Regional Representative
Thomas Hogue, DLCD Regional Representative
Angela Lazarean, DLCD Urban Planner

<paa> YA

NR09

2 Notice of Adoption

THIS FORM MUST BE MAILED TO DLCD
WITHIN 5 WORKING DAYS AFTER THE FINAL DECISION
PER ORS 197.610, OAR CHAPTER 660 - DIVISION 18



Jurisdiction: City of Estacada Local file number: _____
Date of Adoption: 7/13/2009 Date Mailed: 8/10/2009
Date original Notice of Proposed Amendment was mailed to DLCD: 4/6/2009

- | | |
|---|---|
| <input checked="" type="checkbox"/> Comprehensive Plan Text Amendment | <input type="checkbox"/> Comprehensive Plan Map Amendment |
| <input type="checkbox"/> Land Use Regulation Amendment | <input type="checkbox"/> Zoning Map Amendment |
| <input type="checkbox"/> New Land Use Regulation | <input type="checkbox"/> Other: _____ |

Summarize the adopted amendment. Do not use technical terms. Do not write "See Attached".

Update the Economic Development (Goal 9) element of the City's Comprehensive Plan.

Describe how the adopted amendment differs from the proposed amendment. If it is the same, write "SAME". If you did not give Notice for the Proposed Amendment, write "N/A".
No substantial changes.

Plan Map Changed from: _____ to: _____

Zone Map Changed from: _____ to: _____

Location: n/a Acres Involved: 446

Specify Density: Previous: _____ New: _____

Applicable Statewide Planning Goals: 9

Was and Exception Adopted? YES NO

DLCD File No.: 001-09 (17482) [15666]

Did the Department of Land Conservation and Development receive a Notice of Proposed Amendment.....

- Forty-five (45) days prior to first evidentiary hearing? Yes No
If no, do the statewide planning goals apply? Yes No
If no, did Emergency Circumstances require immediate adoption? Yes No

Affected State or Federal Agencies, Local Governments or Special Districts:

none.

Local Contact: Scott Hoelscher Phone: (503) 353-4524 Extension: _____
Address: 9101 SE Sunnybrook City: Clackamas
Zip Code + 4: 97015- Email Address: _____
scotth@co.clackamas.or.us

ADOPTION SUBMITTAL REQUIREMENTS

This form **must be mailed** to DLCD **within 5 working days after the final decision**
per ORS 197.610, OAR Chapter 660 - Division 18.

1. Send this Form and TWO (2) Copies of the Adopted Amendment to:
ATTENTION: PLAN AMENDMENT SPECIALIST
DEPARTMENT OF LAND CONSERVATION AND DEVELOPMENT
635 CAPITOL STREET NE, SUITE 150
SALEM, OREGON 97301-2540
2. Submit **TWO (2) copies** the adopted material, if copies are bounded please submit **TWO (2) complete copies** of documents and maps.
3. Please Note: Adopted materials must be sent to DLCD not later than **FIVE (5) working days** following the date of the final decision on the amendment.
4. Submittal of this Notice of Adoption must include the text of the amendment plus adopted findings and supplementary information.
5. The deadline to appeal will not be extended if you submit this notice of adoption within five working days of the final decision. Appeals to LUBA may be filed within **TWENTY-ONE (21) days** of the date, the Notice of Adoption is sent to DLCD.
6. In addition to sending the Notice of Adoption to DLCD, you must notify persons who participated in the local hearing and requested notice of the final decision.
7. **Need More Copies?** You can copy this form on to 8-1/2x11 green paper only; or call the DLCD Office at (503) 373-0050; or Fax your request to:(503) 378-5518; or Email your request to **mara.ulloa@state.or.us** - ATTENTION: PLAN AMENDMENT SPECIALIST.

ORDINANCE SERIES OF 2009, NO. 3

AN ORDINANCE ADOPTING CHANGES TO THE COMPREHENSIVE PLAN
OF THE CITY OF ESTACADA

The City of Estacada ordains as follows:

Section 1. The City of Estacada Economic Opportunity Analysis, prepared by Cogan Owens Cogan, LLC, dated June 15, 2009, is hereby adopted to amend the Goal 9 Economic Development element of the City of Estacada Comprehensive Plan, including an updated Economic Development vision, goals and technical analysis identifying the 20-year need for employment lands for the City of Estacada.

Considered at the Council meeting of June 22, 2009, passed by a vote of 5 ayes and 0 nays, and considered for the second time at the meeting of July 13, 2009 and passed by a vote of 6 ayes and 0 nays, this 13th day of July, 2009.

Duly passed by the City Council this 13th day of July 2009.

Becky Arnold
Mayor

ATTEST:

Denise Carey
City Recorder

City of Estacada

Economic Opportunity Analysis

Final Report
June 15, 2009



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Acknowledgements

This project was made possible in part by financial assistance provided by the **Oregon Department of Land Conservation and Development**.

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Randy Ealy, City Manager
Denise Carey, Interim City Manager

Clackamas County

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Introduction

The City of Estacada is updating the Economic Development (Goal 9) element of their Comprehensive Plan. Cogan Owens Cogan, LLC (COC) and Marketek, Inc. are conducting an Economic Opportunity Analysis (EOA) in accordance with Oregon Administrative Rule (OAR) 660-009-0015, and the Oregon Department of Land Conservation and Development's (DLCD) Goal 9 guidelines. A citizen-based Advisory Task Force helped guide the work of this effort.

Overview and Organization of this Report

The EOA is a framework for defining an economic direction for the City of Estacada, including identifying existing and emerging economic opportunities within the City of Estacada's Urban Growth Boundary (UGB).

The EOA examines key issues and trends to assess Estacada's economic development potential, projects employment growth in key industries, and determines short- and long-term demand for employment land. This demand is compared to an inventory of suitable commercial and industrial properties (supply) to assess the sufficiency of immediate and longer term (20-year) supply of commercial and industrial employment land in the City's UGB.

The City of Estacada is working to define itself as the place in the east Clackamas County region to provide short term, buildable large lot industrial land. The shortage is indicated by recent mapping undertaken by Clackamas County, and is well-acknowledged regionally.

As a step on the path to implementing this vision, the City acknowledges the need to conduct several things:

- Refine its industrial land inventory. This includes rezoning areas that the City does not intend to serve for employment use (water, sewer, transportation).
- Provide clear policy and regulatory direction toward preserving the remaining industrial land and new industrial lands added to the urban growth area.
- Assist in the assembly and service of parcels for commercial development and redevelopment. The City acknowledges two types of needed commercial lands: a) small parcel commercial parcels in the downtown area and b) larger lot commercial parcels to help fill subregional retail needs.
- Provide for a better jobs-housing balance locally.

The organization of this report is as follows:

- **Vision and Goals.** This section provides an updated economic vision for the City of Estacada and a series of goals to achieve that vision. These goals become the basis for policy statements for the City's Comprehensive Plan.
- **Economic Trends.** This section provides an overview of national, state and local economic trends affecting Estacada, including population projections and expected employment growth.
- **Target Industries.** This section examines Estacada's economic assets and opportunities, and relates them to target industrial sectors for economic development.
- **Land Demand.** This section examines projected demand for industrial and commercial land based on anticipated employment growth rates in key target industries.
- **Site Suitability Analysis.** This section summarizes the nature of development that is likely to be attracted to the range of commercial and industrial sites expected to develop in Estacada over the next 20 years.
- **Existing Industrial and Commercial Supply.** This section provides an inventory of suitable existing industrial and commercial land (employment land) within the City of Estacada's UGB.
- **Conclusions.** This section compares short- and long-term demand for employment land to the existing supply inventory to determine a 20-year surplus or deficit of suitable land.
- **Appendix.** This section provided accompanying tables to various sections of this report.

Economic Development Vision and Goals

In accordance with OAR 660-009-0015(5), this section summarizes the City's economic development vision, goals, policies and objectives. They were developed based upon consultation with members of the project Advisory Task Force (ATF), city, county and state agency representatives and other stakeholders.

Vision

The City of Estacada has a diverse and thriving business sector based upon the city's manufacturing base and proximity to rich natural resources. Our actions increase employment, help retain, recruit and grow local businesses, maintain and enhance livability, and improve quality of life of Estacada's residents.

Economic Development Goals

The economic development goals of the City of Estacada are as follows.

The City of Estacada shall...

- Focus industrial development on employment lands that are serviceable, accessible and marketable to diverse industries.
- Invest in capital improvements and regulatory measures to support employment areas.
- Provide adequate industrial land opportunities to grow existing businesses and attract a diversity of new industries.
- Retain suitable industrial land for industrial purposes.
- Limit retail and other potential conflicting uses in industrial zones to support industrial area businesses.
- Attract new opportunities such as healthcare, tourism, and clean industries, including those utilizing green building practices and a focus on sustainable use of natural resources.
 - Support decentralized, renewable district energy generation and use and other green building practice solutions.
 - Maintain and enhance the local labor pool through workforce development opportunities with Clackamas Community College and other universities such as Portland State University and University of Oregon (Portland Campus).
 - Support a diverse and skilled workforce who is capable of providing services to the green and sustainable industry sectors.
- Position Estacada as a supportive and responsive business environment.

- Create opportunities to increase tourism, overnight stays and recreation-based opportunities.
- Continue the investment in downtown as a walkable, mixed use district that includes residential opportunities.

Community Economic Development Objectives

The following are community economic development objectives for the City of Estacada identified through consultation with members of the project Advisory Task Force, City, County and state agency representatives and other stakeholders in accordance with OAR 660.009.0020(1)(a):

Preliminary Community Economic Development Objectives

- Diversify the local economy; attract new opportunities such as healthcare, tourism and “clean” industries, including those utilizing green building practices and sustainable natural resources.
- Provide adequate industrial land opportunities to grow existing businesses and attract a diversity of new industries.
- Create opportunities to increase tourism, overnight stays and recreation-based opportunities.
- Attract unique, local commercial development opportunities to Downtown.
- Improve quality of life, such as providing for a range of housing and income types.
- Maintain and enhance the local labor pool through workforce development opportunities with Clackamas Community College, Marylhurst and other universities such as Portland State University and University of Oregon (Portland Campus).

Relation to other Economic Development Efforts Underway

To further Estacada's economic development goals and objectives, the City has been taking several proactive steps including:

- **Downtown Urban Renewal Plan (2007).** This plan establishes an urban renewal district and plan for creating improvements in downtown Estacada. The District is currently in effect.
- **Health Care/Urgent Care Feasibility Study (2007).** This study analyzes Estacada's competitive position in attracting health care facilities to Estacada.
- **Estacada Community Tourism Action Plan (Updated 2007).** This plan establishes clear actions for various organizations to improve tourism in Estacada.
- **Estacada Main Street Program Plan (2008).** This strategy establishes strategies for focusing commercial development opportunities in an effort to revitalize downtown Estacada.
- **Transportation Enhancement (TE) Grant (2008).** This grant provides funding for designing and implementing improvements to transportation features along the Hwy 212/224 corridor and will direct attention for downtown Estacada. Improvements are underway.
- **Transportation and Growth Management (TGM) Outreach Workshop (2008).** Hired a team of consultants to analyze and describe Estacada's attributes and opportunities for a healthy, vibrant downtown area that serves residents, businesses and responds to the City's vision for future growth.
- **Retail Market Analysis (2009).** Created a Retail Business Development Action Plan that directly addresses Estacada's desire to have a strong and vital downtown. This retail market analysis and business development plan was prepared as part of the Next Steps Strategy for downtown developed in partnership with the Estacada Main Street Program.

Economic Trends

National Overview

The economic outlook for metropolitan Portland, Clackamas County and the City of Estacada are inextricably tied to those of the United States and the global marketplace. As a wave of negative signs gather force in the US, policy makers and investors are debating just how much the national economy could be affected in upcoming years. Underpinning much of the economic slowdown is the housing market, which is a year and a half into its response to the mortgage lending crisis and increases in home foreclosures. Other recent worries, including rising energy costs, increases in unemployment, tepid job growth, skittish stock markets and declines in consumer spending, point towards a national economy in recession.

The Bureau of Labor Statistics (BLS) tracks economic growth within the US and prepares 10-year growth forecasts based on a general view of the national economy, labor force growth rates, unemployment assumptions, exports and imports, consumer spending and other economic variables. Major trends reported by the BLS include:

- An anticipated annual employment increase of 1.0% through 2016, compared to 1.2% during the 1996 to 2006 time frame. Growth expected to be concentrated in service sectors, with the greatest growth in professional and business services, health care and social assistance. By 2016, service jobs are projected to account for more than three-quarters of all jobs.
- Increase in unemployment from 5.7% in July to 6.1% in August 2008—the highest unemployment rate since September 2003. Continued decline in non-farm payroll employment throughout 2008.
- Manufacturing sector expected to lose 1.5 million jobs by 2016, compared to a decrease of 3.0 million jobs from 1996 to 2006.
- Civilian labor force expected to grow by 12.8 million persons to reach 164.2 million by 2016. This increase is below that seen from 1996 to 2006, when the civilian labor force grew by 17.5 million.
- Aging "baby boom" population (persons born between 1946 and 1964) adding to the share of labor force over the age of 55 over the next 10 years. Increasingly diverse labor force as share of Hispanics, Asians and African Americans grow through 2016.

Regional Overview

Three economic regions make up the West Coast, including the Pacific Northwest (Seattle and Portland in the US and Vancouver, British Columbia), Northern California (San Francisco/Oakland) and Southern California (Los Angeles). Although the Pacific Northwest is the smallest in terms of population and economy, its economic growth rate during the 1990s, as measured by Gross

Metropolitan Product (GMP), was nearly double that of other West Coast regions. In 2004, the combined GMP for the region was estimated at \$254.4 billion and made up 16% of GMP for the West Coast.

The Portland-Vancouver Metropolitan Statistical Area (MSA) serves as the southern anchor of the Pacific Northwest economic region and ties the Seattle metro area to the Northern California region. Portland area seaports serve as access points to the region's agricultural products and as connections to overseas markets. As the Asian, Indian and Middle Eastern economies grow, this link is likely to become increasingly important.

Like the national economy, the Portland-Vancouver MSA has seen higher unemployment levels over the last year. The Oregon Employment Department estimates unemployment in the MSA at 5.6% as of July 2008, up from 5.3% in June 2008 and 5.0% in July 2007. This rate, however, remains below that of the state (5.8%) and nation (5.7%) for July 2008. As of December 2007, Clackamas County was metro Portland's fastest growing county, accounting for nearly 30% of recent job growth, especially in professional and business services and manufacturing, per the Employment Department.

Recent development and economic trends in the Portland MSA include:

- In terms of single family residential development, Portland State University's (PSU) Real Estate Center reports Portland has fared well through the recent downturn when compared to other housing markets. Median sales prices for new and existing homes increased by 1.0% and 8.2%, respectively, from the third quarter of 2006 to the third quarter of 2007. However, the numbers of sales and building permits issued declined.
- As of 2007, the market held just over 40 million square feet of rentable office space, roughly evenly distributed between downtown and suburban submarkets. From 2006 to 2007, there was an increase in lease rates, absorption rates and construction activity and a decrease in the vacancy rate, according to CB Richard Ellis.
- In 2007, PSU Real Estate Center reports 407,000 square feet of office space under construction in downtown Portland, primarily in mixed-use buildings. However, PSU's 3rd quarter 2007 Office Market Report notes that speculative office construction has stalled downtown as developers are unable to meet pre-leasing requirements.
- As of 2007, industrial/flex space in metro Portland totaled just under 58 million square feet. Port of Portland and metals and transportation equipment manufacturing industries and related suppliers create a "hub and spoke" structure in the region. Other local manufacturing specialties include semiconductors and wood products.
- To meet growing demand for industrial space, Metro (Portland's regional government) expanded the urban growth boundary in 2002 and 2004 to add about 4,000 acres and again in 2005 to add 345 acres of industrial land. Further, in June 2007, the Oregon Legislature passed a measure

enabling Metro and local governments to target additional areas outside the UGB for future expansion over the next 50 years. The associated urban and rural reserve process is currently underway. That study area extends to the edge of Estacada's UGB.

- With limited industrial land available for development, users looking for large facilities (65,000 square feet or more) are having difficulty finding space. According to the Portland Business Journal, demand for large space is being bolstered as national retailers increase their number of distribution centers in an effort to reduce transportation expenses in light of rising fuel costs. Further, Norris, Beggs & Simpson explain that the typical size of warehouse space is on the rise. In 2002, the average size for warehouse space being constructed was 120,000 square feet; as of 2006, the average reached 216,000 square feet. Coupled with a preference for higher ceilings, this desire for large space makes it difficult for new users to move into existing industrial buildings.
- Within the tri-county (Clackamas, Multnomah, Washington) area, there are only 13 state-certified, ready-to-go industrial sites. Of those, only four are 100 acres or larger pointing to the short supply of large industrial properties. Clackamas County has only two certified sites: Pioneer Industrial Park in Canby and Avison Millsite in Molalla.

Clackamas County Economy

The *Clackamas County Economic Landscape* report identifies three market regions within the county, including the Mt. Hood Recreational Area, rural Clackamas County (Sandy, Canby, Estacada and Molalla areas) and urban Clackamas County (Lake Oswego/West Linn, Oregon City, Milwaukie, Happy Valley/Damascus and Wilsonville areas). These distinct regions give Clackamas a diverse economy and workforce, with tourism and natural-resource related employment providing a strong base. According to the 2002 USDA Census of Agriculture, the county is one of the top agriculture producing counties in the US and a top-ten producer of nursery/greenhouse/floriculture/sod products, Christmas trees, hazelnuts and horses and ponies.

The Portland-Metropolitan area regional planning agency, Metro, projects that Clackamas County will capture 21% of metro job growth over the next 20 years. As of 2007, the county was home to 10% of the metro's vacant industrial and commercial land (1,618 acres). Newly urbanizing areas including Damascus, Beavercreek and Wilsonville are expected to absorb much of this new development. Rural Clackamas has 491 acres of the county's vacant commercial and industrial land.

Selected major developments and public improvements underway or planned for Clackamas include:

- I-205 light rail line from Gateway to Clackamas Town Center;

- Public improvements including road improvements on I-205, 172nd Avenue, Sunnyside Road, Stafford/Borland intersection and Evelyn/Jennifer intersection and improvements to Sandy River bridge and Molalla River bridge;
- Kruse Way office buildings adding 200,000 square feet of office space;
- Clackamas Town Center expansion with 250,000 square feet of retail, restaurant and cinema space;
- Clackamette Cove Village, a mixed-use project with housing, commercial and office space in Oregon City;
- Villebois Village in Wilsonville, a European-inspired community with homes, parks, trail, an elementary school and a village center;
- Sunrise Corridor, connecting I-205 and Highway 26, with accelerated effort focused on Phase 1 (I-205 to Hwy 212/224 intersection); and
- Rivers Project lifestyle shopping center in Oregon City.

Population & Employment Trends

Population Trends

Demand for new office, commercial, residential and institutional development and for additional public infrastructure is typically driven by population and employment growth. The socio-economic trend analysis focuses on the City of Estacada as the project study area due in part to the availability of sound current and trended data, comparable to Clackamas County and the State of Oregon as well as Estacada's somewhat remote rural location. The Eagle Creek industrial area is taken into consideration, however, in anticipating future employment growth.

Table 1 below displays population growth in the City of Estacada, Clackamas County and the State of Oregon since 1990. As shown, the City of Estacada had an estimated 2,695 persons as of 2007, up from 2,016 in 1990. From 1990 to 2000, the average annual population growth rate in Estacada was 1.76%, below that of Clackamas County (2.14%) and the state (2.04%). From 2000 to 2007, however, Estacada's average annual population growth rate of 1.95% surpassed that of the county (1.43%) and state (1.35%).

Table 1
POPULATION GROWTH
City of Estacada, Clackamas County and State of Oregon
1990 to 2007

Geographic Area	Avg. Ann. Change 1990-2000				Avg. Ann. Change 2000-2007		
	1990	2000	Number	Percent	2007 (Estimate)	Number	Percent
City of Estacada	2,016	2,371	36	1.76%	2,695	46	1.95%
Clackamas County	278,850	338,391	5,954	2.14%	372,270	4,840	1.43%
State of Oregon	2,842,321	3,421,399	57,908	2.04%	3,745,455	46,294	1.35%

Source: Census 1990 and 2000; Portland State University Population Research Center

Table 2 provides a demographic snapshot of the City of Estacada with comparisons to Clackamas County and the State of Oregon. The population profile presented here tracks closely with the information shared about Estacada on the Oregon Prospector, the state's web site for those interested in relocating or expanding a business in Oregon. Key trend information follows.

- Current and historical median household income and per capita income in Estacada are below those of the county and state. Estacada median household income in 2008 is \$52,314 and per capita income is \$25,973. Although below county and state income levels, both have increased at rates above those of the county and state from 1990 to 2000 and from 2000 to 2008.

- The Estacada population is slightly younger than Clackamas and Oregon populations, with median ages of 34.7 years, 39.6 years and 38.0 years, respectively.
- Educational attainment is lower in Estacada than in Clackamas and Oregon. Twelve percent (12.4%) of persons age 25 and up have four year degrees or more and 6.7% have associate degrees.
- Migration trends are similar across the city, county and state. As of 2000, just over half of households moved within the last five years (from 51.5% in Clackamas to 55.7% in Estacada).
- Average travel time to work in Estacada was 27.7 minutes in 2000, slightly above the county average (26.2 minutes) and the state (22.2 minutes).
- The percentage of the Estacada population living in poverty in 2000 was 12.4%, above that of the state (10.8%) and the county (6.1%). The poverty line is based on household type and size and, in 2000, was \$17,463 for a family of four.

Table 2

DEMOGRAPHIC SNAPSHOT
City of Estacada, Clackamas County and State of Oregon

Demographic Indicator	City of Estacada	Clackamas County	State of Oregon
Median Household Income			
1990	\$22,450	\$35,419	\$27,250
2000	\$38,609	\$52,315	\$40,947
2008	\$52,314	\$67,406	\$52,474
% Change ('90-'00)	72.0%	47.7%	50.3%
% Change ('00-'08)	35.5%	28.8%	28.2%
Per Capita Income			
1990	\$10,373	\$16,360	\$13,418
2000	\$17,049	\$25,973	\$20,940
2008	\$25,973	\$33,563	\$27,198
% Change ('90-'00)	64.4%	58.8%	56.1%
% Change ('00-'08)	52.3%	29.2%	29.9%
Median Age (2008)	34.7	39.6	38.0
Educational Attainment (2008)			
Four Year Degree or More	12.4%	30.7%	27.4%
Associate Degree	6.7%	7.7%	7.4%
Moved from 1995 to 2000 (2000)	55.7%	51.5%	55.2%
Average Commute Time (2000)	27.7 min	26.2 min	22.2 min
Below Poverty Line (2000)	12.4%	6.1%	10.8%

Source: ESRI BIS

Employment Trends

Demand for new office and industrial space is generated by increases in employment, whether by existing local businesses expanding and adding workers or by business relocations or start-ups.

According to the Oregon Employment Department (OED), there were 144,190 non-farm employees in Clackamas County in 2006 (see Table 3). Sectors with the most employment in 2006 included Trade, Transportation and Utilities (33,590 jobs or 23.3%), Manufacturing (18,370 jobs or 12.7%) and Government (17,140 jobs or 12.7%). Separately, OED reports that in 2007, Clackamas County was home to 183 crop production businesses employing 4,151 employees, including nurseries and tree farms.

In Clackamas County, employment is expected to grow at an average annual rate of 1.4%, reaching 20,870 by 2016. Figure 1 provides growth by economic sector for Clackamas County and shows the following highest growth sectors and expected job increases:

- Trade, Transportation and Utilities – 4,780 new jobs
- Education and Health Services – 4,590 new jobs
- Professional & Business Services – 3,640 new jobs
- Leisure & Hospitality – 2,180 new jobs

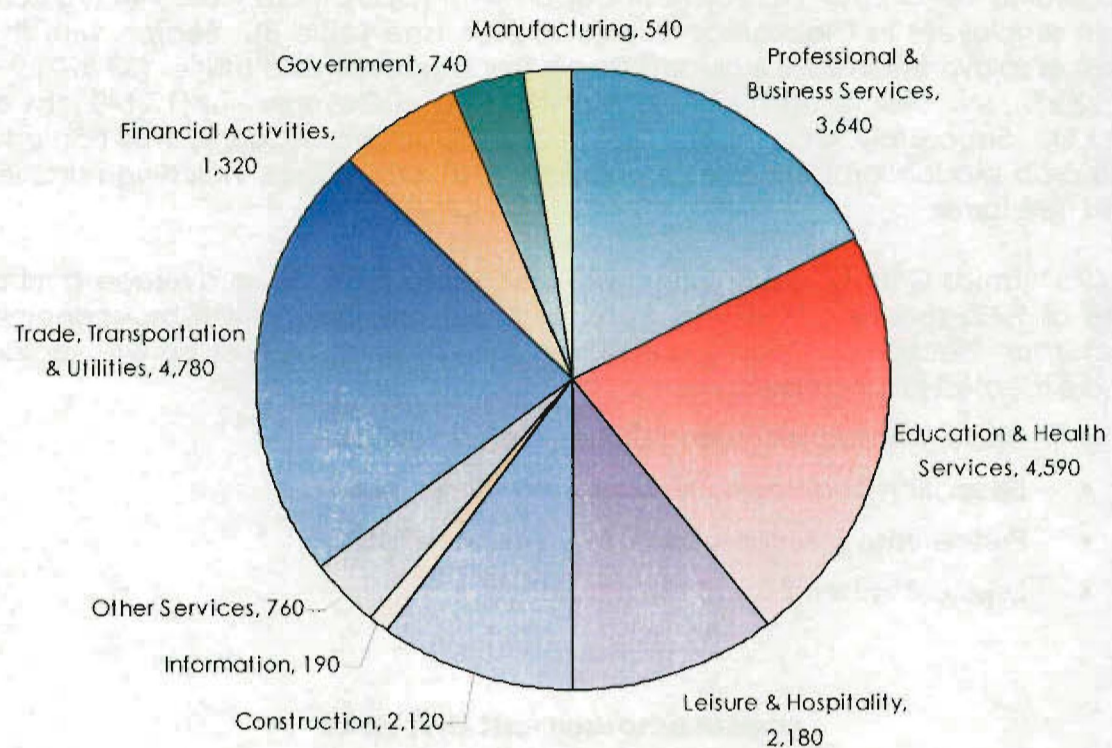
Table 3

NONFARM EMPLOYMENT FORECAST BY SECTOR
Clackamas County
2006-2016

Employment Sector	2006	2016	Change	Avg. Ann. % Change
Professional & Business Services	16,490	20,130	3,640	2.2%
Education & Health Services	16,330	20,920	4,590	2.8%
Leisure & Hospitality	13,040	15,220	2,180	1.7%
Construction	11,920	14,040	2,120	1.8%
Information	1,700	1,890	190	1.1%
Other Services	5,180	5,940	760	1.5%
Trade, Transportation & Utilities	33,590	38,370	4,780	1.4%
Financial Activities	10,260	11,580	1,320	1.3%
Government	17,140	17,880	740	0.4%
Manufacturing	18,370	18,910	540	0.3%
Natural Resources & Mining	170	180	10	0.6%
Total Non-form Employment	144,190	165,060	20,870	1.4%

Source: Oregon Employment Department

Figure 1
FORECASTED EMPLOYMENT GROWTH BY SECTOR
Clackamas County
2006-2016



Source: Oregon Employment Department

in Estacada, nonfarm employment was estimated at 876 in 2004, according to the US Census and Oregon Employment Department. Educational Services made up 36% of Estacada employment, followed by Retail Trade (18.3%) and Accommodation and Food Services (8.8%). A 2008 employment summary from ESRI Business Information Solutions estimates 1,412 jobs in the Estacada/Eagle Creek area. Table 4 on the following page provides a list of top employers in the Estacada/Eagle Creek area.

Table 4
LOCAL EMPLOYMENT BASE
Largest Employers
2008

Employer	Type	Number of Employees Full Time Equivalent (FTE)
Estacada School District	Education	203 FTE 80 part time
Eagle Foundry	Manufacturing: Metals	91
Reliance Connects/Cascade Utilities	Communications/utilities: Broadband, TV, Telephone	67
Northwest Technologies	Manufacturing: Metal Fabrication	60
PGE	Faraday Dam/Westside Hydro	50
Clackamas River Ranger District	Forestry Services	30 FTE + seasonal
Seuberl Manufacturing	Machine shop	40
Supply Solutions/North Coast Electric	Wholesale: Electric Supply	20
Thriftway	Retail	30

Source: Marketek

According to Metro's *Employment Demand Factors & Trends, Task 1 Draft Report* released in January 2009:

- Distribution of regional employment is shifting, with metro Portland's center and inner ring areas losing jobs, while outer ring geographies, including Estacada, are growing in employment.
- Of the nine submarkets identified in the report, the "Outer Clackamas" area, which includes Estacada, made up 2% of jobs (20,167 jobs) in metro Portland as of 2006.
- From 2000 to 2006, six of the nine submarkets saw increases in employment, while the remaining three saw declines. Within these six submarkets, 40,417 new jobs were added. The Outer Clackamas area increased by 1,717 jobs, making up 4% of new jobs within the six submarkets seeing job growth. This increase translates to an average annual employment increase of 1.6% in Outer Clackamas.

Economic Assets, Opportunities and Challenges

Interviews with eight Estacada industrial business owners, multiple site visits and the professional observations of the Estacada EOA consultant team provided insight and perspective to the synopsis of Estacada's economic strengths and weaknesses in the table below.

According to interviewees, although a host of factors influence the decision process for business expansion and attraction, among the key considerations are:

- Location and proximity to customers
- Labor costs and skills
- Business climate
- Industrial buildings and sites
- Size of community
- Transportation access
- Infrastructure
- Cost of doing business

Physical Attributes	
Assets/Opportunities	Issues/Challenges
Scenic setting in the foothills of Cascades.	Access is limited compared to many other potential industrial locations within the metropolitan Portland area: no interstate, rail or water transportation; an estimated 30 miles from downtown Portland and 19 from I-205.
Clackamas River parallels Highway 211 / 224 through downtown. The current Transportation System Plan (TSP) outlines adequate transportation to accommodate planned growth.	Businesses highly dependent on truck transportation or access to a freeway may perceive Estacada and other east Clackamas communities are remote.
Water and sewer capacity is sufficient to accommodate planned growth.	Certain areas of the city do not have sewer and water-related capital improvements planned to accommodate employment-related industrial development. City is considering rezoning those areas.
Business Climate	
Assets/Opportunities	Issues/Challenges
Local workforce is viewed as plus; Clackamas Community College is receiving a grant to provide on-site training to Estacada industrial businesses.	Attracting employees from Portland area is difficult; the commute is perceived by some interviewed to be significant.

Relatively low land/lease/construction costs Warehouse space is \$0.55-\$0.60 SF NNN.	Limited 'ready' marketable industrial sites or buildings; no certified sites.
Business Climate (continued)	
Assets/Opportunities	Issues/Challenges
Pro-business, cooperative local government offering streamlined building permit and inspection process; community leadership overall is plus.	
Residential population and visitor market growth with 10,000 average daily vehicle traffic on Hwy 212/224.	Relatively small population base and workforce, though Estacada School District is home to an estimated 18,000 residents.
Served by electric (PGE) local telephone company, Reliance Connects and DSL/cable.	No natural gas provider.
Enterprise Zone and Urban Renewal District in place.	59 enterprise zones exist statewide, lessening the competitive advantage they offer.
Future Sunrise Corridor development will help connect Estacada to highway system.	Limited transportation and market access.
Business investment is occurring; numerous home-grown businesses.	Limited availability of industrial land or buildings for expansion.
Business Base: Commercial and Industrial	
Assets/Opportunities	Issues/Challenges
Retail leakage is estimated at \$5.3 million w/in city limits, creating opportunities to fill niches. Identified targets include: outdoor gear, apparel and supplies and major grocery.	Small population base (2,735) and large number of people commuting to work out of town, taking their spending potential to other communities; retail competition in metro area.
Relatively diverse economic base—utilities, metals, wood products, forestry, agriculture and nursery products with private employment comprising 70%+ of the total.	Limited land for large scale commercial and industrial expansion. Urban Renewal District will help focus on infill opportunities downtown.
Employment base is expanding, growing from 1,623 ('02) to 1,860 ('06). (Refer to Table 4)	Some important services are missing. Limited medical with only two physicians and two dentists.
Many home-grown businesses whose owners enjoy the friendly, rural lifestyle.	Workforce recruitment for higher skilled/management jobs challenging; Estacada viewed as geographically distant.
Good base of hospitality services. Recreational tourism growth potential. Planning for public boat launch/access to Clackamas County River is under way to attract more visitors.	More overnight lodging is needed to capture more visitor spending.
Limited industrial land and buildings for business location or expansion. Small to mid-size parcels and building space (<5,000 SF) are in greatest demand.	Limited availability of ready industrial land or buildings with infrastructure for expanding businesses.
Metals-metal working cluster; strong forest/agribusiness industry including forest products, nursery crops, Christmas trees, boughs, mushrooms, etc.	More diverse job opportunities desired.

Quality of Life	
Assets/Opportunities	Issues/Challenges
Historic downtown has made positive gains in terms of physical improvements and business mix and with Urban Renewal District in place.	Creation of unlimited planned commercial clusters on Hwy 212/224 may dilute downtown's strength as a concentrated node and introduce auto-dependent, highway-oriented development.
Large, diverse artist base provides creative capacity and resources to the Estacada community.	
Highly scenic forested area; gateway community in the Clackamas River Canyon; numerous outdoor recreational options (e.g., hunting, fishing, canoeing/rafting, disc golf, kayaking, biking/cycling, hiking) and beginning/ending of West Cascade Scenic Byway.	
Affordable cost of living—median housing costs are considerably lower than Clackamas County overall: \$254,942, Estacada vs. \$369,030 Clackamas County.	

Target Industries

Clackamas County Business Clusters

The Clackamas County Economic Landscape identifies major business clusters in the county. High-wage business clusters (i.e., those paying an average wage of at least \$37,800) in Clackamas were classified based on location quotients (prevalence in Clackamas compared to prevalence statewide) and projected employment growth. Classifications included: (1) "stars" with high location quotients (LQs) and high projected employment growth; (2) "opportunities" with low LQs but high projected growth; (3) "mature" with high LQs but low growth projections and (4) "challenged" with low LQs and low projected growth.

Business clusters considered stars include Professional and Business Services, Transportation and Warehousing and Wholesale Trade – Durable Goods. Top opportunity clusters were Health Care/Education and Arts and Entertainment. Table 5 provides the findings of this research.

Table 5

CLACKAMAS COUNTY HIGH-WAGE BUSINESS CLUSTERS

Star Clusters – High LQ, High Growth	Opportunity Clusters – Low LQ, High Growth
Professional Business Services Transportation & Warehousing Wholesale Trade – Durable Goods	Health Care Arts & Entertainment Construction Utilities
Mature Clusters – High LQ, Low Growth	Challenged Clusters – Low LQ, Low Growth
Metals Manufacturing High Tech Plastics Manufacturing Mineral Products Paper Manufacturing	Federal Government Miscellaneous Manufacturing Information Finance, Insurance & Real Estate

Estacada Targets

Identifying Estacada's target industries over the next 20 years should reflect a combination of community goals and aspirations, the current local and county employment base and Estacada's assets and challenges. While not insurmountable, transportation access and the availability of ready sites are the two most critical challenges facing Estacada's industrial growth. A synopsis of Estacada's industrial and commercial targets follows.

Industrial Targets:

- Specialty contractors and construction firms including green construction and services, cabinet-makers, small custom-design wood worker, electrical, plumbing, HVAC and other contractors.

- Manufacturing particularly related to metals manufacturing and green building and clean technology (energy, transportation, materials, water). Smaller companies (5-50 employees) typify the businesses that locate in rural communities and ones that Estacada has had significant success in attracting. They often have fewer impacts on transportation and infrastructure and are able to recruit employees from the local labor market.

Commercial Targets:

- Retail expansion has strong potential with emphasis on community-serving, convenience and small specialty retail. Large scale development is dependent on significant population growth. Specific retail targets will be provided by the retail market analysis, a complementary report to the EOA to be completed in January 2009. Preliminary findings appear in Appendix A. The retail exhibits show potential for retail expenditures and space demand for the Estacada retail market area, roughly the size of the school district boundaries. Total potential supportable retail space (2008-2029) in the market area is 500,586 square feet. These estimates are consistent with our estimates of future retail employment and land needs.
- Recreation-oriented businesses related to river and mountain activities are strong targets for Estacada and serve the community's interest in expanding the tourism industry. These may range from boat rentals and guided fishing tours to back country outfitters and other ecotours.
- Additional lodging facilities are potentially needed to capture more destination visitors and overnight tourists.
- Health care services and facilities to serve the growing population based should be targeted including medical facilities, wellness providers and doctors' offices.
- Entertainment-local movie theatre, bowling alley, swimming pool complex, ball fields and related community recreation.
- Art and culture-oriented businesses such as galleries and creative professionals.

Estacada Land Demand

Employment Projections

Job growth forecasts and business cluster opportunities discussed above translate into land demand forecasts. The analysis used for this study breaks employment into three general classifications for land: (1) Industrial, including construction & mining, manufacturing, transportation, communications & utilities and wholesale trade; (2) Commercial/Service, including retail trade, finance, insurance and real estate and services; and (3) Institutional/Government jobs. A fourth category – other/uncovered employment – is included to take into account home-based employment not included in employment counts; this factor is assumed to be 5% of covered employment (based on standards from the Department of Land Conservation & Development's Industrial & Other Employment Lands Analysis Guidebook).

For purposes of depicting the current and future employment base, the study area includes both the City of Estacada and the adjacent unincorporated Eagle Creek. A map of this study area (Map 1) is presented in Appendix A. This sub-region includes several companies with inter-dependent economic activity, particularly in the construction and metals industries. Table 6 displays estimated employment by type for the Estacada/Eagle Creek area and Clackamas County as of 2008 (estimated from ESRI Business Information Solutions).

Table 6
EMPLOYMENT BY TYPE
Estacada/Eagle Creek & Clackamas County
2008

Employment Type	Estacada/ Eagle Creek	Clackamas County	Estacada/ Eagle Creek % of Clackamas
Construction & Mining	106	7,929	1.3%
Manufacturing	124	18,944	0.7%
Transportation, Communication & Utilities (TCU)	39	3,708	1.1%
Wholesale Trade	63	13,096	0.5%
Industrial Jobs	332	43,677	0.8%
Retail Trade	234	17,840	1.3%
Finance, Insurance & Real Estate (FIRE)	72	10,740	0.7%
Information	83	1,659	5.0%
Services	598	51,357	1.2%
Commercial/Service Jobs	987	81,596	1.2%
Government	26	7,088	0.4%
Other/Uncovered (5% of covered jobs)	67	6,618	1.0%
Total Nonfarm Employment	1,412	138,979	1.0%

Source: ESRI Business Information Solutions; INFO USA

As shown, the Estacada/Eagle Creek area contained 0.9% of total Clackamas employment in 2008. The area had a higher concentration of information and construction & mining employment and a lower concentration of government and wholesale trade.

To estimate increases in employment in the Estacada/Eagle Creek area through 2029, Oregon Employment Department projections for Clackamas County were used. Based on average annual increases in employment for Clackamas from 2004 to 2016, employment by sector in 2029 was estimated for the County.

The Estacada/Eagle Creek share or 'capture' of county jobs in 2008 was then used as the starting point for estimating employment in the area in 2029. However, several factors justify Estacada being able to capture a higher share of the county's future job growth, as much as double or higher its existing share. Among these are Estacada's aggressive community and business development marketing efforts, its multiple large reinvestment projects (EX: Highway 212/224 improvements, downtown TGM grant) its designation as a state Main Street community, creation of an Urban Renewal district, its widely acclaimed high quality of life and positive business environment (reported by numerous local business owners), lack of "ready" developable industrial land in the Metro area, including Clackamas County, and the findings of Metro's *Employment Demand Factors & Trends* report, showing employment growth concentrated in the outer metro areas. Evidence of Estacada's strong business positioning is how quickly the recently completed Estacada Industrial Park filled with 12 locally owned companies employing more than 100 people. All these reasons and the fact that ready industrial land, particularly large sites, will continue to be in short supply in the metro Portland area for the foreseeable future, contribute to demand for Estacada industrial land.

Reinforcing this perspective is Clackamas County's recent study of rural reserves that analyzed unconstrained developable land in Clackamas County. The study, and corresponding map (Map 2 in Appendix A), illustrate that Estacada contains or is proximate to a significant amount of the County's unconstrained, developable land. In the study, unconstrained land refers to land that is not significantly encumbered by steep slope, FEMA flood plain or National Wetlands Inventory. This land is considered prime for a large-format industrial manufacturing facilities requires large, suitable sites. Accordingly, there is implication that Estacada is well-positioned for attracting this type of industrial development.

In estimating Estacada's future employment growth, a customized methodology was used based on guidance from the project Advisory Task Force, City, County and State agency staff. The customized methodology assumes a "high growth scenario" for industrial employment through 2029, resulting in a capture of 9.5% of Clackamas County's projected industrial employment. A "moderate growth scenario" was assumed for commercial (5.8%), government (2.0%) and other employment (4.5%). This is in keeping with the findings of the comprehensive retail market analysis (January 2009) and the population growth rate anticipated for Estacada, (Table 8). Commercial expansion is associated with both residential and industrial growth with a moderate growth scenario reflecting a combination

of the two principal demand drivers. This methodology results in an effective capture rate of 5.7% of the total projected non-farm employment in Clackamas County through 2029. Table 7 depicts the methodology and total net employment increase by category.

Table 7

EMPLOYMENT PROJECTIONS BY TYPE
Estacada & Clackamas County
Through 2029

Employment Type	2016 Clackamas Projected Employment	Clackamas Avg. Annual Increase (2006 to 2016)	2029 Clackamas Projected Employment	Clackamas Total Employ. Increase (2008 to 2029)	Estacada/Eagle Creek Capture	Estacada/Eagle Creek Tot. Employ. Inc. (2008 to 2029)
Construction & Mining	14,220	213	16,989	9,060	10.4%	942
Manufacturing	18,910	54	19,612	668	5.6%	37
TCU	6,520	65	7,365	3,657	8.8%	322
Wholesale Trade	11,840	142	13,686	590	4.0%	24
Industrial Jobs	51,490	474	57,652	13,975	9.5%	1,325
Retail Trade	20,000	270	23,510	5,670	4.5%	255
FIRE	11,580	132	13,296	2,556	3.5%	89
Information	1,890	19	2,137	478	6.0%	29
Services	62,210	1,117	76,731	25,374	6.0%	1,522
Commercial/Service Jobs	95,680	1,538	115,674	34,078	5.8%	1,896
Government	17,880	74	18,842	11,754	2.0%	235
Other/Uncovered	8,253	104	9,608	2,990	4.5%	135
Total Nonfarm Employment	173,303	2,190	201,776	62,797	5.7%	3,590

Note: Services employment includes professional, education, healthcare, accommodation and food service and other service employment.

Source: Oregon Employment Department; ESRI Business Information Solutions; INFO USA

As shown, the study area is projected to have 3,590 new jobs by 2029, bringing the total to 5,002. These estimates are dependent on Estacada's continued aggressive marketing, community reinvestment and ability to provide an excellent business climate.

Table 8 summarizes projected population changes for the city over the next 22 years, based on anticipated growth rates in Clackamas County. OAR 660-024-0030 outlines administrative rules for projection future population. The primary method must utilize the County's coordinated population projection, provided that population projection is less than ten years old. Clackamas County did not have a coordinated population projection at the time this analysis was conducted, nor had intentions to coordinate a population projection within six months of adoption of the EOA. Therefore, the methodology for projecting Estacada's population utilizes the safe harbor approach outlined in OAR 660-024-0030(4). The City's current share of the total county population is used to

extrapolate a city population that represents the same share of total county population 20 years in the future. Assuming Estacada follows the county's growth, it will add 1,131 persons by 2029 to reach 3,826. Growth may occur at a faster pace if the housing market rebounds and previously approved single family homes are constructed in Estacada of good quality and at a moderate price.

Table 8

POPULATION PROJECTIONS
City of Estacada and Clackamas County
Through 2029

	2007 (Estimate)	2020 (Forecast)	2029 (Forecast)	Avg. Annual % Increase
City of Estacada	2,695	3,332	3,826	1.91%
Clackamas County	372,270	460,323	528,484	1.91%
Estacada Share of Clackamas	0.72%	0.72%	0.72%	

Source: PSU Population Research Center; Oregon Office of Economic Analysis

Land Demand Estimate

Table 9 reflects the methodology for estimating demand for vacant land for new commercial development based on employment growth forecasts for the Estacada/Eagle Creek area. Based on employee per acre standards from the Oregon Department of Land Conservation and Development's *Industrial and Other Employment Lands Analysis Guidebook*, employment forecasts were translated to acres of land needed to accommodate employment growth.

Table 9

20 YEAR LAND DEMAND ANALYSIS
Estacada and Eagle Creek
Through 2029

Type	Employment Growth Forecast (1)	Employees per Acre (2)	Land Needed (acres) (3)	Adjusted Vacant Land Needed (aces) (4)	% Vacant Land (5)	Vacant Land Needed (acres) (6)
Industrial	1,325	8	165.63	207.04	100%	207
Commercial/Service	1,896	14	135.41	169.26	70%	118
Government	235	6	39.18	48.98	75%	37
Other	135	6	22.43	28.03	75%	21
Total	3,590		363	453		383

(1) Increase in employment from 2008 to 2029 from Tables 6 and 7.

(2) Employees per acre from *Employment Lands Analysis Guidebook*.

(3) Employment growth divided by employees per acre standard.

(4) Factor of 25% additional land for public infrastructure.

(5) Estimated percentage of employment growth that will occur on vacant land rather than through infill/redevelopment.

(6) Adjusted acres of land needed multiplied by percentage of vacant land needed.

Source: Marketek, Inc.; *Industrial and Other Employment Lands Analysis Guidebook*; Metro 2002-2022 Urban Growth Report

Table 9 distinguishes vacant land demand from total land demand. This results in a slight increase in total land demand from the April 6 Draft EOA that properly accounts for demanded redevelopable land.

infill redevelopment will absorb some of this need for commercial space, particularly as urban renewal efforts focus on strengthening downtown Estacada. The remaining space is expected to be developed on currently vacant land. While some industrial development is expected to occur on infill and redevelopable parcels, this will be offset by existing employers moving to new sites, resulting in an industrial redevelopment rate of 0%.¹

The demand analysis shows an estimated total need for 363 acres of commercial and industrial land to accommodate forecasted employment in the study area. Additional land will be required for public roads, utilities, easements and other types of public infrastructure. This analysis assumes 25% of total gross buildable land area is allotted to such public facilities, per DLCD's *Guidebook*. This adjustment results in an estimated need for 453 acres of land based on anticipated employment growth in the Estacada/Eagle Creek area. COC estimates the following percentages of employment growth that will occur on vacant land rather than through infill/redevelopment:

- Industrial – 100%
- Commercial – 70%
- Government – 75%
- Other – 75%

Based on these percentages, the Estacada Study Area is anticipated to need approximately 383 acres of vacant employment land through 2029.

While Estacada is specifically exempt from OAR 660-009-020(1)(b) requiring identification of **short-term sites** (as defined by OAR 660-009-0005(10)), COC estimated "short-term" land requirements (land needed within 1 to 5 years) to be a third of the total vacant land needed through 2029. According to DLCD's *Guidebook*, this estimate will allow for a competitive land supply allowing tenants to choose between a variety of locations that meet their site needs. Table 10 summarizes short- and long-term demands for vacant land by employment type. Approximately 151 acres of commercial and industrial land will be needed through 2014; an additional 302 acres will be needed through 2029 for a total need of 453 acres, with 383 acres of this dedicated to vacant land.

¹ No specific statistics are available for Estacada. Redevelopment rates come from examining secondary research by the Urban Land Institute examples and Metro. The only Oregon agency that has done work on this is Metro, which conducted an extensive survey of rural and urban sites in their service area and demonstrated that industrial redevelopment rates are very wide-ranging, from +35-40% to 0 -40%. This is how the redevelopment rate estimate of 0% was derived.

Table 10
SUMMARY OF INDUSTRIAL AND COMMERCIAL
LAND REQUIRED THROUGH 2029
Estacada and Eagle Creek

Type	Total Short-Term Land Required (2009 to 2014)	Short-Term Vacant Land Required (2009 to 2014)	Total Long-Term Land Required (2009 to 2029)	Long-Term Vacant Land Required (2009 to 2029)
Industrial	69	69	207	207
Commercial/Service	56	39	169	118
Government	16	12	49	37
Other	9	7	28	21
Total	151	127	453	383

Site Suitability Analysis

This section summarizes the nature of development that is likely to be attracted to the range of commercial and industrial sites expected to develop in Estacada over the next 20 years. Ideally, a variety of real estate products will develop including:

- A retail/service center anchored by a grocery.
- A site for a community health care facility.
- Lodging site.
- Business park with flexible, multi-tenant space.
- Industrial park for manufacturing and warehouse uses.
- Neighborhood shopping center to serve Estacada's growing residential base.
- Sites that are flexible, offering excellent transportation access and are free from environmental constraints are highly attractive. Other general requirements for employment lands are summarized below.

General Requirements

Each industry has particular needs that cause a specific site to be more appropriate for their uses than another. However, several basic standards or criteria enhance the probability that an industrial site is ready for the construction of a manufacturing facility.

- **Appropriate Zoning** - Commercial and industrial firms alike want to be good neighbors in the community in which they locate and, similarly, want assurance through zoning that future good neighbors will also locate near their facility. Industrial firms seek locations that cause the least inconvenience for residential and commercial areas.
- **Highway Access** - Industrial users generally want to locate adjacent to a state highway to be assured the road is amenable to truck transportation and access. Many commercial firms are interested in the exposure to customers that a highway provides.
- **Parking** - The ready availability of parking is a priority for commercial and industrial users, at four to five spaces per 1,000 SF for retail uses and two to three spaces per 1,000 SF for industrial.
- **Topography and Soil Conditions** - Topography is an important factor for any site. Companies usually seek fairly level sites for easy infrastructure installation, reduced cost of site work and adequate drainage.
- **Utilities** - Utility standards are determined by the size of the site and its proximity to utility supplies. Local plans detail minimum standards and a site-specific engineering study would address electric, natural gas, water/sewer and storm water requirements.

Additionally, completion of a Phase 1 environmental site assessment will be another selling point assuming that it demonstrates the absence of environmental issues.

Employment Uses by Site Size

In keeping with the Estacada EOA's supply and demand analysis of small, medium and large employment sites, the types of commercial and industrial uses attracted to these sites are summarized in Table 11 below with general site requirements.

Table 11
Potential Users and Key Requirements by Site Size

Site Size	Commercial		Industrial	
	Suitable Uses	Key Requirements	Suitable Uses	Key Requirements
Small (< one acre)	Stand-alone retail/office, mixed-use, infill	Visibility, customer traffic, complementary uses nearby	Freestanding, single users	
Standard (1-10 acres)	Health care center; business park, neighborhood convenience center (30,000 SF to 50,000 SF & 5-6 stores)	Visibility; parking; Common roadway system; nearby services	Manufacturing; flex space	Compatible nearby uses
Large (> 10 acres)	Town Center Shopping District (grocery-anchored w/ 100,000 SF to 150,000 SF)	Visibility, access, truck loading/	Manufacturing, Warehousing/Distribution; flex space; single or multiple users	Transportation access & convenience; compatible adjacent land uses

Source: Marketek, Inc.

For additional detail regarding key industrial uses referred to in this section, Table 12 provides a brief definition together with average employee and development densities and general minimum acre requirements.

Table 12
National Employee Densities, Average Square Foot, Average Acreage Requirements

Category	Description	Employees/ 1,000 SF	1,000 SF/Acre	Site Requirements (acre minimum)
Warehousing	Storage of materials; may include office & maintenance	1.28	11.23	10-acre
Manufacturing	Conversion of raw materials or parts to finished products	1.87	9.94	5-acre (varies widely)
Business/Flex-Space Park	Group of fix-type or incubator 1-2 story buildings with common road system; office & light industrial	3.01	11.19	5-10 acre
Industrial Park	Multiple industrial or related facilities	2.00	11.06	30-acre

Source: Institute of Transportation Engineers, Marketek, Inc.

Existing Industrial and Commercial Land Supply

In accordance with OAR 660-009-0015(3), the following summarizes the existing industrial and commercial land supply for the City of Estacada.

COC worked closely with Clackamas County GIS Division to conduct an inventory of existing buildable industrial and commercial lands in Estacada, the Buildable Lands Inventory (BLI).

Using guidance from DLCD's Industrial and Other Employment Lands Analysis Guidebook (2005) and agency staff, and in accordance with OAR 660-009-0015(3)(a)(A-C), the City created a base inventory consisting of select industrial and commercial parcels within Estacada's Urban Growth Boundary (UGB) using a tax assessor's database provided by Clackamas County.

The inventory consists of the following:

- **Vacant Industrial and Commercial Parcels.** Industrial and commercial properties within the UGB that have zero improvement value.
- **Potential Infill (Underutilized).** Industrial and commercial properties where the parcel size is more than double the minimum lot size for the zone.
- **Potentially Redevelopable.** Industrial and commercial properties where the ratio of assessed improvement value to land value is less than 1.

The above methodology yielded an initial inventory of 220 industrial and commercial parcels, comprising approximately 458.19 acres.

COC, City and County staff verified the accuracy of this initial inventory, and 15 parcels removed comprising approximately 12.6 acres due to the following factors:

- Anomalies/inaccuracies in the GIS data
- Parcels owned by the City, County or state agency considered permanently unavailable
- Parcels identified through field checks by COC, City and County staff as improperly identified or categorized according to the BLI methodology
- Commercial parcels containing an historic building

A list of properties removed from the inventory is presented in Appendix B.

This reduction resulted in an adjusted gross inventory of 205 industrial and commercial parcels comprising approximately 445.59 acres. Table 13 provides an adjusted gross inventory of acreage by type.

Table 13
ADJUSTED GROSS INVENTORY OF BUILDABLE INDUSTRIAL AND COMMERCIAL LANDS IN ESTACADA

Parcels by Type	Industrial		Commercial		Total	
	Parcels	Acreage	Parcels	Acreage	Parcels	Acreage
Vacant	54	211.14	38	59.81	92	270.95
Potential Infill	14	62.67	24	26.43	38	89.10
Potentially Redevelopable	18	55.56	57	29.98	75	85.54
Total	86	329.36	119	116.23	205	445.59

Existing land suitable for employment purposes are distributed among three current zoning designations:

- **Industrial**
 - M1 – Light Industrial
 - M2 – Heavy Industrial
- **Commercial**
 - C1 – Commercial

Table 14 provides a gross inventory of existing employment land by zoning designation.

Table 14
ADJUSTED GROSS INVENTORY OF BUILDABLE EMPLOYMENT LANDS IN ESTACADA BY ZONING

Zoning Designation	Parcels	Total Acres	Vacant	Redev/ Infill
Industrial	86	329.36	211.14	118.23
M1 - Light Industrial	77	295	203.92	90.77
M2 - Heavy Industrial	9	35	7.21	27.46
Commercial	119	116.23	59.81	56.42
C1 - General Commercial	119	116.23	59.81	56.42
Total	205	445.59	270.95	174.64

There are approximately 270.95 acres of existing vacant land in Estacada for employment purposes. Approximately 211.93 acres is industrial and the remaining 59.81 acres is commercial land. Of note, approximately 75% of existing vacant land is designated as M1 – Light Industrial.

Environmental Constraints

Consistent with guidelines outlined in the DLCDD's *Guidebook*, COC calculated acreage affected by short- and long-term constraints. These include the following and their respective acreage:

Long-term:

- Presence of wetlands (National Wetlands Inventory)
- Presence of steep slope (above 20% grade)

- Presence of slide prone area

Short-term:

The following short-term land constraints were a determining factor in assessing the suitability of existing industrial and commercial property within Estacada's city limits, as well as

- Community development objectives
- Ownership status and intended development plans
- Willingness to sell/redevelop
- Practical market conditions
- Intended provision of future urban services (e.g. water, sewer, transportation systems)

Long-term constraints were subtracted from the remaining inventory of gross buildable acres.

Table 15 provides a "net" inventory of industrial and commercial lands and the amount of long-term constrained acreage.

**Table 15
NET INVENTORY OF BUILDABLE EMPLOYMENT LANDS IN ESTACADA**

Zoning Designation	Parcels	Acres	Wetlands	Slope	Buildable Acres	Vacant	Redev/ Infill
Industrial	86	329.36	7.00	6.35	316.02	209.36	106.66
M1 - Light Industrial	77	287	7.00	1.00	278.85	195.24	83.61
M2 - Heavy Industrial	9	43	0.00	5.35	37.17	14.12	23.05
Commercial	119	116.23	0.27	5.63	110.33	57.86	52.47
C1 - General Commercial	119	116.23	0.27	5.63	110.33	57.86	52.47
Total	205	445.59	7.27	11.98	426.34	267.21	159.13

[Note to Council: Table 15 illustrates Estacada's net inventory based on gross supply. It does not account for the comprehensive plan rezone proposed in the April 6 Draft EOA.]

Approximately 7.27 acres of available industrial and commercial land is constrained by wetlands and 11.98 acres is constrained by steep slope above a 20% grade.

By removing long-term constraints, there are approximately 426.34 acres of existing buildable industrial and commercial acres inside Estacada's UGB, with 316.02 acres of buildable industrial lands and 110.33 acres of buildable commercial land.

Inventory of Sites by Size

Buildable sites can be classified by size according to the following thresholds, as identified in DLCD's *Guidebook*:

- **Small Sites:** Less than one acre.

- **Standard Sites:** 1- 10 acres.
- **Large Sites:** Above 10 acres.

Table 16 provides buildable industrial and commercial sites by size.

Table 16
BUILDABLE INDUSTRIAL AND COMMERCIAL SITES BY SIZE

Zoning Designation	Total Sites		Large Sites		Standard Sites		Small Sites	
	Parcels	Acres	Parcels	Acres	Parcels	Acres	Parcels	Acres
Industrial	86	317.75	5	116.78	49	182.94	32	18.03
M1 - Light Industrial	77	287.63	4	97.09	48	176.67	25	13.86
M2 - Heavy Industrial	9	30.12	1	19.68	1	6.27	7	4.16
Commercial	119	109.80	1	30.20	21	45.90	97	33.69
C1 - General Commercial	119	109.80	1	30.20	21	45.90	97	33.69
Total	205	427.54	6	146.98	70	228.85	129	51.72

There are currently six large buildable sites— five industrial (116.78 acres) and one commercial (30.20 acres). There are 70 standard sites (228.85 acres) and 129 small sites (51.72 acres).

Conclusion

Based on the assumptions used in this analysis, the following are a set of conclusions regarding employment lands in Estacada:

- **Industrial Land Supply.** While Estacada appears to have a surplus of industrial land to meet projected demand through 2029, the City lacks and adequate supply of suitable large industrial sites. Considerable rezoning according to site suitability needs is expected to leave the City with an overall deficit.
- **Commercial Land Supply.** Estacada appears to have a long-term shortage of commercial land to meet projected demand; however, the demand for commercial land is directly related to the "medium-growth" rate assumption used in this report. During the next phase of the study, the City should conduct a market-based analysis to assess the validity of this growth assumption, and corresponding implications for commercial land supply.
- **Additional Tools.** There appears to be interest in the creation of an "employment zone" that would permit specific employment-related industries and businesses that provide high-wage jobs to the community. The creation of an employment zone is one tool that has added value in other communities and may be appropriate for certain areas in Estacada.

Immediate Next Steps

The following are immediate action items to ensure a 20-year supply of employment land to realize Estacada's economic development vision:

- Consider rezoning existing employment (commercial and industrial) lands that are considered unsuitable for long-term employment use. As part of this work, conduct a market-based analysis to verify the commercial growth rate assumptions (building upon the retail market analysis).
- Complete Comprehensive Plan (map and text) changes to identify suitable employment lands consistent with the June 2009 Economic Opportunity Analysis Vision and Goals.
- Consider zoning ordinance changes to include a proposed employment zone, and complete corresponding changes to the City's development code to restrict specific uses in existing commercial and industrial zones.
- After the steps as stated above have been completed, the City will take any additional steps needed to ensure a sufficient 20-year supply of employment land, including expansion of the Urban Growth Boundary consistent with statewide land use Goal 14, Urbanization.

Implementation

To implement the economic development goals outlined in this report, The City of Estacada proposes the following strategies and actions to amend the City's Comprehensive Plan:

Estacada EOA Implementation Strategy

Goal 1: Focus industrial development on employment lands that are serviceable, accessible and marketable to diverse industries.					
	Strategy	Timeline		Responsibility	
		Short-term (1-3 yrs)	Long-term (3-20)	Lead	Support
1.1	Rezone properties that are unsuitable for industrial development.	X		City	County
1.2	Identify areas suitable to meet commercial land needs.	X		City	County
1.3	Consider an employment zone to meet Estacada's future land use vision and needs.	X		City	County
1.4	Aggressively market available industrial land that has adequate infrastructure and is 'ready' for business	X	X	County	City

Goal 2: Invest in capital improvements and pursue regulatory measures to support designated employment areas.					
	Strategy	Timeline		Responsibility	
		Short-term (1-3 yrs)	Long-term (3-20)	Lead	Support
2.1	Review and update capital improvement plans for water, sewer and transportation to adequately serve employment purposes	X		City	County
Action 2.1.1	Update the plan and CIP annually.	X	X	City	County
2.2	Advocate for planning, financing and development of utilities to ensure employment lands have sufficient carrying capacity to support development	X	X	City	County

Action 2.2.1	Expedite the planning, zoning, financing and extension of infrastructure for employment lands	X	X	City	County
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Goal 3: Provide adequate industrial lands to grow existing businesses and attract a diversity of new industries.

	Strategy	Timeline		Responsibility	
		Short-term (1-3 yrs)	Long-term (3-20)	Lead	Support
3.1	Closely monitor Buildable Lands Inventory (BLI) and development to ensure adequate supply.	X	X	City	County
Action 3.1.1	Report to Planning Commission annually.	X		X	
3.2	Develop 'shovel ready' employment sites	X		City	County

Goal 4: Retain suitable industrial land for industrial purposes.

	Strategy	Timeline		Responsibility	
		Short-term (1-3 yrs)	Long-term (3-20)	Lead	Support
4.1	Limit conversion of marketable industrial land to other uses such as retail, churches, and schools.	X	X	City	County
Action 4.1.1	Strengthen industrial sanctuary provisions in the Comprehensive Plan and Zoning Ordinance.	X		City	County

Goal 5: Limit retail in industrial zones to support industrial area businesses.

	Strategy	Timeline		Responsibility	
		Short-term (1-3 yrs)	Long-term (3-20)	Lead	Support
5.1	Revise Comprehensive Plan and Zoning Code standards to appropriately limit retail and other conflicting uses in employment areas.	X		City	County

5.2	Discuss industrial sanctuary protections with Planning Commission and City Council.	X		City	County
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Goal 6: Increase the number of jobs and attract new businesses to meet local opportunities in growing sectors such as healthcare, tourism, and green technology, including those utilizing green building practices and sustainable natural resources.

		Timeline		Responsibility	
		Short-term (1-3 yrs)	Long-term (3-20)	Lead	Support
6.1	Support a diverse and skilled workforce who is capable of providing services to the green and sustainable industry sectors.	X		City	County/ CCC/ Others
6.2	Provide proactive business retention and expansion assistance to strengthen existing local business	X		City	County/ CCC/ Others
Action 6.2.1	Maintain and enhance the local labor pool through workforce development opportunities with Clackamas Community College (CCC) and other universities such as Portland State University and University of Oregon (Portland Campus).	X		City	County
6.3	Position Estacada as a supportive and responsive business environment.	X		City	County/ Chamber/ Lenders
6.4	Partner with the Clackamas County Tourism Council in pursuit of Create opportunities to increase tourism, overnight stays and recreation-based opportunities.	X		City	County/ Chamber/ Tourism Agency
6.5	Support decentralized, renewable district energy generation and use and other green building practice solutions.	X		City	County
Action 6.5.1	Coordinate with County Office of Sustainability on emerging best practices for employment land and recruitment.	X		City	County/ OECD

Goal 7: Continue the investment in downtown as a walkable, mixed use district that includes residential opportunities.

	Strategy	Timeline		Responsibility	
		Short-term (1-3 yrs)	Long-term (3-20)	Lead	Support
7.1	Support the Estacada Main Street Program	X		City	County/OECDD
Action 7.1.1	Pursue funding for a downtown plan.	X		County	City/ODOT
7.2	Focus Urban Renewal funds in the downtown as they become available.	X		City	County

Action Plan Key

Goal – statement of intent; policy adopted into comprehensive plan

Strategy – implements goal/policy

Action – implements strategy

Timeframe – short and long term

Lead – responsibility for implementation

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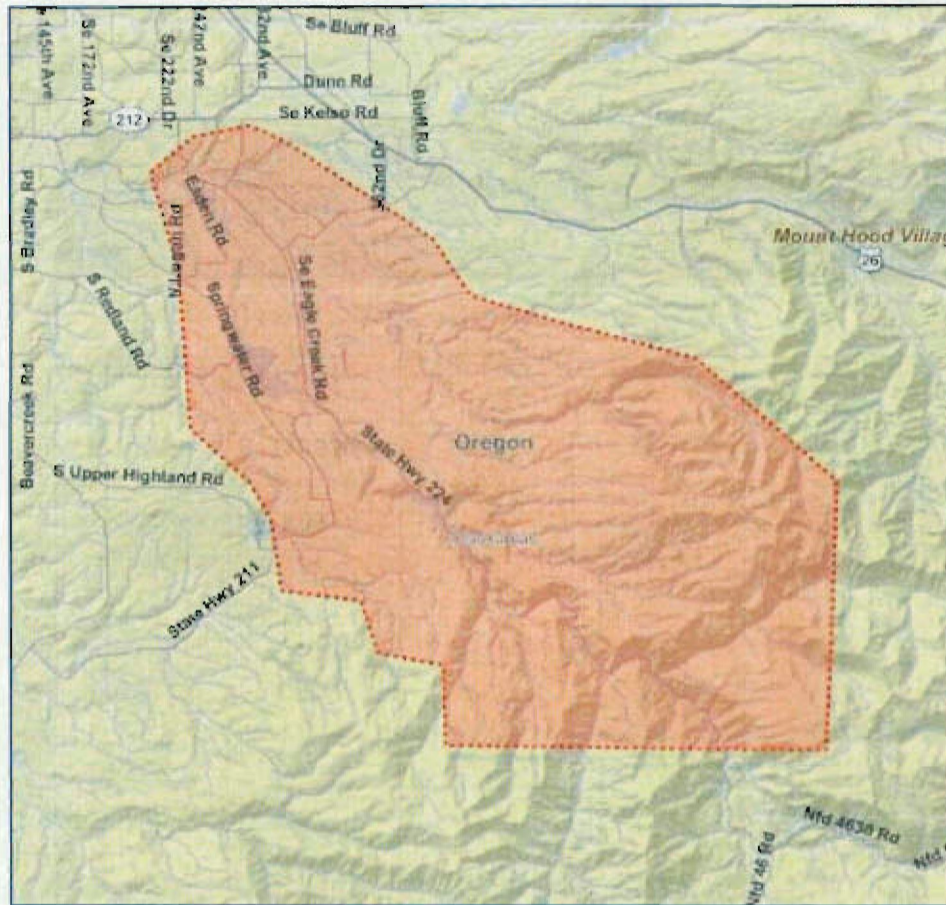
Appendix A

Demographic and Housing Snapshot 2008

DEMOGRAPHIC & HOUSING SNAPSHOT City of Estacada, Estacada Market Area, Clackamas County & Oregon 2008				
Demographic Indicator	City of Estacada	Estacada Market Area	Clackamas County	State of Oregon
Population				
2008 (estimate)	2,744	17,089	379,043	3,814,725
2013 (forecast)	2,989	18,055	412,910	4,105,010
Avg. Ann. %Change ('00 to '08)	1.97%	0.82%	1.50%	1.44%
Avg. Ann. %Change ('08 to '13)	1.79%	1.13%	1.79%	1.52%
Households				
2008 (estimate)	973	6,018	141,554	1,484,798
2013 (forecast)	1,062	6,377	154,344	1,598,922
Avg. Ann. %Change ('00 to '08)	1.81%	0.71%	1.30%	1.42%
Avg. Ann. %Change ('08 to '13)	1.83%	1.19%	1.81%	1.54%
Average Household Size	2.81	2.81	2.66	2.52
Median Household Income	\$52,575	\$61,044	\$67,406	\$53,474
Median Age (Years)	34.7	41.8	39.6	38.0
Race				
Percent White Alone	82.0%	90.1%	89.4%	84.1%
Percent Other Race/2+ Races	18.0%	9.9%	10.6%	15.9%
Percent Hispanic	16.9%	7.9%	6.8%	10.8%
Homeownership	67.4%	83.0%	72.3%	60.3%
Educational Attainment				
Associate Degree	6.7%	7.3%	7.7%	7.4%
Four Year Degree or More	12.4%	16.6%	30.7%	27.4%

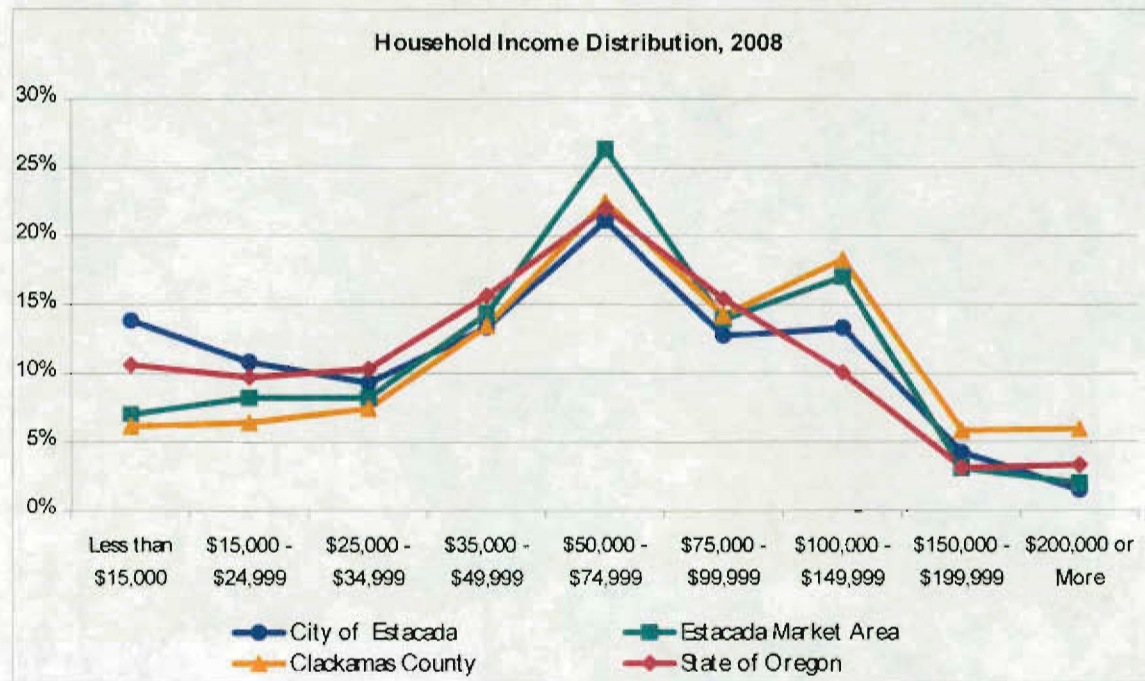
Source: ESRI BIS

Map 1 – Estacada Market Area



Household Income 2008

HOUSEHOLD INCOME City of Estacada, Estacada Market Area, Clackamas County & Oregon 2008				
Income	City of Estacada	Estacada Market Area	Clackamas County	State of Oregon
Less than \$15,000	13.8%	7.0%	6.1%	10.6%
\$15,000 - \$24,999	10.8%	8.2%	6.4%	9.7%
\$25,000 - \$34,999	9.3%	8.2%	7.4%	10.3%
\$35,000 - \$49,999	13.3%	14.3%	13.4%	15.6%
\$50,000 - \$74,999	21.1%	26.3%	22.5%	22.0%
\$75,000 - \$99,999	12.7%	13.9%	14.2%	15.4%
\$100,000 - \$149,999	13.3%	17.0%	18.3%	10.0%
\$150,000 - \$199,999	4.2%	3.1%	5.8%	3.1%
\$200,000 or More	1.5%	2.0%	5.9%	3.3%
Total	973	6,018	141,554	1,484,798
Median Household Income	\$52,575	\$61,044	\$67,406	\$53,474



Source: ESRI BIS

Existing Retail Balance 2008

EXISTING RETAIL BALANCE Estacada Market Area 2008					
Merchandise Category	Demand/ Spending Potential	Supply/ Retail Sales	Leakage (or Surplus)	Target Sales (\$/SF)*	Potential Space
Shoppers Goods					
Apparel	\$4,974,903	\$401,377	\$4,573,526	\$209	21,883
Home Furnishings	\$4,828,431	\$395,667	\$4,432,764	\$199	22,275
Electronics & Appliances	\$4,851,275	\$306,063	\$4,545,212	\$199	22,840
Home Improvement & Gardening	\$6,310,081	\$1,411,953	\$4,898,128	\$216	22,677
Sporting Goods, Hobbies, Books & Music	\$2,279,713	\$627,485	\$1,652,228	\$216	7,649
General Merchandise	\$34,233,328	\$3,977,605	\$30,255,723	\$216	140,073
Miscellaneous Specialty Retail (florist, office supplies, gift stores, etc.)	\$2,572,150	\$4,311,986	(\$1,739,836)	---	---
Convenience Goods					
Grocery	\$26,466,991	\$12,966,147	\$13,500,844	\$395	34,179
Health & Personal Care	\$4,081,538	\$2,636,457	\$1,445,081	\$365	3,959
Restaurants					
	\$22,704,608	\$7,757,331	\$14,947,277	\$263	56,834
Total Leakage					\$80,250,783
Estimated Supportable Square Footage					332,369

* Target sales are based on the Urban Land Institute, "Dollars and Cents of Shopping Centers."

Source: ESRI BIS Marketek, Inc.

Retail Expenditure Potential

RETAIL EXPENDITURE POTENTIAL Estacada Market Area 2008-2029								
Merchandise or Service Category	Per Household Expenditure	Target Sales (\$/SF)*	2008 Retail Potential		2018 Retail Potential		2029 Retail Potential	
			Sales (in mil \$)	Space (SF)	Sales (in mil \$)	Space (SF)	Sales (in mil \$)	Space (SF)
Apparel	\$2,039	\$209	\$12.3	58,707	\$13.8	65,920	\$15.6	74,571
Home Furnishings	\$1,569	\$199	\$9.4	47,458	\$10.6	53,290	\$12.0	60,283
Home Improvement	\$1,361	\$140	\$8.2	58,494	\$9.2	65,681	\$10.4	74,301
Misc. Specialty Retail	\$2,106	\$216	\$12.7	58,686	\$14.2	65,896	\$16.1	74,544
Shoppers Goods			\$42.6	223,344	\$47.8	250,786	\$54.1	283,699
Grocery	\$6,185	\$390	\$37.2	95,435	\$41.8	107,161	\$47.3	121,225
Health/Personal Care	\$1,118	\$365	\$6.7	18,438	\$7.6	20,703	\$8.5	23,420
Convenience Goods			\$43.9	113,873	\$49.3	127,864	\$55.8	144,645
Restaurants	\$3,607	\$263	\$21.7	82,534	\$24.4	92,675	\$27.6	104,838
Entertainment	\$435	\$90	\$2.6	29,099	\$2.9	32,674	\$3.3	36,963
Personal Services	\$931	\$151	\$5.6	37,087	\$6.3	41,644	\$7.1	47,109
Total			\$116.5	485,938	\$130.8	545,644	\$147.9	617,254
Ten Year Net Gain					\$14.3	59,706	\$17.2	71,610

* Target sales are based on the Urban Land Institute, "Dollars and Cents of Shopping Centers."

Sources: ESRI BIS Urban Land Institute; Marketek, Inc.

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RETAIL POTENTIAL BASED ON VISITOR EXPENDITURE Clackamas County 2008-2029								
Retail Category	Percent of Spending*	Target Sales (\$/SF)	2008		2018		2029	
			Spending (in millions)	Space (SF)	Spending (in millions)	Space (SF)	Spending (in millions)	Space (SF)
Retail	26%	\$216	\$113.3	524,632	\$153.6	710,977	\$197.8	915,957
Grocery	6%	\$390	\$26.2	67,054	\$35.4	90,870	\$45.7	117,069
Restaurants	24%	\$263	\$104.6	397,732	\$141.8	539,003	\$182.6	694,402
Total			\$244.1	989,417	\$330.8	1,340,851	\$426.1	1,727,428
Ten Year Net Gain					\$86.7	351,434	\$95.4	386,577

Note: This analysis assumes Retail spending makes up 26% of visitor spending, Groceries make up 6% and Restaurants make up 24%. The remaining 44% of spending is in Accommodations (15%), Entertainment/ Recreation (9%) and Ground Transportation (20%).

Source: Dean Ruyyan Associates, Marketek, Inc.

RETAIL EXPENDITURE POTENTIAL Estacada Market Area 2008-2029				
Merchandise/ Service Category	2008	2029	2029	2008-2029 Total
	Existing Unmet Resident Demand	Market Area Resident Demand	Visitor Demand	Potential Supportable Space
	(\$)	(\$)	(\$)	(\$)
Shoppers Goods				
Apparel	21,883	15,864	NA	37,747
Home Furnishings	45,115	12,825	NA	57,940
Home Improvement	22,677	15,807	NA	38,483
Misc. Specialty Retail	147,722	15,859	19,566	183,147
Subtotal	237,397	60,355	19,566	317,318
Convenience Goods				
Grocery	34,179	25,790	2,501	62,470
Health/Personal Care	3,959	4,982	NA	8,942
Subtotal	38,138	30,772	2,501	71,411
Restaurants	56,834	22,303	14,834	93,971
Entertainment	NA	7,863	NA	7,863
Personal Services	NA	10,022	NA	10,022
Total	332,369	131,316	36,901	500,586

Source: ESRI; Urban Land Institute; Marketek, Inc.

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PORTLAND, OR 97208
MON 10 AUG 2009

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