

MACKENZIE.

COLUMBIA COUNTY INDUSTRIAL LAND INVENTORY PROJECT

To
Port of Columbia County

Dated
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Project Number
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PROJECT PARTICIPANTS

- City of Scappoose
- City of St Helens
- Columbia County
- Columbia Economic Team
- Columbia River PUD
- Port of Columbia County



Consultant Team

Mackenzie – Matt Butts (Principal in Charge), Gabriela Frask (Project Manager), Brent Ahrend, James Abbott, Brent Nielsen, Nicole Burrell, Ryan Turner-Brady

EXECUTIVE SUMMARY

This Columbia County Industrial Land Inventory Project was created by the Project Advisory Group (PAG), comprised of the Port of Columbia County, City of Scappoose, City of St Helens, Columbia Economic Team, and Columbia River PUD in the summer of 2021. This project is a direct response to the real market need to have, understand, and maintain an adequate supply of market ready industrial sites for business expansion, retention, and recruitment within Columbia County. To help encourage economic development, materials and tools that effectively provide industry specific information on site availability and their readiness for economic development are needed. A current inventory documenting common elements of sites ready for development and sites in varying states of development readiness is important to inform policy makers, economic practitioners, and service providers as they work together to recruit new businesses and help existing businesses expand throughout the County.

Project Purpose

The goal of the project is to create an inventory of industrial land and analyze the inventory's development readiness. The project examines the current and near-term supply of industrial sites, five acres and larger, that are available to accommodate the expansion of existing employers and recruitment of new employers throughout Columbia County. For purposes of this study, only vacant and industrially zoned lands within Columbia County were analyzed.

The purpose of this project is to:

- Determine the supply and development readiness of industrial sites within Columbia County to meet market demand.
- Evaluate the geographic distribution of the industrial land supply in site size and geographical location.
- Determine common site development constraints and challenges facing industrial development.
- Inform discussion on future tools and policies to maintain a market-ready inventory of industrial sites.
- Inform regional service providers on the location and size of County's industrial land supply and their utility deficiencies.

The Columbia County Industrial Land Inventory Project was divided into five tasks:

Task 1: Project Kickoff Meeting. The project began with a kickoff meeting between the Mackenzie team and PAG to initiate the project and review the project schedule, deliverables, and expectations and discuss project goals and objectives. Tiering criteria and methodology that would be utilized in Task 3 were discussed. The PAG provided publicly available utility master plans, and Geographic Information Systems (GIS) data to Mackenzie for all jurisdictions within the County.

Task 2: Inventory. The Mackenzie team created the industrial site inventory using the data and documents provided by the PAG group in Task 1. This task included two virtual work sessions with the Mackenzie team and the PAG group, which provided the PAG opportunity for feedback and refined the preliminary results of the inventory. After additional analysis, the inventory deliverables were finalized.

Task 3: Tiering the Inventory. Using the GIS analysis from Task 2 and confirmed parameters from Task 1, the Mackenzie team determined and summarized the inventory sites into three Tiers (defined below), to

categorize the inventory sites based on their development readiness. This included a technical work session with the PAG and Mackenzie team to confirm and refine the draft results of the tiering. After feedback from the PAG on the preliminary results, the Mackenzie team presented the Tiering deliverables to the PAG for review.

Task 4: Final Report. This final report, including maps, data tables, methodologies, and supporting information was issued to the PAG. A draft report was provided to the PAG for comments and questions, which was incorporated into the final deliverable.

Task 5: Stakeholder Open House Presentation. PAG invited community stakeholders to review the findings of the land use inventory study in an open house format. Mackenzie provided a formal presentation, including a question-and-answer session for the PAG and Mackenzie team.

Project Findings

The study found 33 industrial sites within Columbia County which met the criteria of the study. The sites were then analyzed for their development readiness¹, based on these three tiers:

- **Tier 1:** Development ready within six months.
- **Tier 2:** Development ready in seven to 30 months.
- **Tier 3:** Sites requiring more than 30 months to be development ready.

This study found:

Seven (7) Tier 1 sites

Available for construction within six months

Four of these sites are located in Scappoose and the other three sites are located in St Helens. These are available for traded-sector industrial development in the near term.

Twelve (12) Tier 2 sites

Available for construction between seven and 30 months

There is a modest supply of mid-term sites requiring investment and policy actions to bring these sites to market. Most investments require public infrastructure upgrades (water, sewer, stormwater, transportation) and/or annexation. Half of the sites (6) are located in Scappoose.

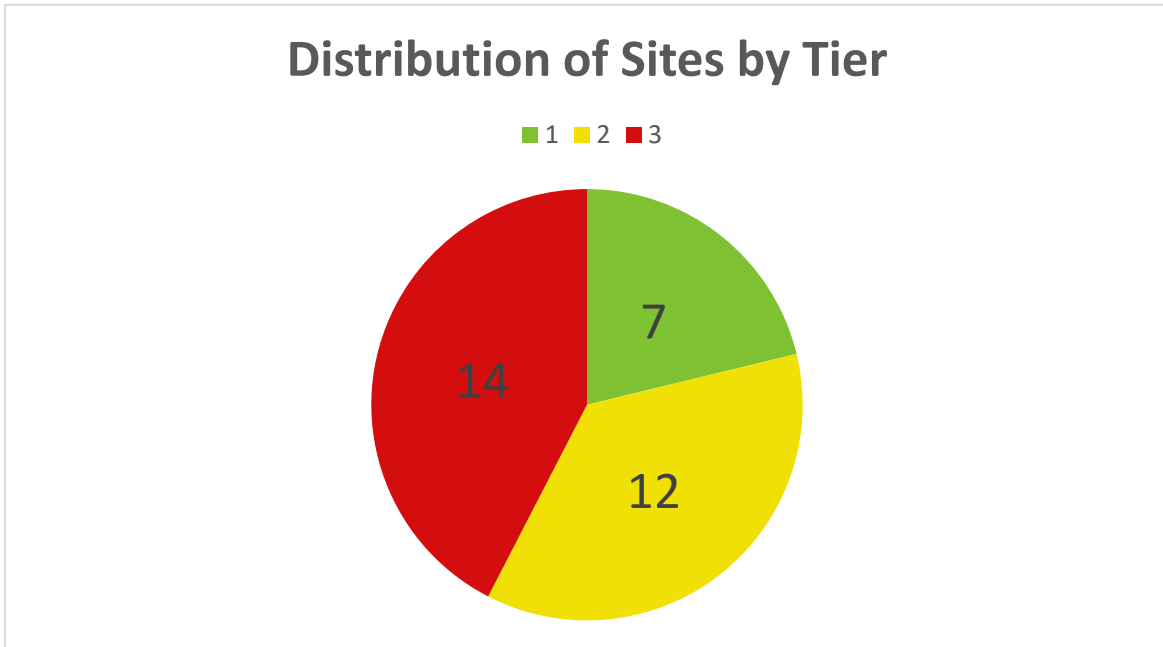
Fourteen (14) Tier 3 sites

Available for facility construction beyond 30 months

There are multiple challenges and significant investment required to bring these sites to market. Half of the sites (7) are located in Rainier).

¹ For the purposes of this study, development readiness means the ability to pull permits and start construction.

Figure 1: Site Distribution Based on Tiers



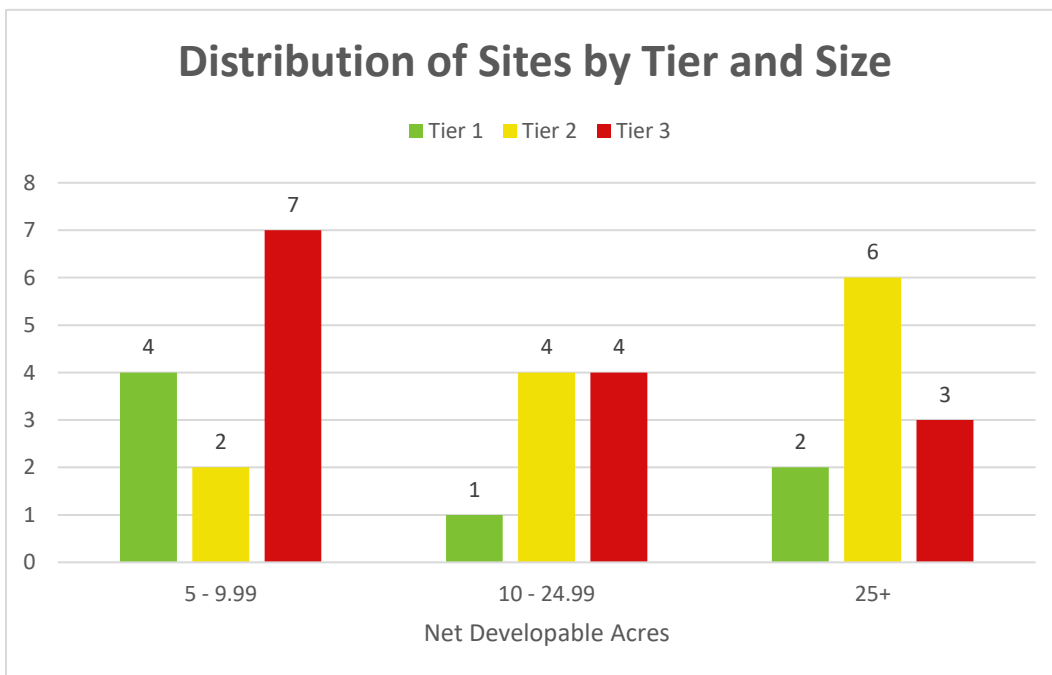
The study also found a wide variety of distribution of sites by size:

Tier 1 sites: Two (2) 25+ acre site, one (1) 10-24.99 acre site, and four (4) 5-9.99 acres sites.

Tier 2 sites: Six (6) 25+ acre sites, four (4) 10-24.99 acre sites, and two (2) 5-9.99 acre sites.

Tier 3 sites: Three (3) 25+ acre sites, four (4) 10-24.99 acre sites, and seven (7) 5-9.99 acre sites.

Figure 2 Site Distribution Based on Tiers and Size



INVENTORY METHODOLOGY

1. Land Use Planning and Geographic Information System (GIS) Analysis

This project focused on industrial sites five (5) acres and greater within Columbia County. The focus on five (5) acres and above is based on direct feedback from the PAG on recent recruitment needs, so a market-related criteria factor. The PAG identified the characteristic minimum site size for most of their industry recruitment targets. For the purposes of this inventory study, sites are defined as either: (a) single tax lot with at least five (5) buildable/net developable acres of land zoned to allow industrial uses, or (b) adjacent tax lots in a single ownership or multiple ownerships if they have the potential for tax lot assembly to total at least five (5) buildable/net developable acres of land zoned to allow industrial uses. Sites may be located either inside the County or city limits of a jurisdiction. Sites have current industrial zoning. The intent of this work is to ascertain market readiness of the sites in the inventory and confirm they will be available to meet industrial development market demand.

Industrial sites support the County's economic development strategy and make the region competitive in the global marketplace. This inventory of five-acre and larger sites will also provide a common understanding of the barriers and investments needed to make sites development-ready. This report and methodology may inform the future work of local jurisdictions, Columbia County, and other stakeholders as they lay a foundation for innovative financing tools and approaches. Smaller industrial sites are also important to the region; however, they typically require less investment to be development ready and have fewer barriers, therefore, they do not require significant efforts for development. (These sites are listed on Table 8 in Section 12 of this report.)

To identify the inventory of development-ready sites in the region, the project applied a series of filters utilizing publicly available Geographic Information Systems (GIS) data. Starting with Columbia County's tax lot and parcel information, provided to Mackenzie in September 2021, and supplemented with information from local jurisdictions within the County, the analysis identified parcels with the following characteristics:

1. Inside Columbia County or municipal jurisdiction boundaries;
2. Zoned/Comprehensive Planned for industrial uses;
3. Containing at least five (5) net developable, contiguous, and vacant acres after accounting for environmental constraints such as wetlands, floodplain, and slope constraints; and
4. Not "land banked"² by existing companies for their own future development purposes.

The first step in this analysis was to complete a GIS-based analysis of the vacant land within Columbia County and municipal jurisdictions to examine all vacant parcels that were both five (5) or greater gross, contiguous acres and industrially zoned. First, sites with five (5) or more acres of zoned industrial land were identified. Next, a GIS analysis calculated for sites with five (5) or more net developable acres, accounting for environmental constraints, including wetlands, floodplains, and steep slopes. After conducting the initial GIS analysis and identifying five-plus acre net developable sites, vacancy and parcel ownership information was used to refine the list to meet the requirements of the inventory list. Once this inventory of single, five (5) net developable acre parcels was established, the consultant team analyzed adjacent parcels that might be aggregated into five-plus gross acre sites, including aggregated

² Parcels that are owned and held for future expansion by existing regional firms. Further described in Section 12 below.

sites under a single ownership. The PAG then applied their local market knowledge to identify additional sites—and to remove some previously identified sites—that were not accurately characterized in the inventory as vacant, marketable, or potentially developable industrial lands, based on their local market knowledge.

Information on the sites that did not meet these screening requirements can be found in Tables 7 and 8 of this report (pages 19 and 20). These tables include information on sites that were land banked by existing companies and held for their future continued use and/or expansion. Once sites that did not have five (5) net developable acres with the required characteristics were excluded from this inventory, the infrastructure and transportation evaluation of the inventory could begin for Task 3.

Using industry expertise from the PAG, the sites identified through this initial GIS process were further analyzed by the consultant team as to their market readiness based on sufficiency of utility infrastructure and transportation facilities, need for land assembly, availability for lease or sale, and owner willingness to transact. This more refined analysis resulted in an inventory of existing or potential industrial sites that were assigned a tier based on market readiness or estimated length of time before they can be developed. The methodology for the tiering process was built upon the well-recognized Regional Industrial Site Readiness Project in the Portland Metropolitan area with modifications that were needed to fit the scope of this study and specific to Columbia County. All additions and modifications were agreed upon by consensus of the PAG and the consultant team and are presented in Section 7 of this report.

2. Geographic Information Systems (GIS) Analysis

For the purposes of this technical project analysis, constrained lands include the following environmental areas:

- 100-year floodplain and floodway
- Wetlands
- Water (rivers, lakes, creeks, ponds, and streams)
- Riparian streams with corresponding buffers
- Steep slopes 5% and greater

Proposed impacts to these constrained environmental areas require extensive permitting and can be prohibitive for industrial development. This analysis should only be used for a general, regional analysis such as that provided with this study and is not meant to replace due diligence or further site investigation and survey work on each site. Only publicly available data was utilized in this analysis, as provided by Columbia County and the cities of Clatskanie, Columbia City, Rainier, Scappoose, St Helens, and Vernonia. No specific site survey or wetland delineations for any sites were available to reference during this project.

This analysis resulted in creating the industrial site inventory and concluded Task 2.

3. Public Infrastructure

With the consensus and criteria established in Task 1 regarding development readiness, the Task 3 public infrastructure analysis involved evaluating the existing public utility systems for their capacity to serve the identified industrial sites in Task 2. Mackenzie civil engineers reviewed utility information provided by the local jurisdictions and service providers and documented the availability and sizes of the public water, sanitary sewer, and storm systems.

Franchise utilities such as natural gas, electricity, and telecommunications were not included in the study. In general, these utilities install infrastructure on demand as development occurs. This is not to suggest that these utilities do not need to plan for future growth and expansion of their distribution systems; however, since they are not public agencies, their long-range planning objectives may not be publicly available. In our experience, coordination with franchise utility providers is an important step for new development, and public infrastructure improvements – roadways in particular – should consider providing franchise utilities easements or other access to the infrastructure backbone.

The public utility systems were evaluated and scored for their ability to serve industrial development at the inventory sites. Table 1 below summarizes the information that Mackenzie reviewed for the Task 3 utility analysis. The utility evaluations were then used as part of the tiering criteria described later in this report.

Utility System Research

The utility information for this study included master plans or other plan documents in addition to the GIS data provided by jurisdictions and service providers. In general, the publicly available information for the inventory site utilities provided information on the proximity of utility services to the inventory sites, utility pipe sizes, and for some sites the extent of known capacity deficiencies that would limit service to the site. Additionally, specific utility systems were reviewed with City staff when documented information was absent or incomplete.

Table 1: Utility Information	
JURISDICTION	UTILITY INFORMATION REVIEWED FOR TASK 3
City of Columbia City	Master Plan Documents
City of Rainier	Phone Conversation with Public Works Foreman
City of Scappoose	Master Plan Documents
City of St. Helens	Online GIS and Master Plan Documents
City of Vernonia	Online GIS

Utility System Evaluation

Similar to the infrastructure criteria described above, Mackenzie developed a scoring system to evaluate the existing capacity of the utility systems to provide adequate industrial service to the inventory sites. This scoring system assigns a score of A, B, or C to the public utility system. The scores primarily reflect the proximity of utilities to the inventory sites, but they also account for utility sizes, service capacity, and complexity of expected necessary improvements.

In general, the A, B, and C scores mimic the tier system used to rate the inventory sites. Sites with a utility score of A can be expected to have industrial-level utility service currently at the site or available within six months. Utilities scored as B may have capacity issues or services that do not extend to the site but can be upgraded within seven to 30 months. A utility score of C is applied to utility systems that would require substantial service extensions, capacity upgrades, permitting challenges, or other improvements in order to serve industrial uses at the site. Table 2 below summarizes the utility scoring system used in

this study. Appendix C provides a detailed summary of the available public utilities for each site in the study, as determined from the information provided.

Table 2: Utility Evaluation Scoring Criteria		
UTILITY SYSTEM	SCORE	UTILITY EVALUATION SCORING CRITERIA
Sanitary Sewer	A	≥ 8" main located adjacent to or stubbed to site or within ~200 ft of site. No known downstream pipe or treatment capacity issues.
	B	≥ 6-8" main located within ~1,000 ft, with no known downstream deficiencies. Possible lift station needed.
	C	No nearby pipe and/or significant pump station and force main needed. Downstream conveyance and/or treatment deficiencies may be present.
Water	A	≥ 12" main adjacent or within ~200 ft, preferred loop system existing. No known low-pressure issues.
	B	≥ 8" main adjacent, or ≥ 12" main within ~1,000 ft. No pump station or pressure/treatment deficiencies.
	C	No nearby pipe and/or system deficiencies present.
Storm	A	≥ 12" public main adjacent or within ~200 ft, or ability to discharge to managed surface waters. No known capacity issues.
	B	≥ 12" main within ~500 ft; possible outfall to nearby regulated surface channel or wetland.
	C	No adjacent public storm, no available discharge point to regulated surface water.

4. Transportation

Transportation infrastructure was evaluated at a preliminary level to determine the immediate ability to develop sites in the inventory. This analysis was based primarily on the quality of the surrounding transportation system and the ability of the subject property to access that system. Specifically, the evaluation was performed by assessing the surrounding transportation system quality which was defined by local access. For the purposes of this project, local access is defined as access to the immediate (proximate) transportation system. Factors considered include:

1. Access improvements needed. Could include both on and off-site and include resolving sight distances and geometrics.
2. Frontage improvements needed. These would mostly be straightforward, so it is important to look for any specific challenges that would take longer.
3. Offsite improvements needed. This could be to mitigate capacity or geometric constraints.
4. Permitting processes such as ODOT approach, rail crossing, access easements, etc., that would typically extend the process beyond six (6) months.

For this analysis, all sites were ranked based on the above-identified criteria, as follows:

- A: All factors above can be addressed and permitted within six (6) months
- B: All factors above can be addressed and permitted within seven (7) to 30 months
- C: All factors above require more than 30 months to address

Where a site has more than one access option, the ranking is based on the least restrictive option. Appendix D provides a more detailed summary of each site's access availability, frontage improvements, potential offsite improvements, and any special permitting processes. This information was utilized in the ranking based on the time anticipated to obtain the necessary permits.

5. Market Readiness and Availability

This analysis assessed the market availability of each site and determined whether the site was currently for sale or lease, and if not, whether the owner was willing to transact³. Lack of availability to the market or unwillingness to transact did not remove the site from the inventory; however, the site moved to Tier 3. Tier 1 sites must be currently for sale or lease *or* the owner must be willing to transact. This criterion also applies to Tier 2 sites (must be currently for sale or lease *or* the owner must be willing to transact); however, Tier 2 sites may have infrastructure deficiencies that are unable to be reconciled in the Tier 1 timeframe. Tier 3 sites may not currently be for sale or lease and/or the owner may not be willing to transact. In many cases, the site is not currently for sale or lease, but the owner is willing to transact. There are also many sites in which the owner is not willing to transact. The consultant team has no way to estimate when and if the owner would be willing to transact. For example, a site could change ownership and the new owner may immediately list it for sale or lease, which would move the site up to Tier 2 (assuming no major infrastructure deficiency). In other situations, a Tier 3 site may remain a Tier 3 site for decades, until the owner becomes willing to transact.

Market availability information as shown on the site information table in Appendix A was gathered from various sources contacted by the PAG and conversations with real estate brokers as well as city economic development staff.

6. Stakeholder Engagement

This project was managed by Port of Columbia County staff and included a Project Advisory Group (PAG) to guide the project throughout. Members of the PAG reviewed methodology and draft work products and were the main decision makers throughout the project. The PAG is comprised of members of the Port of Columbia County and local jurisdictions, service providers and organizations, including the City of Scappoose, the City of St Helens, Columbia River PUD, the Columbia Economic Team, as well as the Port.

The consultant team regularly met with the PAG throughout this project to guide progress and decision-making at key project milestones.

A critical aspect of this study was to provide the PAG an opportunity to review the work, provide local input, and form a consensus regarding terminology and methods used during Tasks 2 and 3. The PAG first

³ Not currently listed on the market with a real estate broker but would sell if approached.

reviewed the draft inventory on October 28, 2021, when they were also given the opportunity to include any additional available sites, including any sites where landowners were willing to aggregate or transact on a property sale together. On November 10, 2021, the PAG was given another opportunity to review an updated version of the inventory. PAG members were asked to provide information on current infrastructure surrounding and available to serve the sites, including any known deficiencies in supply or treatment systems. The PAG also provided city, county, or utility contacts to Mackenzie, so that the consultant team could provide more specific answers regarding necessary infrastructure upgrades.

The inventory was finalized and the transportation and infrastructure analysis were completed along with the market availability criteria in November 2021. The PAG was given another opportunity to review the inventory and provide their feedback on the scoring based on the criteria on November 30, 2021. All of the project meetings, capturing key PAG input and providing a progressive record of the process through meeting minutes, were held in a virtual meeting format via Microsoft Teams.

7. Tiering Criteria and the Process to Tier the Sites

The tiering system utilized in this study was based on development readiness. Tier 1 sites are defined as “development ready” within six months of submittal of a development application (i.e., projects can receive all necessary permits and sites can be served with infrastructure within this timeframe). This timeframe is an industry standard and is the same as most recruitment/development timeframe used by staff and site selectors. The Tier 2 seven- to 30-month timeframe was for sites that would be of some interest to more patient users/developers despite being less competitive for expansions and recruitments. It was agreed upon by the PAG and the consultant team that the Tier 3 30-month or greater window represents the least competitive sites from an expansion, recruitment, or speculative development perspective. The site readiness and time to market are the determining factors used to develop tiers of sites.

The tiers are defined as follows:

Tier 1 sites are shovel ready or can be development ready within 180 days (six months) and require minimal to no additional costs or time to deliver a site. It is anticipated that no or minimal infrastructure is necessary along with due diligence and entitlements, or could be provided/obtained within this time period. The site has no use restriction and is currently on the market for sale or lease or the ownership is willing to transact.

Tier 2 sites require additional time, between seven and 30 months, and additional costs to deliver a development ready site. These sites may have a use restriction; e.g., agriculture or aviation only. They may have deficiency issues with regards to infrastructure and may also require annexation and additional entitlements that are assumed to take beyond six months’ time. These sites are currently on the market for sale or lease, or the ownership is willing to transact, or this information is not available.

Tier 3 sites require the most time, over 30 months, and significant costs to deliver a development ready site. In addition to the criteria for Tier 2, these sites may or may not be currently for sale or lease, or willingness to transact could be yes or no, or is not available.

Table 3 below shows the tiering criteria developed and used by the PAG and the consultant team to tier the sites.

Table 3: Inventory Tiering Criteria

	5 NET DEVELOPABLE ACRES	USE RESTRICTION	ANNEXATION REQUIRED	SEWER, WATER, & STORM	TRANSPORTATION	CURRENTLY FOR SALE OR LEASE		WILLINGNESS TO TRANSACT
Tier 1	Within 6 months	No	No	A or B	A	Yes	OR	Yes
Tier 2	Within 7-12 months	Yes or No	Yes	A or B	B	Yes	OR	Yes or Unknown
Tier 3	> 30 months	Yes or No	Yes	A, B, or C	C	Yes or No	OR	Yes, No, or Unknown

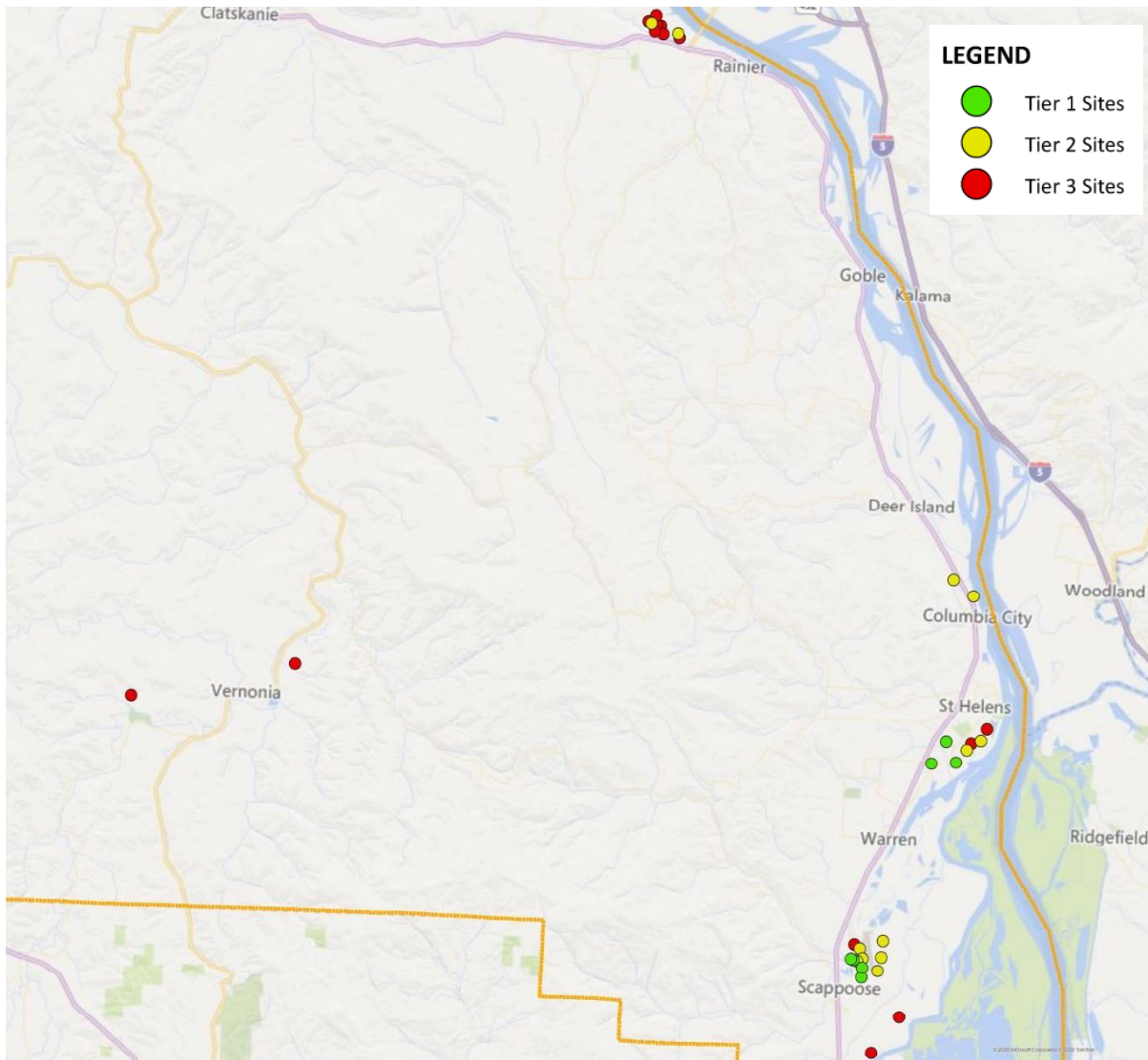
Source: Mackenzie

8. Task 3 Results: Tier 1, 2, and 3 sites

The Task 2 inventory was completed in November 2021. The findings in this report are based on the best available information as of that date. Since the inventory is market based, it is acknowledged that the inventory of industrial sites in Columbia County will change with certain regularity. Factors impacting this change will include better information provided to the consultant team, and/or PAG, site development, new properties coming on the market, properties in the inventory coming off the market due to transactions, a change in tier status based on investment or other actions, and other issues. Due to this inventory fluctuation, one of the recommendations in this report is that the industrial site inventory be updated at least annually.

Based on the methodology described above, the consultant team identified 33 industrial sites in Columbia County and municipal jurisdictions. Of these 33 sites in the inventory, seven (7) sites (21%), are Tier 1, twelve (12) sites (36%) are Tier 2, and fourteen (14) sites (42%) are Tier 3. It is important to note that many of the Tier 3 sites have significant barriers to market readiness and may never be developed for industrial purposes (some property owners may never want to sell their property). The complete inventory of sites, including individual site details, location, and tiers can be found in Appendix A and B.

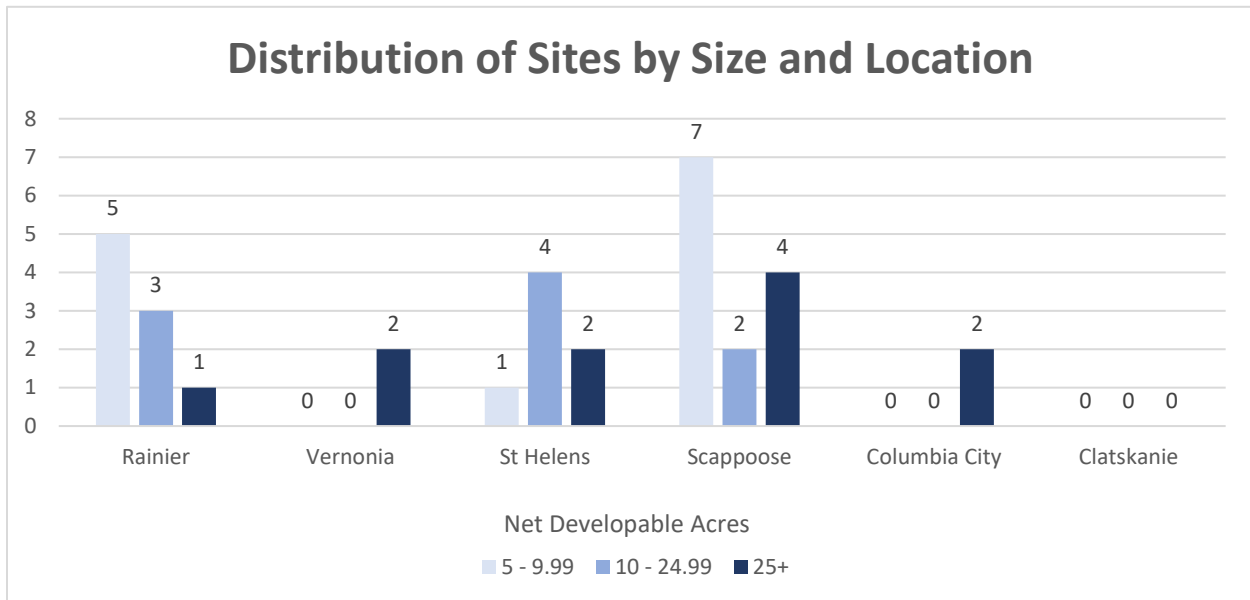
Figure 3: County Map of Tier 1, 2, and 3 Sites



Source: Mackenzie

One-third of the total inventory sites have greater than 25 net developable acres. These sites are distributed throughout Columbia County, with the City of Scappoose containing the most of these larger sites (four). However, only two of the Tier 1 sites has greater than 25 acres in net developable area to accommodate larger industrial users. Figure 4 represents the findings of the inventory as of November 2021 based on distribution by size and location. It is important to note that Clatskanie has no Tier 1, 2 or 3 sites, as there were no vacant, unconstrained sites with at least 5 acres of land zoned for industrial use. However, the PAG and consultant team deemed it appropriate to include Clatskanie in this analysis to highlight the lack of viable industrial land.

Figure 4: Distribution of Sites by Size and Location



The study found the following:

Tier 1 sites: *Available for construction within six months*

There are **seven Tier 1** development ready sites available for development opportunities in the near term, mostly in the 5 to 9.99-acre range. Tier 1 sites total approximately 110 net developable acres. Of the seven sites, four are on the market for sale and all landowners are willing to transact.

Tier 2 sites: *Available for construction within seven to 30 months*

Twelve Tier 2 mid-term sites require additional investment and policy actions to be development ready. Of the twelve (12) Tier 2 sites totaling approximately 465 net developable acres (more acre than Tier 1 and Tier 3 combined), two (2) of these sites could require assembly. Eight (8) of the sites are currently for sale or lease and the rest are willing to transact.

Tier 3 sites: *Available for construction beyond 30 months*

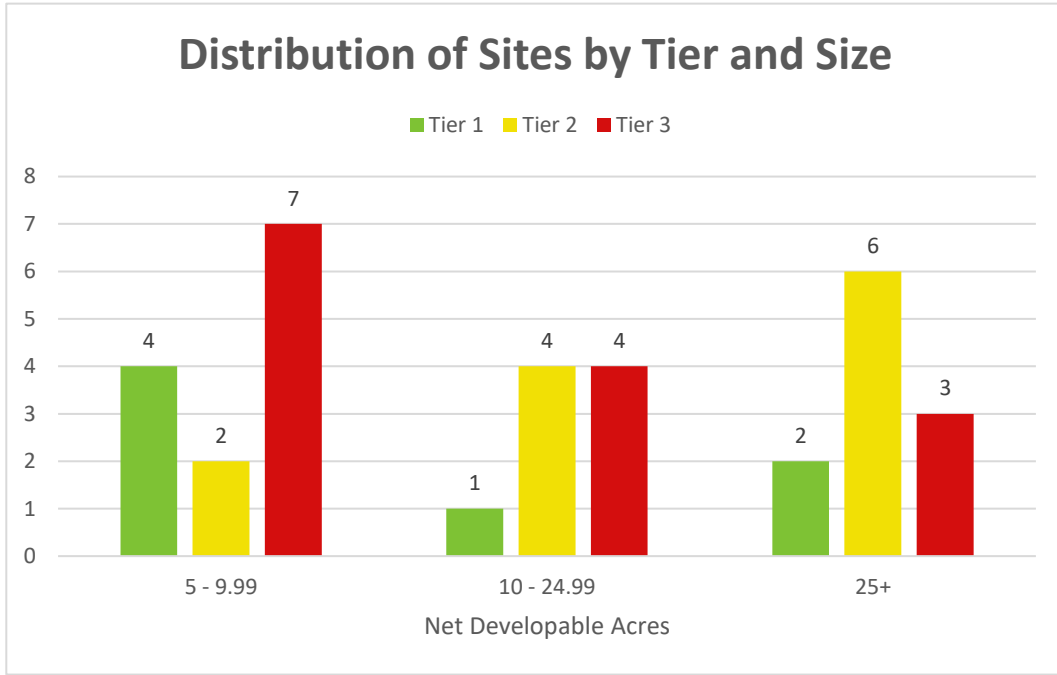
There are multiple challenges to address to bring these **14 Tier 3 sites** to market. Investment and actions required to move these sites forward include wetland mitigation, and transportation and public infrastructure improvements. Net developable acres in Tier 3 totals approximately 207 acres.

25-plus acre size sites

With respect to 25-plus acre sites, the study found:

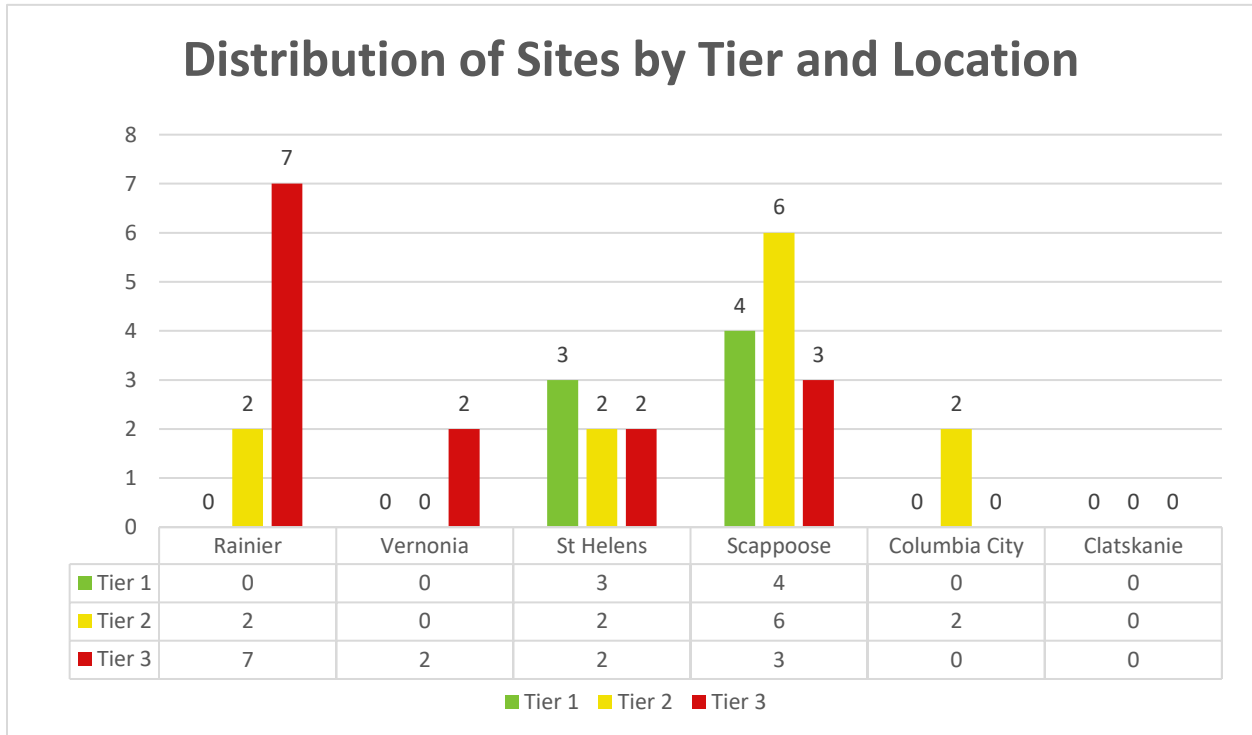
- **Two (2) Tier 1** sites: Site 16, which is located in St Helens, and Site 28 in Scappoose.
- **Six (6) Tier 2** sites: One is located in St Helens (Site 19), two in Columbia City (Sites 12 and 13), and three in Scappoose (Sites 22, 29, and 30).
- **Three (3) Tier 3** sites: This includes both of the Vernonia sites (Site 10 and site 11), and Site 1 in Rainier.

Figure 5: Distribution of Sites by Tier and Size



The study found 33 sites in 5 different jurisdictions, most of them in Scappoose (13), St Helens (7), and Rainier (9). All of the Tier 1 sites are located in either Scappoose (4 sites) or St Helens (3 sites). Both Rainier and Vernonia have zero Tier 1 sites ready for immediate development but Rainier has half of the Tier 3 sites (7 total). The city of Clatskanie has no Tier 1,2, or 3 sites.

Figure 6: Distribution of Sites by Tier and Location



9. Tier 1 Sites

Of the seven (7) Tier 1 sites, three are in the City of St Helens, and the remaining four are in the City of Scappoose. Of these sites, only sites 16 and 28 have more than 25 net developable acres, while four of the seven sites have less than 10 net developable acres.

Table 4: Tier 1 Site Summary								
SITE ID	SITE/ PROPERTY OWNER	CITY	GROSS ACRES	NET DEVELOPABLE ACRES	NUMBER OF TAXLOTS	NUMBER OF PROPERTY OWNERS	CURRENTLY FOR SALE/LEASE	WILLING TO TRANSACTION
14	PORT OF COLUMBIA COUNTY	St Helens	22.55	17.64	1	1	Yes	Yes
15	WILSON LEILA IRMELI SEPARATE PROPERTY TR	St Helens	8.13	6.72	1	1	No	Yes
16	ARMSTRONG WORLD INDUSTRIES INC	St Helens	144.21	38.64	1	1	Yes	Yes
24	OSG USA INC	Scappoose	5.9	5.9	1	1	Yes	Yes
25	CTP PARTNERS LLC	Scappoose	5.83	5.83	2	1	Yes	Yes
27	PORT OF COLUMBIA COUNTY	Scappoose	5.88	5.88	2	1	Yes	Yes
28	AIRPARK DEVELOPMENT LLC	Scappoose	29.84	29.84	2	1	Yes	Yes

10. Tier 2 Sites

The analysis found twelve (12) Tier 2 sites (seven to 30 months from development ready) within Columbia County. Five (42%) of these sites are located in unincorporated Columbia County. Six of the sites are large and contain more than 25 net developable acres. Many of these sites have some public infrastructure deficiencies, require transportation upgrades, and/or annexation.

Sites 12 and 22 have zoning use restrictions. Site 12 is zoned Resource Industrial Planned Development (RIPD), which requires a minimum lot size of 38 acres and a use limited to supporting farm use and forest products. Site 22 is zoned Airport Industrial (AI) and requires that the site is limited to aviation-supporting uses for the nearby airport. Table 5 details the Tier 2 Sites.

Table 5: Tier 2 Site Summary								
SITE ID	SITE/ PROPERTY OWNER	CITY	GROSS ACRES	NET DEVELOPABLE ACRES	NUMBER OF TAXLOTS	NUMBER OF PROPERTY OWNERS	CURRENTLY FOR SALE/LEASE	WILLING TO TRANSACTION
2	DEATON TERRY	Rainier	11.92	11.26	1	1	No	Yes
8	HILLSBERY LIV TRT & HILLSBERY FAM SUBTRT	Rainier	5.89	5.23	1	1	Yes	Yes
12	IRON TRIANGLE INVESTMENTS LLC	Columbia City	51.92	48.5	1	1	No	Yes
13	PORT OF COLUMBIA COUNTY	Columbia City	93.53	50.66	1	1	Yes	Yes
17	PORT OF COLUMBIA COUNTY	St Helens	25.53	22.65	10	10	Yes	Yes
19	CITY OF ST HELENS	St Helens	99.72	47.53	2	1	No	Yes
22	PORT OF COLUMBIA COUNTY	Scappoose	28.62	28.49	1	1	Yes	Yes
23	AIRPARK DEVELOPMENT LLC	Scappoose	21.5	21.5	1	1	Yes	Yes
26	STEVEN YETT	Scappoose	10.38	8.11	1	1	No	Yes
29	AIRPARK DEVELOPMENT LLC	Scappoose	54.82	54.61	1	1	Yes	Yes
30	AIRPARK DEVELOPMENT LLC	Scappoose	154.56	153.68	1	1	Yes	Yes
31	AIRPARK DEVELOPMENT LLC	Scappoose	12.42	12.25	1	1	Yes	Yes

Tier 3 Sites

The analysis found Fourteen (14) Tier 3 sites within Columbia County. This category of sites has multiple and significant constraints to overcome before being market ready, including public infrastructure upgrades, transportation upgrades, and annexation.

Similar to some of the sites in Tier 2, Tier 3 sites 10, 32, and 33 have use restrictions. Site 10 is located near the airport and is zoned Airport Industrial. Both sites 32 and 33 have a RIPD zoning designation, and are restricted to supporting farm and forestry uses, as well as a minimum lot size of 38 acres.

Providing a market perspective on the quality of sites is a major objective of this analysis. Market-readiness requires first and foremost, a willingness to enter into a transaction by the property owner. However, simply a lack of willingness to transact, or a lack of information of a willingness to transact, was not a reason to exclude a site in the inventory. Of the fourteen Tier 3 sites, only seven (50%) have a property owner that is willing to transact. Four of the Tier 3 sites are currently listed for sale on the market. Table 6 provides a complete list of the Tier 3 sites.

Table 6: Tier 3 Site Summary

SITE ID	SITE/PROPERTY OWNER	CITY	GROSS ACRES	NET DEVELOPABLE ACRES	NUMBER OF TAXLOTS	NUMBER OF PROPERTY OWNERS	CURRENTLY FOR SALE/LEASE	WILLING TO TRANSACT
1	CARLA JANE BLAYLOCK	Rainier	40.95	31.67	1	1	No	No
3	JOHN & CARRIE DEATON	Rainier	8.14	7.73	1	1	No	No
4	JOHN & TAMI SLAPE	Rainier	12.5	8.24	1	1	Yes	Yes
5	CARLA JANE BLAYLOCK	Rainier	16.18	12.26	1	1	Unknown	No
6	KELLY BLEDSOE & SARA MCNAIR	Rainier	7.5	7.36	1	1	No	No
7	PAUL & JESSICA HIRD	Rainier	18.51	11.51	1	1	No	No
9	MARTIN & SHANNON STENNICK	Rainier	8.93	8.6	1	1	No	Yes
10	TIM BERO	Vernonia	74.3	44.55	1	1	Yes	Yes
11	R SMEJKAL & WOLF D & D SMEJKAL & D SMEJKAL	Vernonia	55.45	31.85	1	1	No	Yes
18	PORT OF COLUMBIA COUNTY	St Helens	34.97	10.64	2	1	Yes	Yes
20	CITY OF ST HELENS	St Helens	20.95	10.4	2	1	Yes	Yes
21	MOLONY DAVID REVOCABLE TRUST	Scappoose	11.99	6.86	1	1	No	No
32	BERNET FREDERICK R REVOCABLE TRUST ET AL	Scappoose	14.06	8.55	1	1	No	No
33	WM HOLDNER & RANDAL HOLDNER	Scappoose	7.5	6.49	1	1	Yes	Yes

11. Additional Sites

There are several other industrially zoned sites that are not included in this inventory but are critical to the local economy in Columbia County. These sites fall into two categories:

1. The parcel/site is **owned by an existing company** that has future development plans of their own. Therefore, the site is not currently on the market for another prospective user to purchase/lease. The site is vacant and land banked for a designated future development (see Table 7 below).
2. The parcel/site **contains between one (1) and five (5) net developable acres** of industrial land. These sites were not large enough to meet the study criteria, which was a minimum of five (5) net developable acres. It is recognized that some users may require less than five (5) acres for their development needs, and for this reason, these sites are included in this section of the report, as a reference, for smaller user/tenant recruitment.

User Designated Sites

This analysis excluded parcels that are owned and held for future expansion by existing regional firms. These parcels are an important part of the County industrial land supply, but since they are being held by their current owners for future development, they are not considered to be available to the general market, which is the focus of this study. While these parcels may become available to the market for another potential user in the future, there is currently no way to judge if or when this might occur. There are 26 user-owned sites with at a minimum five (5) net developable acres that are being held for future development in this study.

PROPERTY OWNER	CITY	GROSS ACRES	NET DEVELOPABLE ACREAGE
LONGVIEW TIMBERLANDS LLC	Clatskanie	14.35	5.22
HAMLIK PROPERTIES LLC	Rainier	11.69	11.6
HAMLIK PROPERTIES LLC	Rainier	9.85	9.85
HAMLIK PROPERTIES LLC	Rainier	23.41	23.41
NEXT RENEWABLE FUELS OREGON LLC	Clatskanie	25.52	20.14
DYNO NOBEL INC	Columbia City	61.04	60.84
KNIFE RIVER CORPORATION - NORTHWEST	Columbia City	6.04	6.04
WEYERHAEUSER NR COMPANY	St Helens	82.2	81.82
PORTLAND GENERAL ELECTRIC COMPANY	St Helens	6.75	6.75
LETICA CORPORATION	St Helens	17.09	15.01
LETICA CORPORATION	St Helens	20.68	20.44
OLYMPIC FOREST PRODUCTS CO INC	Clatskanie	36.05	32.61
PORT OF COLUMBIA COUNTY	Clatskanie	52.68	27.67
PORT OF COLUMBIA COUNTY	Clatskanie	30.63	26.48
PORT OF COLUMBIA COUNTY	Clatskanie	8.04	5.63
PORT OF COLUMBIA COUNTY	Clatskanie	20.19	10.26
PORT OF COLUMBIA COUNTY	Clatskanie	176.4	18.36
PORT OF COLUMBIA COUNTY	Clatskanie	46.5	10.26

PORT OF COLUMBIA COUNTY	Clatskanie	207.36	47.49
STIMSON LUMBER CO	Clatskanie	75.52	10.26
STATE OF OREGON - DEPT OF STATE LANDS	Rainier	114.68	14.51
UNITED STATES GYPSUM	Rainier	117.16	23.31
COLUMBIA COUNTY	St Helens	9.18	5.83
COLUMBIA COMMUNITY MENTAL HEALTH	St Helens	5.67	5.03
PORT OF COLUMBIA COUNTY	St Helens	19.06	15.11
PORTLAND COMMUNITY COLLEGE	Scappoose	17.24	16.34
PATRICIA HAVLIK	Scappoose	9.74	9.67

One- to Five-Acre Sites

There are 108 other sites that were excluded from the inventory because they did not exceed the threshold of five (5) net developable acres. These parcels are important to note because they help provide an understanding of how environmental constraints affect the supply of industrial sites within the County and municipal jurisdictions. In addition, there is a market need for industrial sites in the one- to five-acre range as well, throughout the County. These sites are presented in the table below.

Table 8: One- to Five-Acre Sites			
PROPERTY OWNER	CITY	GROSS ACRES	NET DEVELOPABLE ACRES
STEVEN & JANICE OLIVA	Rainier	1.86	1.22
COLUMBIA RIVER PUD	Rainier	1.96	1.96
CHARLES DUVENICK & TERESA KLUTHE	Rainier	3.12	3.12
JEFFREY STENNICK	Rainier	4.8	4.8
JEFFREY & TERRI HINKLE	Rainier	4.51	3.01
HILLSBERY LIV TRT & HILLSBERY FAM SUBTRT	Rainier	9.62	3.3
DOUGLAS & LINDA RUMRILL	Rainier	2.5	2.5
THEOBALD KEVIN	Rainier	5	5
EUGENE & LINDA THOMPSON	Rainier	5	4.72
KEVIN THEOBALD	Rainier	2.5	2.5
COLUMBIA COUNTY	Rainier	2	2
JOHN & TAMI SLAPE	Rainier	3.35	3.35
BARGER ALEX	Rainier	1.65	1.65
GUY & TANYA TOW	Rainier	3	3
NORMAN & ANGELA REED	Rainier	1	1
MICHAEL BRUSCO	Rainier	2.5	2.5
ALLEN PELLHAM	Rainier	2	2
DAWN GRIFFITH	Rainier	1	1
JULIE HINSHAW	Rainier	2.5	2.5
DOROTHY HARTLEY & RANDY RENNELS	Rainier	2.13	2.13
COLUMBIA COUNTY	Rainier	31.14	4.14

Table 8: One- to Five-Acre Sites

PROPERTY OWNER	CITY	GROSS ACRES	NET DEVELOPABLE ACRES
SWAN DAVID & LINDA REV LIVING TRUST	St Helens	3.34	3.34
PORT OF COLUMBIA COUNTY	Clatskanie	82.05	1.89
OR DOT HWY DIV	Clatskanie	1.41	1.41
CITY OF CLATSKANIE	Clatskanie	3.42	1.33
CLARKE LLC	Rainier	4.41	4.41
DYNO NOBEL INC	Columbia City	18.09	3.72
KNIFE RIVER CORPORATION - NORTHWEST	Columbia City	45.83	2.73
DYNO NOBEL INC	Columbia City	6.94	2.63
KNIFE RIVER CORPORATION - NORTHWEST	Columbia City	25.66	4.64
COLUMBIA COUNTY	St Helens	2.03	2.03
DAVE AND JILL LAWRENCE	St Helens	1.03	1.03
FLYING F LLC	St Helens	3.49	2.88
PORT OF COLUMBIA COUNTY	St Helens	3.44	3.43
CITY OF ST HELENS	St Helens	1.95	1.04
COLUMBIA RIVER PUD	St Helens	1.18	1.17
CITY OF ST HELENS	St Helens	9.73	2.98
PORT OF COLUMBIA COUNTY	St Helens	1.22	1.08
PORT OF COLUMBIA COUNTY	St Helens	1.44	1.13
COLUMBIA COUNTY	St Helens	10.68	1.57
PORT OF COLUMBIA COUNTY	St Helens	2.44	2.23
GARY KERVIN	St Helens	1.19	1.19
WILSON LEILA IRMELI SEPARATE PROPERTY TR	St Helens	2	2
STORAGE PAL LLC	St Helens	1.54	1.54
SEAFORD LLP	St Helens	2.44	2.44
IVES & SCHLUMBERGER	St Helens	3.91	1.57
OHM EQUITY PARTNERS LLC	St Helens	1.88	1.88
JLJ EARTHMOVERS LLC	St Helens	2.22	2.22
COLUMBIA COMMUNITY MENTAL HEALTH	St Helens	4.16	2.66
ERIK & SHANNON KOELZER	St Helens	2.21	2.21
ERIC DAHLGREN	St Helens	2.01	1.59
PORT OF COLUMBIA COUNTY	St Helens	3.5	2.33
RODNEY & SABRINA MOORE	St Helens	1.4	1.4
JOHNS J F JOHNS LS & JOHNS K A	St Helens	2.49	2.49
PORT OF COLUMBIA COUNTY	St Helens	2.97	2.1
RODNEY & SABRINA MOORE	St Helens	4.12	1.43
PORT OF COLUMBIA COUNTY	St Helens	1.55	1.55
PORT OF COLUMBIA COUNTY	St Helens	3.49	2.86

Table 8: One- to Five-Acre Sites

PROPERTY OWNER	CITY	GROSS ACRES	NET DEVELOPABLE ACRES
PORT OF COLUMBIA COUNTY	St Helens	12.65	2.19
PORT OF COLUMBIA COUNTY	St Helens	2.62	2.62
PORT OF COLUMBIA COUNTY	St Helens	1.98	1.58
PORT OF COLUMBIA COUNTY	St Helens	1.13	1.13
PORT OF COLUMBIA COUNTY	St Helens	145.24	2.74
EF2 LLC	Scappoose	2.15	1.81
SHERRY QUARRY & JERI ANDERSON	Scappoose	1.58	1.58
TRAVIS DECKER & ROBERT DORSTE	Scappoose	1.77	1.63
LOHRKE & MOLONY & MOLONY D REV TRT	Scappoose	1.45	1.45
JEFFERY MASOG & LISA YATABE ARISU	Scappoose	2.17	1.96
DANA PARKER	Scappoose	1.24	1.24
KEITH & CHRISTINA SETTLE	Scappoose	3.34	3.03
DANNY HACKENBERG & DANNY WAYNE JR	Scappoose	3.07	2.94
KEITH & CHRISTINA SETTLE	Scappoose	9.38	1.42
BERNET FREDERICK R REVOCABLE TRUST ET AL	Scappoose	9.16	3.17
DIKESIDE MOORAGE INC	Scappoose	1.42	1.42
JEFF INGEBRIGTSEN	Scappoose	1.19	1.19
STEVEN & STEVEN JR MAHAR	Scappoose	1.1	1.1
DIKESIDE MOORAGE INC	Scappoose	2.48	2.48
ELK CREST LAND COMPANY	Scappoose	3.42	3.42
FAMILY TRUST OF PIZZO DAVID ALLEN	Scappoose	1.54	1.54
JAMES EDWARD PETERSEN & CECILIA NG	St Helens	4.61	4.61
EF2 LLC	Scappoose	11.33	3.06
CASEY MITCHELL	Vernonia	10.14	1.42
KEVIN THEOBALD	Rainier	2.5	2.5
KEVIN THEOBALD	Rainier	2.5	2.5
KEVIN THEOBALD	Rainier	2.5	2.5
COLUMBIA RIVER PEOPLES UTILITY DISTRICT	Scappoose	1.05	1.05
LOHRKE R & MOLONY D & MOLONY D REV TRT	Scappoose	1.4	1.4
BRIAN M ABEL	Rainier	5.45	0.51
KEVIN THEOBALD	Rainier	5	0.04
MICHEAL E JR BRUSCO	Rainier	5.13	0.34

Table 8: One- to Five-Acre Sites			
PROPERTY OWNER	CITY	GROSS ACRES	NET DEVELOPABLE ACRES
STATE OF OREGON - DEPT OF STATE LANDS	Rainier	6.22	1.13
HILLSBERY LIV & HILLSBERY FAMILY TRUSTS	Rainier	12.14	2.42
BERNET FREDERICK R REVOCABLE TRUST ET AL	Columbia City	32.13	1.66
COLUMBIA COUNTY*	St Helens	7.18	6.24
CITY OF ST HELENS*	St Helens	48.15	7.82
WILSON LEILA IRMELI SEPARATE PROP TRT	St Helens	7.82	2.31
COLUMBIA COUNTY	St Helens	6.16	0.6
MOLONY DAVID REVOCABLE TRUST	Scappoose	9.61	4.83
S&R DEVELOPMENT LLC	Scappoose	1.73	1.73
S&R DEVELOPMENT LLC	Scappoose	1.87	1.87
WESTON INVESTMENT CO	Scappoose	2.9	2.9
WESTON INVESTMENT CO	Scappoose	4.13	4.13
BERNET FREDERICK R REVOCABLE TRUST ET AL	Scappoose	5.5	2.89
DAVID THOMPSON*	Columbia City	146.13	11.37
BERNET FREDERICK R REVOCABLE TRUST ET AL*	Columbia City	86.71	5.85
AIRPARK DEVELOPMENT LLC*	Scappoose	124.09	90.32
SCOTT PARKER	Scappoose	65.74	0.9
CITY OF VERNONIA*	Vernonia	16.65	16.37
CITY OF VERNONIA*	Vernonia	31.21	20.32

Source: Mackenzie

*Denotes that the site is included on this table due to confirmation from PAG, jurisdiction staff, and/or property owners to confirm boots on the ground site development constraints that result in less than five (5) net developable acres. Although the GIS analysis performed by Mackenzie during Task 2, as described above identified five (5) acres of net developable acres or more, there was better and more recent and accurate information from other sources provided, which was incorporated into this report.

INVENTORY CONCLUSIONS

While this analysis has identified the available industrial sites, and at a high level, outlined the challenges that exist to bringing Tier 2 or 3 sites to development-ready status, the timeframes in the analysis assume that the jurisdictions, property owners, land-use regulatory bodies, and potential interveners are all working in support of the site's development and that appropriate public investments will be made to move these sites to market.

It is important to note that this inventory is a snapshot in time. As Tier 1 sites are absorbed by the marketplace, Tier 2 sites will continue to move to Tier 1 status and Tier 3 sites will continue to move to Tier 2. The inventory will be updated over time to ensure the database of market-ready industrial sites is current, to help identify and prioritize required site readiness investments, and support recruitment and expansion efforts.

The intent of the project is to allow for continual updates and a commitment from the PAG to maintain the effort. As updates to sites become known, such as utility or infrastructure extensions, the PAG will revise the inventory accordingly.

The experience of economic development practitioners in Columbia County indicates that accomplishing the County's industrial retention, expansion, and recruitment goals depends in part on the availability of an adequate supply of industrial sites that is appropriately located, priced, and developable. The inventory can be used as a reference for monitoring and tracking changes of absorption of industrial land in the County and can also be used by the public sector as the basis for making informed land use and investment decisions around the supply, regulation, and market readiness of industrial lands.

As the economy continues to recover from the COVID-19 pandemic and demand increases due to business growth and investment, additional strategies to increase the supply of land ready for development will be needed. This study is intended to inform policy makers and the economic development practitioners on the current supply of land ready for development, and some of the challenges to maintaining a supply of land ready for development.

In order to provide land supply to meet projected population and industrial growth within the County, create industrial jobs, and achieve a sustainable tax base critical to public services, state and regional policymakers must work for an accurate and practical industrial land inventory and prioritize policy actions and investments to address industrial site readiness.