



St. Helens Economic Opportunity Analysis

City Council and Planning
Commission Joint Quarterly
Meeting

June 12, 2024





CITY OF ST. HELENS

ECONOMIC OPPORTUNITIES ANALYSIS

November 12, 2008

Why do an EOA?

- Legal requirements (Goal 9: Economy)
- Understand existing conditions and forecast future conditions to inform:
 - ◆ Economic development strategy
 - ◆ Land use policy
 - ◆ Coordination
- Plan for long-term growth
 - ◆ Next 20 years



Image Source: St. Helens Main Street Alliance

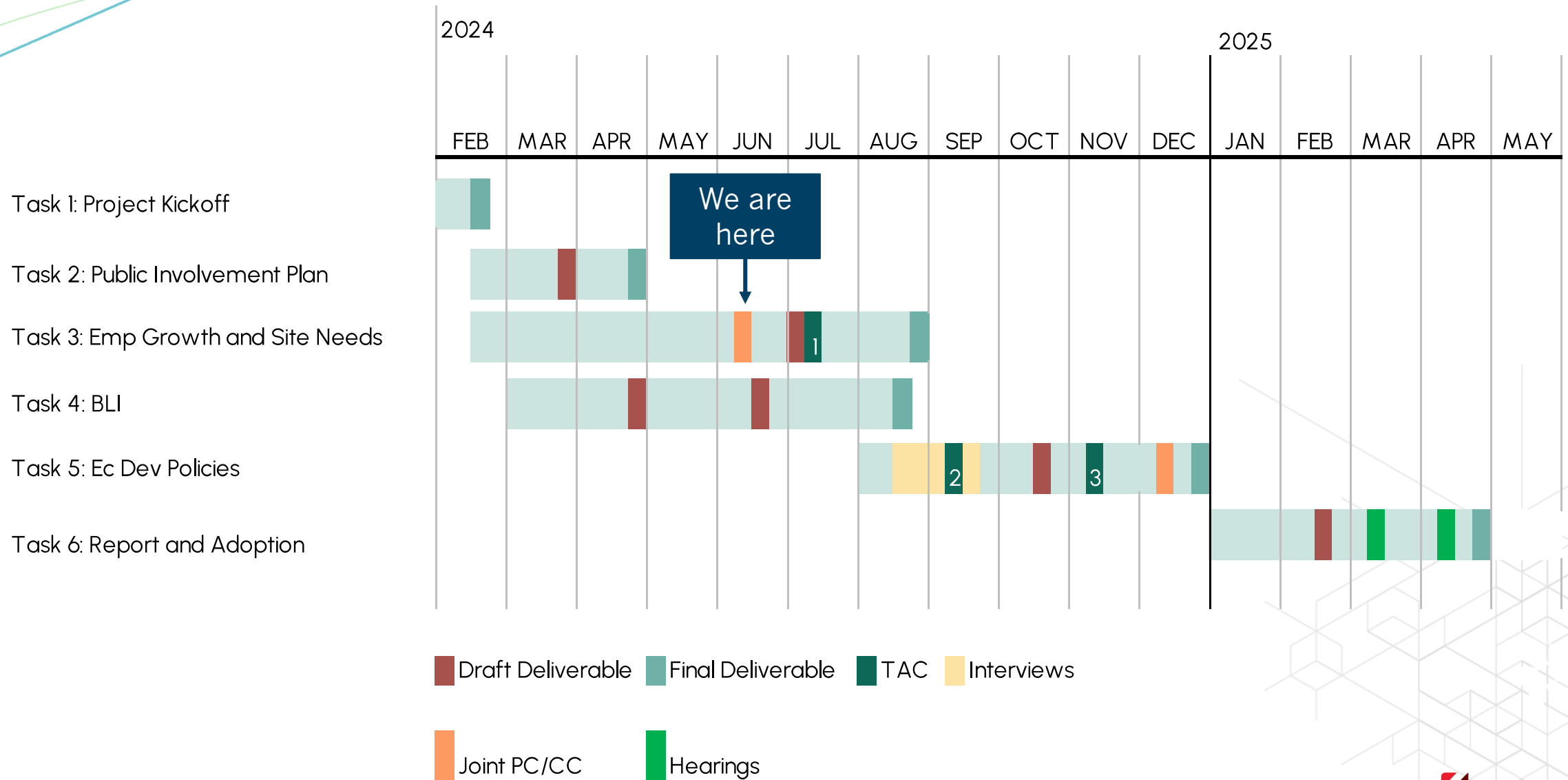
Project Products

- Economic Opportunities Analysis (EOA)
 - ◆ Technical document, meant to meet Goal 9 requirements
- Recommendations for Comprehensive Plan policy changes and actions to implement



Image Source: St. Helens Facebook page

Project Schedule



Buildable Lands Inventory

St. Helens Buildable Land Inventory

Comprehensive Plan Designations



0 0.25 0.5 1 Miles

 City Limits  UGB

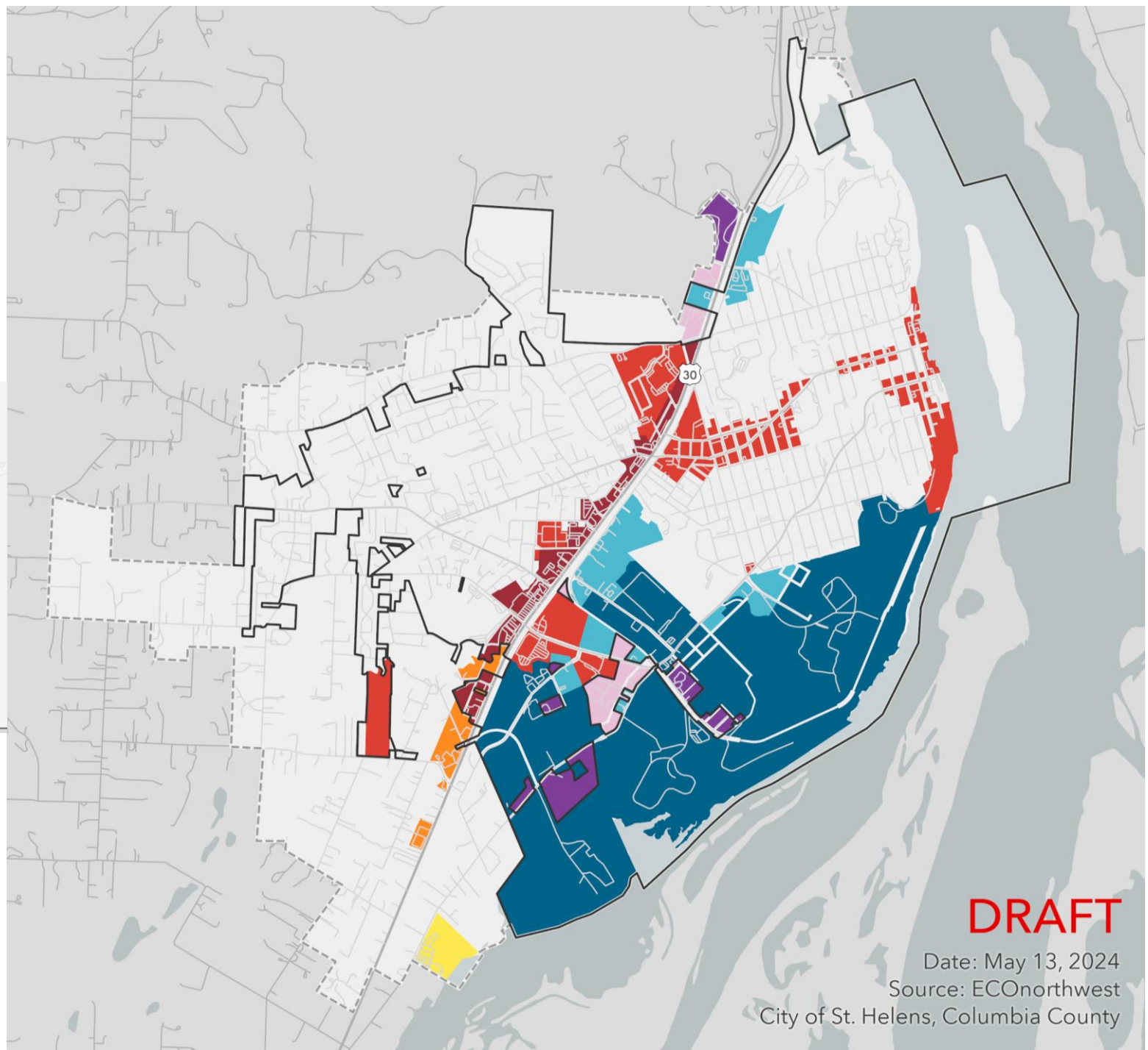
Comprehensive Plan Designations

Incorporated

-  General Commercial (GC)
-  Highway Commercial (HC)
-  Light Industrial (LI)
-  Heavy Industrial (HI)

Unincorporated

-  Unincorporated General Commercial (UGC)
-  Unincorporated Highway Commercial (UHC)
-  Unincorporated Light Industrial (ULI)
-  Unincorporated Heavy Industrial (UHI)



DRAFT

Date: May 13, 2024

Source: ECONorthwest

City of St. Helens, Columbia County

St. Helens Buildable Land Inventory

Constraints




0 0.25 0.5 1 Miles

 City Limits

 UGB


Constraints

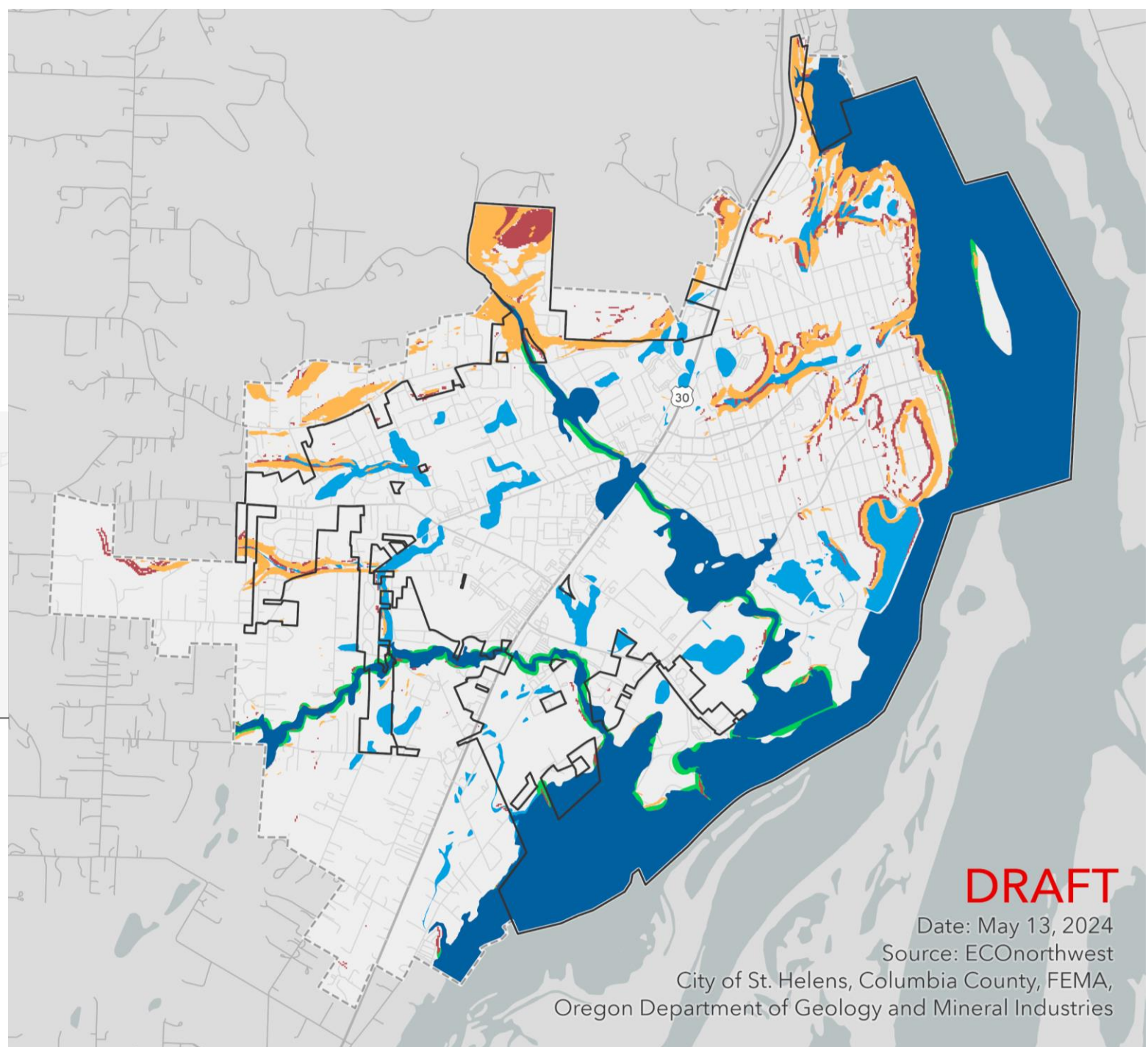
 FEMA Regulatory
Floodway and 100-Year
Floodplains

 Landslide Susceptibility
"High" or "Very High"

 Riparian Corridors

 Slopes Greater Than 15%

 Wetlands & Protection
Zones



DRAFT

Date: May 13, 2024

Source: ECONorthwest

City of St. Helens, Columbia County, FEMA,
Oregon Department of Geology and Mineral Industries

St. Helens Buildable Land Inventory

Unconstrained Vacant and Partially Vacant* by Comprehensive Plan Designation



City Limits



UGB

Comprehensive Plan Designations

Incorporated

- General Commercial (GC)
- Highway Commercial (HC)
- Light Industrial (LI)
- Heavy Industrial (HI)

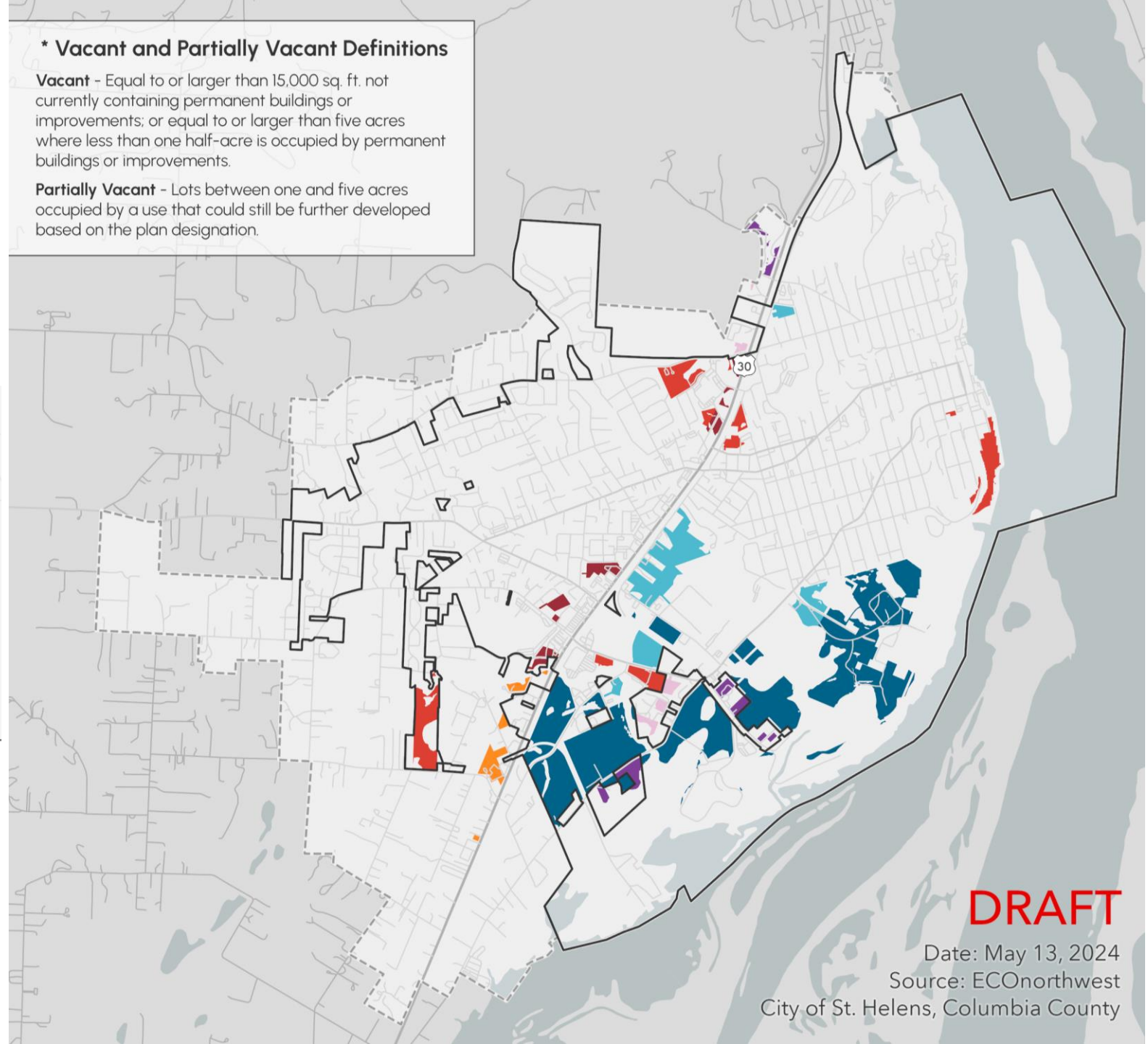
Unincorporated

- Unincorporated Highway Commercial (UHC)
- Unincorporated Light Industrial (ULI)
- Unincorporated Heavy Industrial (UHI)

* Vacant and Partially Vacant Definitions

Vacant - Equal to or larger than 15,000 sq. ft. not currently containing permanent buildings or improvements; or equal to or larger than five acres where less than one half-acre is occupied by permanent buildings or improvements.

Partially Vacant - Lots between one and five acres occupied by a use that could still be further developed based on the plan designation.



DRAFT

Date: May 13, 2024

Source: ECONorthwest

City of St. Helens, Columbia County

Unconstrained Vacant Lands

Total Unconstrained Buildable Acres: 302

80% of buildable land is Industrial, mostly in the Heavy Industrial designation

Plan Designation	Total Buildable Acres
Incorporated	280
General Commercial (GC)	42
Highway Commercial (HC)	10
Light Industrial (LI)	46
Heavy Industrial (HI)	181
Unincorporated	22
Unincorporated Highway Commercial (UHC)	6
Unincorporated Light Industrial (ULI)	5
Unincorporated Heavy Industrial (UHI)	11
Total	302

Employment Growth Opportunities and Forecast

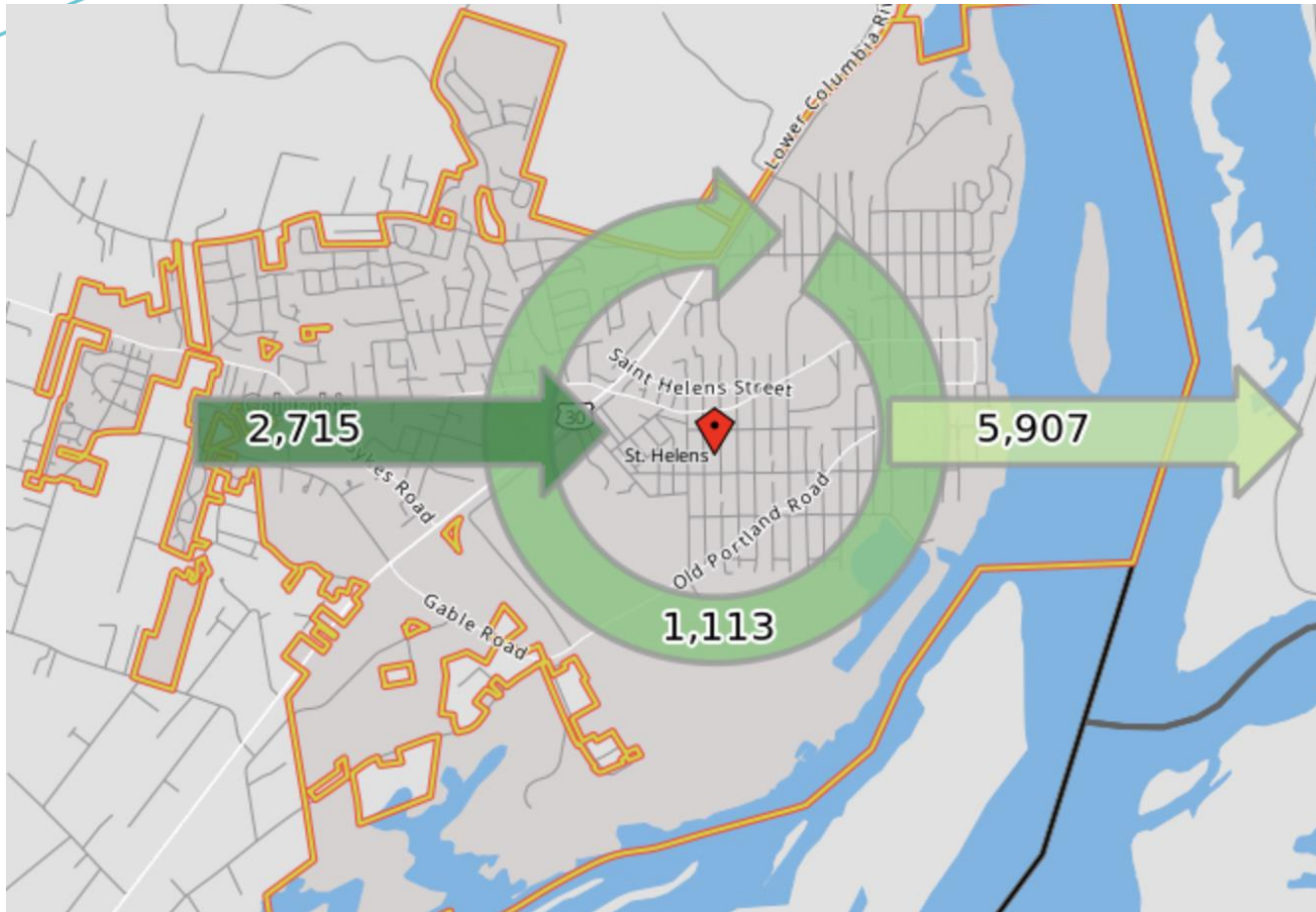
National and State Economic Trends

- Slowing labor force growth offset by increased productivity gains
- Shifts in Oregon's high growth industries
 - ◆ Slowing job growth in high tech and timber industries
- Increases in automation across sectors
 - ◆ AI is expanding automation possibilities
 - ◆ Lower and middle wage jobs at higher risk
- Aging population driving the need for replacement workers

National and State Economic Trends

- Continued transformation of the retail sector
 - ◆ Growth of ecommerce
- Increased remote work trends
- Rising energy prices and shifting sources
- Potential impacts of climate change





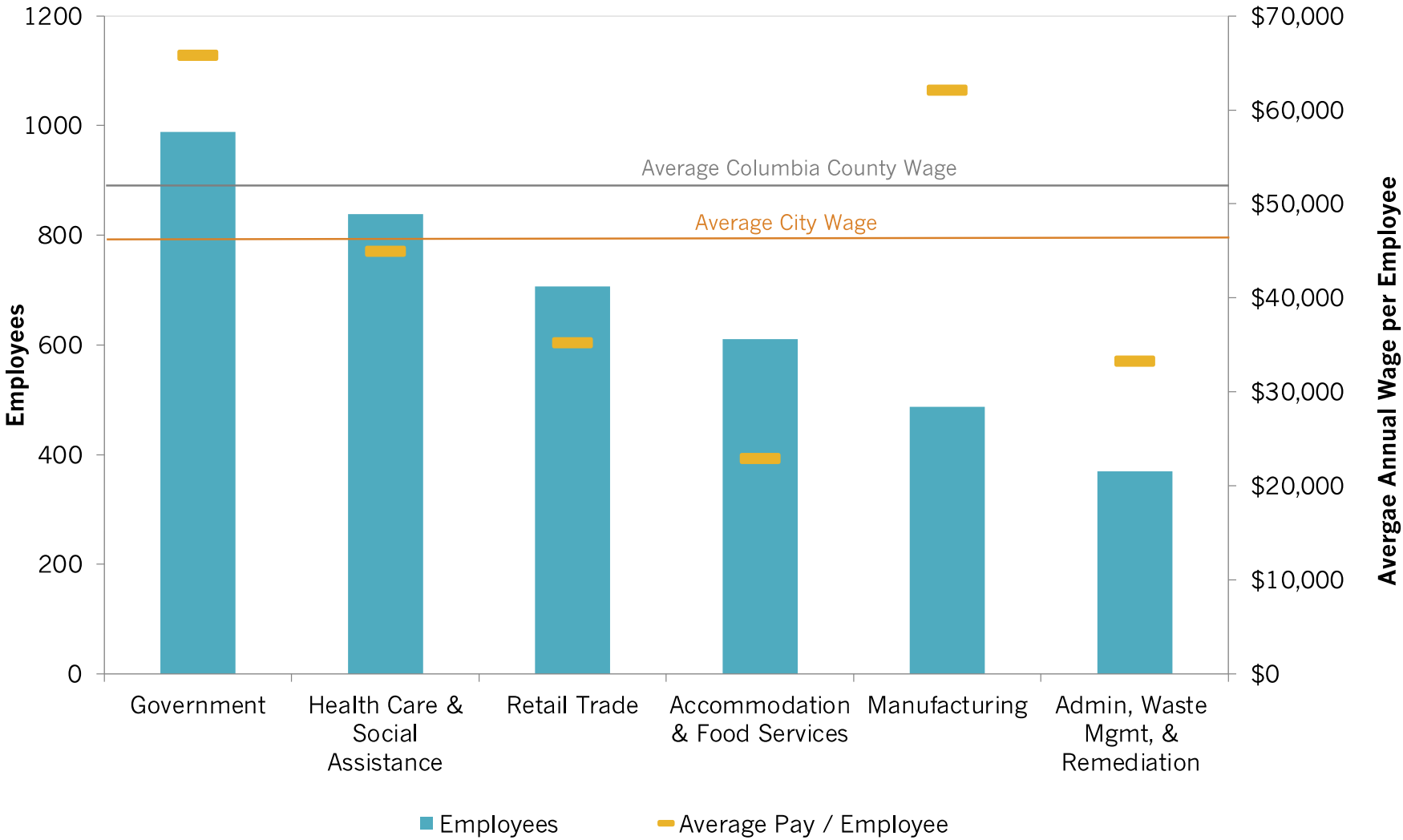
Source: Census OnTheMap, 2021

Commuting out of St. Helens is common

- 29% of jobs in St. Helens are held by people who live and work in St. Helens
- 71% of people who work at businesses in St. Helens live elsewhere
 - ◆ Portland
 - ◆ Scappoose
 - ◆ Columbia City
- Of the employed residents in St. Helens, 16% work within the city limits. Common work destinations for St. Helens residents include:
 - ◆ Portland
 - ◆ Hillsboro
 - ◆ Scappoose

Employment in St. Helens

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



Average Wage
 (2022)

 Columbia County:
 \$51,135

 St. Helens:
 \$46,490

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

Employment in St. Helens

Change in Covered Employment by Industry, St. Helens UGB, 2008-2022

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

St. Helens had 4,870 covered jobs in 2022.

St. Helens added 88 jobs at an average annual growth rate of 0.13% between 2008 and 2022.

St. Helens sectors with the higher-than-average city wages (\$46,490) in 2022 are highlighted in blue

Source: Oregon Employment Department, Quarterly Census of Employment and Wages, 2008-2022.

- **What are the advantages and disadvantages for economic development in St. Helens?**
- **What are your goals for economic development in St. Helens?**
- **What are the barriers to achieving these goals?**



Image Source: St. Helens Facebook page

Employment Forecast, St. Helens UGB, 2025-2045

Employment Base: Estimate 2022 Total
 In 2022 there were about 7,164 jobs in St. Helens

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

Two “safe harbor” options

1. OED growth rate for Columbia Region (0.89%)
2. PSU population growth rate for St. Helens (0.47%)

Conclusion: St. Helens likely has enough industrial land but may be low on commercial land depending on growth scenario.

Next Steps

- Finalize employment forecast and land sufficiency
- First Technical Advisory Committee (TAC) meeting: July 10, 2024
- Next Joint PC/CC Meeting: TBD
 - ◆ Discuss Comprehensive Plan policy changes and actions to implement