ECOnorthwest

November 2025

City of Wilsonville
Economic Opportunities Analysis

DRAFT

Prepared for: City of Wilsonville

ECOnorthwest
920 SW 6th Ave · Suite 1400 · Portland, OR 97204 · 503-222-6060

Acknowledgments

ECOnorthwest prepared this report with support from the guidance and input of several partners, including members, staff, and leadership of the City of Wilsonville. This work was funded by Metro. The contents of this report do not necessarily reflect the views or policies of Metro.

Technical Advisory Committee
Nick Triska, Greater Portland Inc.
Jeff Hampton, Business Oregon
Kevin Ferrasci O'Malley, Wilsonville Chamber of Commerce
David Tetrick, Metro
Amy Pepper, City of Wilsonville
Keith Katko, City of Wilsonville

City of Wilsonville
Miranda Bateschell, Planning Director
Daniel Pauly, Planning Manager
Cindy Luxhoj, Associate Planner
Matt Lorenzen, Economic Development Manager

ECOnorthwest
Beth Goodman, Project Director
Nicole Underwood, Project Manager
Barrett Lewis, GIS Specialist

City of Wilsonville Contact:
Miranda Bateschell
Planning Director
503-570-1536
bateschell@wilsonvilleoregon.gov

ECOnorthwest Contact:
Beth Goodman, Project Director
541-505-7208
goodman@econw.com

Table of Contents

Executive Summary 1

1. Introduction 7

2. Economic Trends Shaping Wilsonville's Future 11

3. Employment Growth and Site Needs 53

4. Buildable Lands Inventory 69

5. Land Sufficiency and Conclusions 80

Appendix A. National, State, and Local Economic Trends 84

Appendix B. Buildable Lands Inventory Methodology 113

Executive Summary

The City of Wilsonville last completed an Economic Opportunities Analysis (EOA) in 2012. Since then, the City and the broader region have experienced significant economic changes driven by changes in the businesses located and growing in Wilsonville, evolving real estate market conditions, the COVID-19 pandemic, and shifts in national and state policies and priorities. One of Wilsonville's most important opportunities for future economic growth is the continued industrial development of the Coffee Creek area and Basalt Creek area (which includes West Railroad) which together form a key part of the Portland region's southern industrial land inventory.

This updated EOA aligns with Statewide Planning Goal 9 and the Goal 9 Administrative Rule (OAR 660-009). It provides an updated forecast of employment growth from 2026 to 2046, evaluates the City's available commercial and industrial land supply, and assesses whether it is sufficient to meet expected demand. The report also identifies the City's competitive advantages and target industries. Together, these findings form the technical foundation for the Economic Development Strategy (EDS), which offers recommendations to help Wilsonville maintain its position as a strong regional employment center.

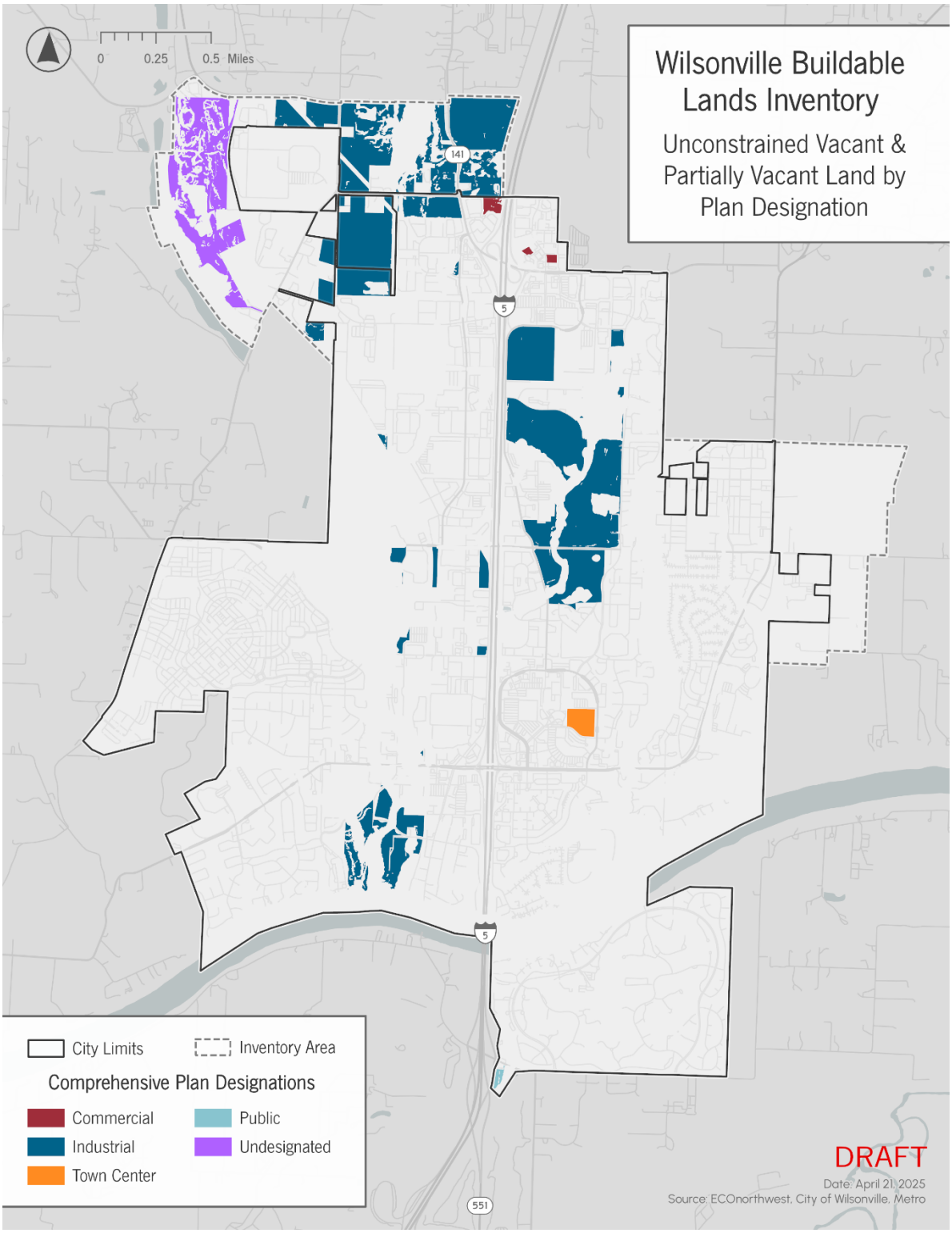
PURPOSE OF THIS ECONOMIC OPPORTUNITY ANALYSIS

- **Forecast the amount of land needed to accommodate the future employment growth within Wilsonville between 2026 and 2046.**
- **Evaluate the existing employment land supply within the City to determine if it is adequate to meet that need.**
- **Help the City understand its economic opportunities in the context of Wilsonville's competitive advantages and disadvantages.**
- **Fulfill state planning requirements for a twenty-year supply of employment land.**

How much buildable employment land does Wilsonville currently have?

Wilsonville has 2,396 acres designated for commercial or industrial use within City limits and urban growth area (UGB). Of these, approximately 366 acres (15%) are vacant, unconstrained and buildable as shown in **Exhibit 1.** Of the buildable land, 353 acres (96%) are designated for industrial development, and 13 acres (4%) are set aside for commercial uses.

Exhibit 1. Buildable Employment Land by Comprehensive Plan Designation, Wilsonville City Limits and UGB Area, 2025



Source: ECOnorthwest analysis, City of Wilsonville, Metro

Much of Wilsonville's vacant industrial land is located within the Coffee Creek and Basalt Creek planning areas which are in the northern portion of the City. Some of Coffee Creek has been annexed into the City but most is still unincorporated. The area benefits from an established Urban Renewal District that can help fund infrastructure improvements and support land assembly. Basalt Creek, which is also currently outside City limits, is in the process of having zoning established in preparation for future annexation, which would happen in conjunction with proposed development. The area faces challenges related to fragmented ownership, the presence of existing contractor establishments that provide economic activity but at lower assessed values and lower employment densities than typical urban industrial areas, and limited infrastructure to support new development.

How much growth is Wilsonville planning for?

Wilsonville's employment base is projected to grow from 33,165 employees in 2026 to 39,297 employees by 2046, an increase of about 6,132 jobs over the 20-year planning period. *(See Chapter 3, "Employment Growth and Site Needs," for methodology and additional details.)*

How much land will be required for employment?

Employment growth over the 2026-2046 period is expected to create demand for about 321 gross acres of industrial land and 110 gross acres of commercial land. *(See Chapter 3, "Employment Growth and Site Needs," for methodology and additional details.)*

Does Wilsonville have enough land to accommodate employment growth?

Wilsonville has a sufficient supply of vacant industrial land to accommodate projected growth, with a modest surplus of about 32 acres. However, many vacant industrial sites are small and/or lack urban-level infrastructure, which limits short-term development potential. Assembling larger contiguous sites and investing in infrastructure will be important to meeting long-term industrial needs.

In contrast, the City has a limited supply of vacant commercial land to accommodate forecasted employment growth but considerable redevelopment potential. Wilsonville currently has about 13 acres of vacant commercial land, compared to an estimated need of roughly 110 acres. The City can address this shortfall primarily through the redevelopment and reuse of existing properties, particularly within the Town Center and along established commercial corridors such as Wilsonville Road. Several large vacant buildings, including the former Albertsons, Rite Aid, Regal Cinema, and Fry's Electronics, offer near-term opportunities for reuse or redevelopment. Together, these

known sites account for about 50 acres of redevelopment potential. The City may also consider allowing limited commercial uses in select industrial areas to support employment growth and help balance future land needs. *(See Chapter 4, "Buildable Lands Inventory," and Chapter 5, "Land Sufficiency and Conclusions," for detailed findings.)*

What are Wilsonville's key growth opportunities?

Wilsonville's economy is shaped by several strengths and challenges that influence its ability to attract and retain businesses.

(See Chapter 2, "Factors Affecting Future Economic Growth," for detailed discussion of regional trends and competitive position. See Chapter 3, "Employment Growth and Site Needs," for details on Wilsonville's target industries.)

KEY COMPETITIVE ADVANTAGES

- **Opportune Location:** Wilsonville's position at the southern edge of the Portland region along the I-5 corridor provides access to major transportation routes, regional labor markets, and nearby industrial employment centers in Tualatin and Sherwood. Its proximity to both urban and rural amenities enhance its appeal to employers and residents.
- **Industrial Land Supply:** The City has a substantial inventory of industrial land, with much of the vacant land located in Coffee Creek and Basalt Creek. These areas can support manufacturing, logistics, and other traded-sector businesses.
- **Established Industrial Base.** Wilsonville has a strong foundation of existing industrial and traded-sector employers, creating a stable economic base and opportunities for supply chain growth.
- **Labor Market.** Wilsonville benefits from a large and well-educated workforce drawn from both the Portland metropolitan area and the Mid-Valley labor sheds.
- **Redevelopment Potential.** Town Center and several large vacant commercial buildings, such as the former Albertsons, Rite Aid, Regal Cinema, and Fry's Electronics sites, offer near-term opportunities for adaptive reuse and reinvestment in retail and service uses.

KEY CHALLENGES

- **Limited Supply of Development-Ready Industrial Sites.** Much of Wilsonville's vacant industrial land lacks urban-level infrastructure.

Fragmented ownership and small lot sizes compound this issue and create barriers to assembling larger sites more suitable for modern industrial uses.

- **Lower-Intensity Existing Uses on Industrial Land.** Contractor establishments and outdoor storage on industrial land provide some economic benefit but limit higher-intensity, higher-value development.
- **Power Supply Issues.** Some future industrial users may need more than 5 megawatts of power. Meeting this demand will require additional investment in power infrastructure and long lead times.
- **Traffic and Congestion.** The I-5 corridor experiences congestion, particularly during peak hours, which can impact key arterials in the City and delay freight movement.
- **Housing and amenities.** High regional housing costs, combined with a limited range of local services and amenities such as restaurants, shopping, and entertainment options in Wilsonville, may hinder the City's ability to attract and retain workers.

TARGET INDUSTRIES

The EOA identifies a mix of industries that are expected to drive Wilsonville's future growth:

- **Manufacturing.** Manufacturing is a cornerstone of Wilsonville's economy, supported by the region's strong workforce, established industrial employers, and proximity to suppliers and markets along I-5. Growth opportunities in this sector include advanced manufacturing, clean technology, and specialized production that build on regional strengths, the City's skilled labor force and available industrial land.
- **Wholesale Trade and Logistics.** This sector benefits from Wilsonville's central location and convenient access to both the Portland and Mid-Valley markets. Wholesale and logistics firms play a key role in regional supply chains and rely on available industrial land with strong highway access to support efficient goods movement.
- **Professional, Scientific, and Technical Services.** This diverse sector includes professional consulting, engineering, research and development, and life-science-related services that support the City's industrial and traded-sector base. Future growth is expected in smaller, flexible office or lab-flex spaces near industrial clusters or in mixed-use areas such as Town Center.
- **Local Services and Retail.** This sector includes retail, dining, healthcare, and personal service businesses that meet community needs, support local employment, and enhance Wilsonville's livability.

These industry strengths and opportunities position Wilsonville to support a balanced and diverse economy that includes both traded sector and local serving businesses.

What is the relationship between the Economic Opportunities Analysis (EOA) and the Economic Development Strategy (EDS)?

The EOA provides the technical foundation for understanding Wilsonville's employment land supply and long-term growth potential. The EDS, developed alongside this report, translates these findings into practical steps for implementation.

While the EOA identifies land capacity, site readiness, and target industries, the EDS outlines goals, policies, and actions to help the City act on those findings. The Strategy focuses on improving site readiness in Coffee Creek and Basalt Creek, addressing the commercial land deficit through redevelopment, and supporting small business and workforce development.

Together, the EOA and EDS provide a coordinated framework for guiding Wilsonville's economic growth. The EOA defines the opportunities; the EDS details how to achieve them. The EDS is presented as a separate companion document.

1. Introduction

The City of Wilsonville last completed an Economic Opportunities Analysis (EOA) in 2012. Since that time, the City and the broader region have experienced major economic shifts influenced by changes in the businesses located and growing in Wilsonville, evolving market conditions, the COVID-19 pandemic, and shifts in state and national policy priorities. These changes highlight the need for an updated EOA that reflects Wilsonville's current economic position and identifies opportunities and challenges for supporting employment growth over the next 20 years.

Wilsonville's economic future will be greatly affected by development of key employment areas, particularly Coffee Creek and Basalt Creek. These areas are part of the Portland region's southern industrial corridor, located along I-5 with access to major freight routes, regional labor markets, and nearby employment areas in Tualatin and Sherwood. Continued buildout of these areas is important to Wilsonville's long-term competitiveness but will require addressing challenges such as fragmented land ownership, existing contractor establishments, and limited urban infrastructure, particularly in parts of Basalt Creek.

Although the majority of Coffee Creek remains outside of City limits, it benefits from an established Urban Renewal District that supports infrastructure investment and helps prepare sites for development. Basalt Creek, which also remains outside City limits, has greater challenges related to fragmented ownership, existing contractor establishments, and limited urban infrastructure. Coordinated planning and investment will be necessary to improve site readiness in both areas and to position Wilsonville to capture future regional industrial growth.

Beyond industrial growth, Wilsonville's holistic economic health also depends on redevelopment within Town Center and within established commercial corridors. With limited vacant commercial land, future growth will rely on reinvestment and reuse of existing commercial properties, including large vacant buildings such as the former Albertsons, Rite Aid, Regal Cinemas, and Fry's Electronics sites.

Updating the EOA allows the City to reassess its employment land needs and realign economic development policies with emerging opportunities. The EOA projects employment growth from 2026 to 2046 and identifies the types and amounts of land needed to support that growth. It also outlines recommendations to strengthen Wilsonville's economic foundation. The EOA provides the foundation for updates to the Comprehensive Plan and the Wilsonville Economic Development Strategy (EDS), which was prepared concurrently and presented as a separate document. Together, these

efforts ensure that land use policies, infrastructure planning, and economic priorities remain aligned.

The EOA draws on data from the Oregon Employment Department, U.S. Bureau of Economic Analysis, U.S. Bureau of Labor Statistics, the U.S. Census Bureau and Costar[1] along with coordination from regional and local partners. Collectively, these sources provide a detailed understanding of Wilsonville's economic trends, industry composition, and land readiness, forming the foundation for a strategic, data-driven approach to the City's economic planning.

Framework for an Economic Opportunities Analysis

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

1. *Economic Opportunities Analysis (OAR 660-009-0015)*. The Economic Opportunities Analysis (EOA) requires communities to identify the major categories of industrial or other employment uses that could reasonably be expected to locate or expand in the planning area based on information about national, state, regional, county, or local trends; identify the number of sites by type that are reasonably expected to be needed to accommodate projected employment growth based on the site characteristics typical of expected uses; include an inventory of vacant and developed lands within the planning area designated for industrial or other employment use; and estimate the types and amounts of industrial and other employment uses likely to occur in the planning area. Local governments are also encouraged to assess community economic development potential through a visioning process or some other public input–based process in conjunction with state agencies.
2. *Industrial and commercial development policies (OAR 660-009-0020)*. Cities are required to develop commercial and industrial development policies based on the EOA. Local comprehensive plans must state the overall objectives for economic development in the planning area and identify categories or particular types of industrial and other employment uses desired by the community. Local comprehensive plans must also include policies that commit the City or county to designate an adequate number of employment sites of suitable sizes, types,

[1] Costar is a commercial real estate platform that tracks property listings, transactions, and market metrics nationwide.

and locations. The plan must also include policies to provide necessary public facilities and transportation facilities for the planning area.

3. *Designation of lands for industrial and commercial uses (OAR 660-009-0025).* Cities and counties must adopt measures to implement policies pursuant to OAR 660-009-0020. Appropriate implementation measures include amendments to plan and zone map designations, land use regulations, public facility plans, and transportation system plans. More specifically, plans must identify the approximate number, acreage, and characteristics of sites needed to accommodate industrial and other employment uses to implement plan policies and must designate serviceable land suitable to meet identified site needs.

Stakeholder Engagement Process

The development of the EOA was informed by a Technical Advisory Committee (TAC) comprised of City staff and regional economic development professionals. The TAC met three times during the project to review key findings, provide feedback, and help shape the direction of the analysis.

The first TAC meeting focused on foundational elements of the EOA, including the buildable lands inventory, employment forecast, and analysis of Wilsonville's competitive advantages and target industries. Feedback from this meeting informed refinements to the employment forecast and buildable lands inventory. The second and third TAC meetings focused on developing and refining economic development goals, policies, and actions that will guide the City's future efforts. These discussions helped ensure consistency between the EOA, the City's Comprehensive Plan, and the EDS, which was developed concurrently and is presented in a separate document.

In addition to TAC engagement, ECOnorthwest also interviewed five business and property owners between August and October 2025. These one-on-one interviews, focused on both the industrial and commercial sectors, provided insight into local challenges and opportunities. The feedback helped assess Wilsonville's competitive position and shape recommended economic actions.

The project also included two work sessions with the Planning Commission and two work sessions with the City Council at key milestones. These public meetings provided opportunities for decision-makers to review findings, discuss economic development objectives, and ensure the analysis and recommendations aligned with Wilsonville's broader community priorities.

Organization of This Report

This report is organized as follows:

- **Chapter 2. Economic Trends Shaping Wilsonville's Future** summarizes historic economic trends that affect current and future economic conditions in Wilsonville, as well as Wilsonville's competitive advantages for economic development.
- **Chapter 3. Employment Growth and Site Needs** presents a forecast for employment growth in Wilsonville and describes potential growth industries and site needs.
- **Chapter 4. Buildable Lands Inventory** presents a summary of the inventory of employment lands.
- **Chapter 5. Land Sufficiency and Conclusions** compares the supply of employment land with the future need for land and presents conclusions.

This report also includes two appendices:

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

2. Economic Trends Shaping Wilsonville's Future

Wilsonville is centrally located in the southern portion of the Portland region, which includes Clackamas, Multnomah, and Washington counties. This opportune location gives Wilsonville residents access to a broad job market, both within the Portland region and extending south to Salem. It also enables local employers to draw from a larger and more diverse workforce.

The City has a strong industrial employment base. Manufacturing, wholesale trade, and construction account for over 40% of local jobs. This large industrial presence sets Wilsonville apart from many other communities in the Portland region, underscoring its distinct role in the broader regional economy.

This chapter explains the main factors driving economic growth in Wilsonville. It places the City's economy in the context of national, state, and regional trends. It also reviews Wilsonville's employment base and real estate market. Finally, it highlights Wilsonville's strengths in supporting business growth and broader economic development, as well as the obstacles that may inhibit those same outcomes.

UNDERSTANDING ECONOMIC DEVELOPMENT

What is Economic Development? Economic development refers to efforts that strengthen a community's economy by attracting investment, creating jobs, and supporting business growth. In Oregon, cities often focus on stimulating real estate development and capital investment because property tax is their primary source of revenue to fund public services. With no sales tax in Oregon, and income taxes going to the State, cities like Wilsonville prioritize facilitating new property development that grows the local tax base. Wages and jobs are important too because local payroll taxes fund public transit (SMART).

Why Do Firms Choose Certain Locations? Businesses consider multiple factors when selecting a location, including availability of skilled labor, infrastructure availability (roads, utilities, etc.), proximity to customers and suppliers, and cost factors including land, wages, taxes and the regulatory climate. Entrepreneurial environments, industry clusters, and quality of life also play a role in attracting new businesses.

Public Policy's Role in Economic Development: Government policies—including zoning, incentives, and infrastructure investments—directly impact a City's ability to attract and retain businesses.

Summary of the Effect of National, State, and Regional Trends on Economic Development in Wilsonville

This section summarizes how national, state, and regional economic trends (detailed in Appendix A) are expected to influence economic growth in Wilsonville.

- **Slowing employment growth.** Oregon is expected to continue adding jobs, although the pace of growth is projected to slow compared to previous decades. Between 2007 and 2023, Wilsonville added 2,900 jobs, representing a 15% increase. This growth rate was similar to the 16% increase seen across the Portland region.[2] Wilsonville's population is relatively young and well-educated, creating a strong base for future workforce needs. This foundation supports both ongoing industry growth and the replacement of retiring workers. However, broader demographic trends, including an aging population and slower statewide labor force growth, may lead to a tighter labor market over time.
- **Remote work and office real estate market shifts.** Remote and hybrid work have reduced demand for traditional office space nationally and regionally, leading to higher office vacancy rates. In Wilsonville, where vacancies had historically been low, rates rose above 12% in 2024, likely due to lease expirations.[3] Despite this, rents have remained steady, indicating some resilience in the suburban office market. As companies adjust to long-term hybrid work, demand is shifting toward smaller, more flexible office spaces. Peak attendance for workers is expected to stabilize at 60-70% of pre-pandemic levels, with overall occupancy leveling off by late 2025.[4] Nationwide, investor interest in traditional office buildings remains weak. In Wilsonville, this may reduce demand for conventional office development and increase interest in adaptable or mixed-use formats, especially over the five-to-ten-year timeframe.
- **Retail realignment.** Retail real estate markets across the country continue to shift toward experiential uses and categories less affected by e-commerce, including food service, entertainment, and essential goods. While retail construction has slowed nationwide, strong consumer spending has helped stabilize vacancy rates and rents. Wilsonville reflects these national patterns, with little new retail development in recent years. Although vacancy rates have increased, they remained below 5% in 2024 (similar to regional

[2] See Exhibit 2 and Exhibit 4; Oregon Employment Department, Quarterly Census of Employment and Wages, 2007–2023.
[3] CoStar Office Market Trends, 2024
[4] Cushman & Wakefield, U.S. Office Marketbeat Q2 2024

averages).[5] Retail vacancy could be explained by large anomaly vacancies, such as the former Fry's on Town Center Loop West and former Albertson's near the intersection of Wilsonville Road and Boones Ferry Road. As consumer preferences evolve, Wilsonville's high quality of life and regional accessibility may attract retail that blends experience and convenience. Much of Wilsonville's potential to support retail growth may stem from opportunities for redevelopment in Town Center, not only because of limited vacant commercial land elsewhere, but also because Town Center may offer the kind of experiential, mixed-use environment that aligns with evolving consumer and retailer preferences.

- **Industrial market strengths and constraints.** National and state trends indicate continued growth in sectors such as advanced manufacturing, logistics, and food and beverage manufacturing and warehousing. Wilsonville's industrial sector remains a core economic strength, with low vacancy rates and rising rents. However, the City faces a significant constraint: limited availability of development-ready industrial land.[6] Only 1.7% of Wilsonville's industrial space has been built in the past 10 years, compared to roughly 13% across the broader Portland region.[7] These figures highlight a relative lack of new supply of industrial space. Wilsonville is well-positioned to benefit from emerging opportunities, including semiconductor-related investments, concentrated in Washington County, and broader reshoring trends. However, without tools and strategies that facilitate land sales and the installation of infrastructure, the City may struggle to accommodate this demand and fully capitalize on its competitive advantages.
- **Shifts in manufacturing trends.** Manufacturing employment in Oregon declined by 6% between early 2019 and 2023, even as employment in manufacturing increased by 1% nationally.[8] This reflects a broader shift in the state toward productivity gains and capital investment, rather than labor-driven expansion. While manufacturing remains a vital component of Oregon's economy, its potential to drive near-term job growth may be limited. Rising costs, particularly in housing and taxes, alongside recent policy changes may be diminishing Oregon's historic appeal to manufacturers. Additionally, the shortage of development-ready industrial

[5] CoStar Retail Market Trends, 2024
[6] Development-ready land is land that is vacant with public infrastructure (e.g., water, sanitary sewer, and roads) and private infrastructure (e.g., electricity, natural gas, and internet service) sufficient to support immediate (or near-term) construction.
[7] CoStar Industrial Market Trends, 2024
[8] Oregon Employment Department, Made in Oregon: A profile of the State's Manufacturing Sector, May 2024.

land is frequently cited as a major barrier to expansion or relocation, prompting some businesses to consider other states.[9]

While manufacturing growth across the state may be more limited, Wilsonville is well-positioned to support future growth in the sector. Its central location in the southwest Portland region, availability of industrial land (but much of this land is not development-ready), presence of established manufacturers, and access to a skilled workforce create a strong foundation for manufacturing business growth. However, unlocking this potential will require efforts to make industrial land development ready. As of 2023, manufacturing accounted for about 16% of Wilsonville's covered employment, with an average wage of $88,469, above the Citywide average of $78,235.[10]

- **Increases in automation.** Automation continues to reshape employment across sectors, reducing demand for routine tasks while increasing the need for higher-skilled roles. In manufacturing, processes like assembly and quality control are increasingly automated, while in the service sector, tools such as self-checkout and automated ordering systems are becoming more common. Emerging applications of artificial intelligence (AI) are also extending automation into cognitive and administrative functions once considered resistant to change.

  For Wilsonville, these shifts present both challenges and opportunities. Routine roles may decline, but demand will grow for technical, supervisory, and analytical positions that complement automation. Wilsonville's location, access to I-5, and proximity to tech-driven firms in the Portland region support the City's ability to attract and retain businesses adapting to automation. Its educated workforce and regional talent pipelines further position the City to compete for the types of industries and jobs likely to grow in an increasingly automated economy.

- **Aging population and replacement needs.** Oregon's aging population mirrors national trends, with growing demand for replacement workers as older employees retire. While Wilsonville has a younger median age (38.7) than the state overall (40.1), its senior population is increasing.[11]

  Clackamas County's population is expected to continue aging, with people 60 years and older increasing from 27% of the population in 2024 to 30% of

[9] Oregon Business & Industry. *The Condition of Oregon's Manufacturing Sector*. October 2024. https://oregonbusinessindustry.com/wp-content/uploads/The-Condition-of-Oregons-Manufacturing-Sector_October-2024.pdf.
[10] See Exhibit 7; Oregon Employment Department, Quarterly Census of Employment and Wages, 2023
[11] See Exhibit 43 and Exhibit 44; U.S. Census Bureau

the population in 2044, consistent with statewide trends.[12] As workers retire, businesses need to replace them with new workers. With a comparatively young workforce, Wilsonville could be in a good position to replace retiring workers if workforce skills match job openings.

- **Growth of entrepreneurship and small business.** The creation of new businesses is essential to the economies of both Oregon and Wilsonville, driving job growth and introducing innovations to the marketplace. High inflation, rising interest rates, and recession risks, along with tighter access to venture capital and banking lending conditions, have slowed new business formation. However, several favorable factors could mitigate these impacts going forward and support continued strength in entrepreneurship and small business formation in Oregon. These include increased personal savings and home equity levels, which are common funding sources for new businesses, along with the shift toward remote work opportunities and the large millennial generation entering their prime entrepreneurial years (late 30s and early 40s, according to Census Bureau research).[13] Wilsonville's access to a relatively young, well-educated workforce both within the City and from across the Portland region presents opportunities for small businesses to grow in the City.
- **Continued increase in demand for energy.** Rising fuel prices and state-level pushes toward electric vehicle adoption may alter commuting behavior and increase demand for EV infrastructure. As energy costs climb, proximity to job centers and transportation-efficient development will become increasingly important. Wilsonville's location near I-5 and regional employment centers is a long-term advantage.

  Demand for electricity by businesses like data centers and energy-consumptive automated manufacturing processes are increasing demand and competition for electricity across the state. The availability of electricity is a challenge for development of businesses with large energy needs. Development of new energy sources and transmission infrastructure will be key to development of some businesses, including in the Portland region and Wilsonville.
- **Trade exposure and tariff vulnerability.** Oregon's economy is highly dependent on exports, with more than half of the state's goods shipped to just three countries—Mexico, China, and Canada. As a result, the state is particularly vulnerable to shifts in national trade policy and global market

[12] See Exhibit 46; Portland State University, College of Urban & Public Affairs: Population Research Center, Population Forecast, 2024

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

disruptions. During the 2018–19 trade war, Oregon's GDP growth fell by 2.5 percentage points, underscoring the potential impacts of tariff escalations.[14] Wilsonville is home to manufacturing businesses, high-tech suppliers, and logistics firms. Future trade tensions could impact export-oriented businesses and reduce demand for industrial space.

- **Labor supply and immigration policy.** Stricter immigration policies initiated by the Trump Administration are expected to reduce labor availability in several key sectors that rely heavily on foreign-born workers, including construction, agriculture, food processing, and hospitality. Given Oregon's reliance on net in-migration for workforce growth, federal immigration restrictions may exacerbate hiring challenges, limit productivity, and increase wage inflation in affected sectors. In Wilsonville, these impacts are particularly relevant given its industrial employment base in construction (3,192 covered jobs as of 2023).[15] More broadly, a shortage of construction workers may slow project timelines, raise costs, and make it harder for development to pencil financially. This will be particularly relevant to the continued development of Coffee Creek and Basalt Creek, as well as redevelopment of Town Center.
- **Inflation**. For the last several decades, inflation rates have generally stayed below 3% in the United States. Inflation started to increase in 2021, reaching 9.1% in June 2022 year-over-year, the highest level in about 40 years. [16] In December 2024 the annual inflation rate was 2.9%, a marked reduction from the 2022 inflation rate.[17] Continued high rates of inflation may slow economic growth, further erode purchasing power, discourage savings, and lead to a national recession. Consumers may start decreasing spending on nonessentials, which could particularly influence retail development and investment decisions. Recent tariff policies and trade tensions may lead to new increases in inflation in 2025 and beyond.
- **Potential impacts of global climate change on Wilsonville's economy**. Climate change is manifesting in the Pacific Northwest through more frequent and severe weather events, alongside long-term climatic shifts. Increased average temperatures, heightened wildfire risks, and more extreme weather conditions such as heat waves and droughts are becoming more

[14] Oregon Economic Analysis, Oregon Economic and Revenue Forecast, March 2025. Vol. XLV, No. 1. Release date February 2025, https://www.oregon.gov/das/oea/Documents/OEA-Forecast-0325.pdf
[15] See Exhibit 7; Oregon Employment Department, Quarterly Census of Employment and Wages, 2023
[16] Bureau of Labor Statistics, U.S. Department of Labor, *The Economics Daily*, Consumer prices up 9.1% over the year ended June 2022, largest increase in 40 years at https://www.bls.gov/opub/ted/2022/consumer-prices-up-9-1-percent-over-the-year-ended-june-2022-largest-increase-in-40-years.htm (visited *July 25, 2022*).
[17] Bureau of Labor Statistics, U.S. Department of Labor, *The Economics Daily*, Consumer Price Index: 2023 in Review, https://www.bls.gov/opub/ted/2024/consumer-price-index-2023-in-review.htm

common. These changes are disrupting ecosystems, reducing snowpack and water availability, and affecting air quality due to increased wildfire smoke.

For Wilsonville, the effects of climate change could strain infrastructure, energy systems, and certain sectors of the local economy. Increased wildfire smoke and rising temperatures may impact worker health and reduce outdoor labor productivity. Reduced snowpack and water availability could affect reliability of industrial water supplies. The City's proximity to agricultural and forestry areas means disruptions in those sectors—due to drought, pests, or fire—could ripple through related industries such as manufacturing and logistics.

Employment Trends in Wilsonville and the Portland Region

The City of Wilsonville last updated its Economic Opportunities Analysis (EOA) in 2012. Since then, the local economy experienced significant changes, influenced by events such as the COVID-19 pandemic. This section examines how broader economic trends over the past decade have affected Wilsonville and the Portland region.

Employment Trends in Portland Region

Exhibit 2 shows covered employment in the Portland region (Clackamas, Multnomah, and Washington counties) for 2007 and 2023.[18] Over this period, covered employment increased by 132,382, a 16% gain. The largest increases were in healthcare and social assistance (up 37,194 jobs) and professional and business services (up 24,516 jobs). In 2023, the average annual wage across the region was $76,066.[19]

Exhibit 2. Covered Employment by Industry, Portland Region, 2007–2023

Sector	Employees		Change in Employment 2007-2023	
	2007	2023	Number	AAGR*
Agriculture, Forestry, Fishing, Hunting & Mining	10,434	9,396	(1,038)	(0.7%)
Construction	48,646	59,114	10,468	1.2%
Manufacturing	102,778	101,508	(1,270)	(0.1%)
Wholesale Trade	50,097	46,013	(4,084)	(0.5%)
Retail Trade	87,545	90,202	2,657	0.2%
Transportation & Warehousing & Utilities	31,609	45,318	13,709	2.3%
Information	21,156	21,149	(7)	(0.0%)
Finance & Insurance	37,606	29,212	(8,394)	(1.6%)
Real Estate and Rental and Leasing	15,078	16,863	1,785	0.7%
Professional, Scientific, & Technical Services	43,880	68,396	24,516	2.8%
Management of Companies and Enterprises	21,623	37,487	15,864	3.5%
Admin, Support, Waste Management, & Remediation	51,221	55,221	4,000	0.5%
Private Education	15,201	19,126	3,925	1.4%
Health Care & Social Assistance	83,749	120,943	37,194	2.3%
Arts, Entertainment, & Recreation	11,152	14,884	3,732	1.8%
Accommodation & Food Services	68,206	81,081	12,875	1.1%
Other Services & Public Administration	31,743	36,347	4,604	0.9%
Government	100,832	112,678	11,846	0.7%
Total	**832,556**	**964,938**	**132,382**	**0.9%**

Source: Oregon Employment Department, Quarterly Census of Employment and Wages, 2007–2023.
*AAGR = Average Annual Growth Rate

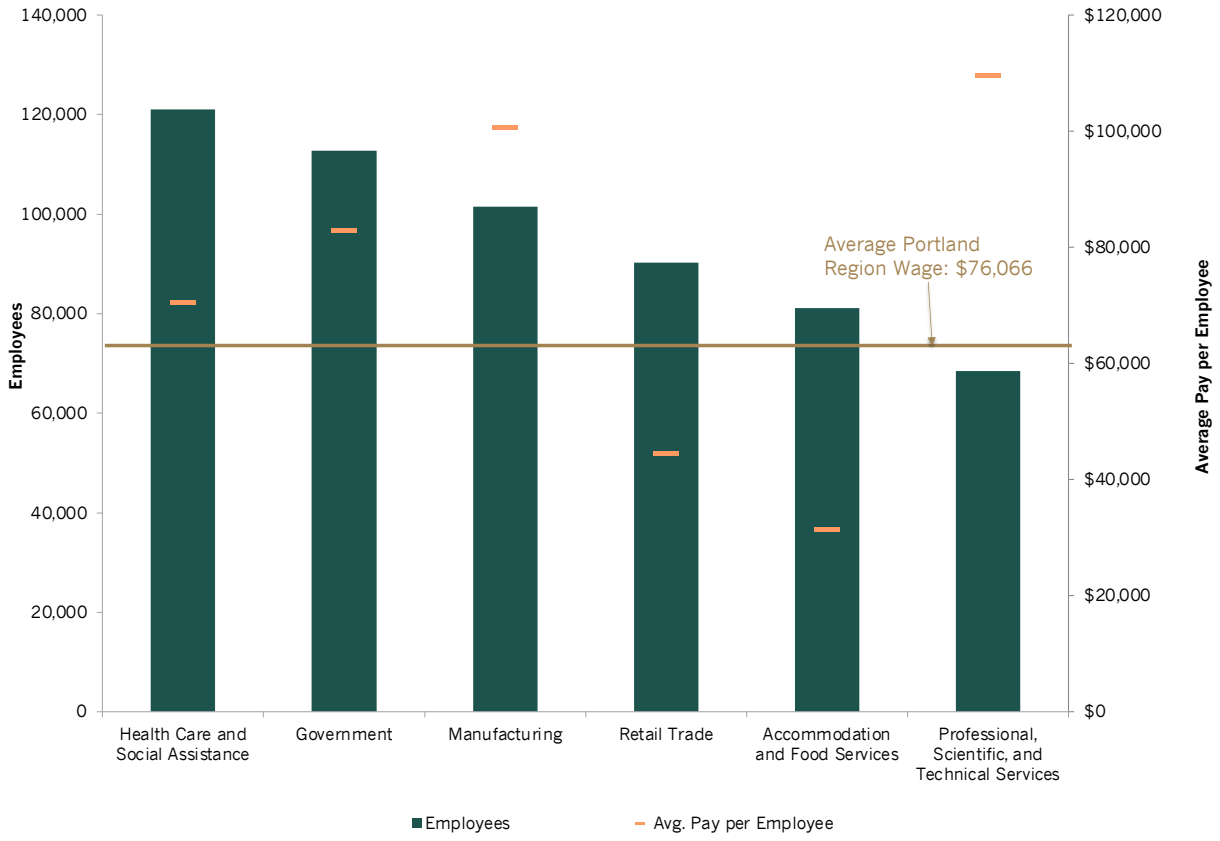
[18] **Covered** employment includes employees covered by unemployment insurance. Examples of workers not included in covered employment are sole proprietors, some types of contractors (often referred to as "1099 employees"), or some railroad workers. Covered employment data is from the Oregon Employment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

[19] Bureau of Labor Statistics, Quarterly Census of Employment and Wages, 2023.

Exhibit 3 shows covered employment and average wage for the six largest sectors in the Portland region. Together these six sectors made up 60% of covered employment.

Among these six largest sectors, professional services, manufacturing, and government paid above-average wages. Other sectors such as construction, wholesale trade, management of companies and enterprises, finance and insurance, and information also had higher-than-average wages but made up a smaller share of covered employment.

Exhibit 3. Covered Employment and Average Pay by Sector, 6 Largest Sectors Portland Region, 2023



Source: Oregon Employment Department, Quarterly Census of Employment and Wages, 2023.

Employment in Wilsonville

Between 2007 and 2023, covered employment in Wilsonville increased by 2,901 positions, representing a 15% total increase at an average annual growth rate of 0.9%, shown in **Exhibit 3.** This growth is similar to the Portland region's 16% growth and 0.9% annual rate.

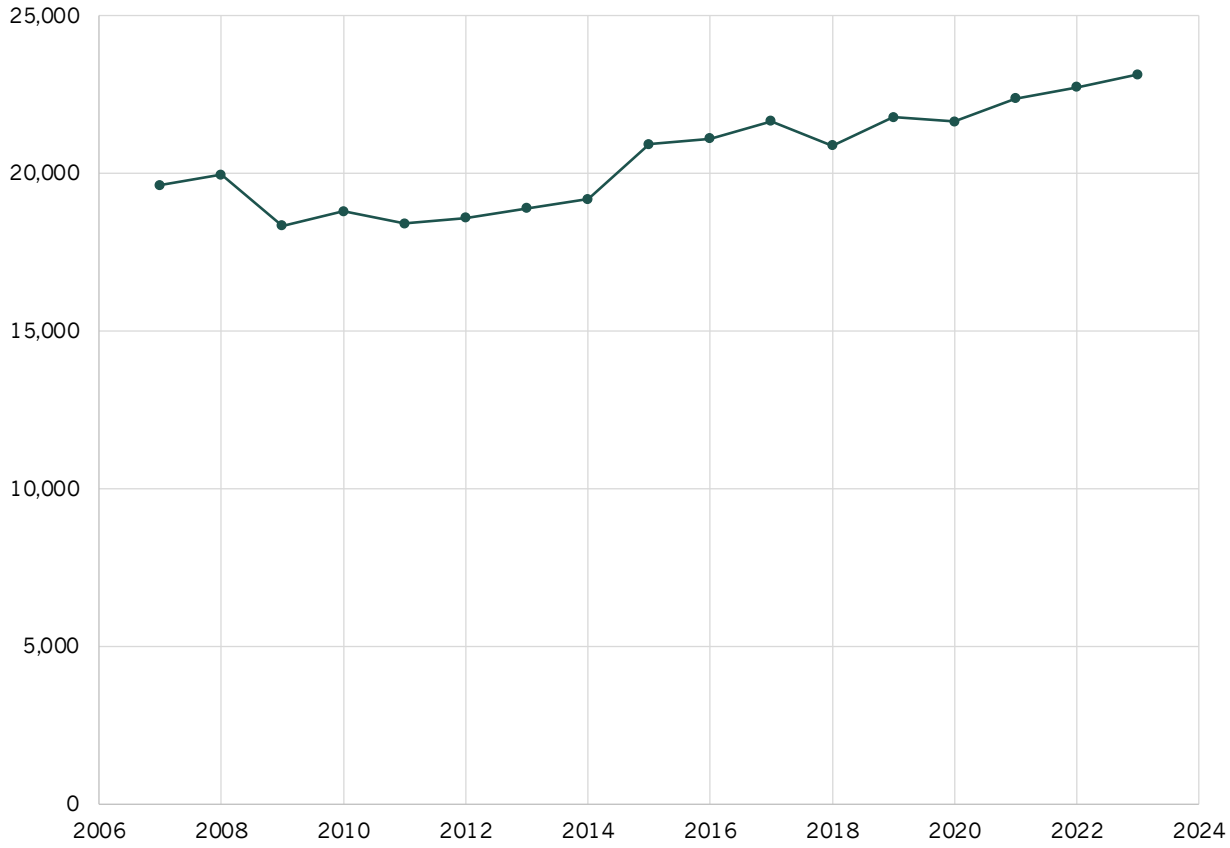
Exhibit 4. Change in Covered Employment, Wilsonville, 2007–2023

Sector	Employees		Change in Employment 2007-2023	
	2007	2023	Number	AAGR*
Agriculture, Forestry, Fishing, and Hunting	19	17	(2)	(0.7%)
Construction	1,008	3,010	2,002	7.1%
Manufacturing	4,225	3,719	(506)	(0.8%)
Wholesale Trade	2,424	3,318	894	2.0%
Retail Trade	1,663	2,125	462	1.5%
Transportation, Warehousing, and Utilities	1,501	864	(637)	(3.4%)
Information	130	78	(52)	(3.1%)
Finance and Insurance	297	172	(125)	(3.4%)
Real Estate and Rental and Leasing	304	233	(71)	(1.6%)
Professional, Scientific, and Technical Services	1,686	2,330	644	2.0%
Management of Companies and Enterprises	1,170	474	(696)	(5.5%)
Administrative, Support, Waste Management and Remediation	1,468	2,023	555	2.0%
Private Education	158	102	(56)	(2.7%)
Health Care and Social Assistance	1,029	989	(40)	(0.2%)
Arts, Entertainment, and Recreation	200	188	(12)	(0.4%)
Accommodation and Food Services	1,087	1,352	265	1.4%
Other Services and Public Administration	381	483	102	1.5%
Government	1,127	1,301	174	0.9%
Total	**19,877**	**22,778**	**2,901**	**0.9%**

Sectors highlighted in blue have wages higher than the City average.
*Average Annual Growth Rate
Source: Oregon Employment Department, Quarterly Census of Employment and Wages, 2007 and 2023.

Wilsonville's net covered employment growth between 2007 and 2023 generally reflects steady annual changes, with most years showing gains or losses between 1% and 4%. One notable exception was in 2009, when covered employment declined by 8% as a result of the Great Recession that impacted the entire nation. The strongest year for growth was 2015, when Wilsonville added 1,744 covered positions (9% increase). Much of that growth was due to the relocation of Stream Global Services to Wilsonville.[20]

Exhibit 5. Change in Covered Employment, Wilsonville, 2007 – 2023



Source: Oregon Employment Department, Quarterly Census of Employment and Wages, 2007 to 2023.

[20] Michael Bamesberger, "Stream Global Services to Relocate from Beaverton to Wilsonville," *The Oregonian/OregonLive*, March 26, 2013, https://www.oregonlive.com/wilsonville/2013/03/stream_global_services_to_relo.html.

Since 2007, Wilsonville's employment has grown at a pace similar to the broader Portland region. **Exhibit 6** shows that the composition of that growth, however, differs by industry. Construction jobs in Wilsonville more than tripled over this period, far outpacing the region's growth in the same sector. The City also saw notable gains in professional services, administrative services, and wholesale trade. Notably, while wholesale trade employment rose in Wilsonville, it declined across the broader Portland region. At the same time, several sectors that expanded across the Portland region, such as management of companies, transportation and warehousing, health care and social assistance, and real estate experienced declines within Wilsonville.

Exhibit 6. Change in Covered Employment, Wilsonville compared to the Portland Region, 2007 – 2023*

Source: Oregon Employment Department, Quarterly Census of Employment and Wages, 2007 to 2023.
*Exhibit only shows industries with greater than 200 employees in Wilsonville

Exhibit 7 summarizes covered employment in Wilsonville in 2023. The largest employment sectors were manufacturing (16% of employees), wholesale trade (15%), construction (13%), professional and technical services (10%), retail trade (9%), and administrative and support services (9%). The average annual wage across all employees was $78,235, slightly higher than the regional average.

Exhibit 7. Covered Employment and Average Pay by Sector, Wilsonville, 2023[21]

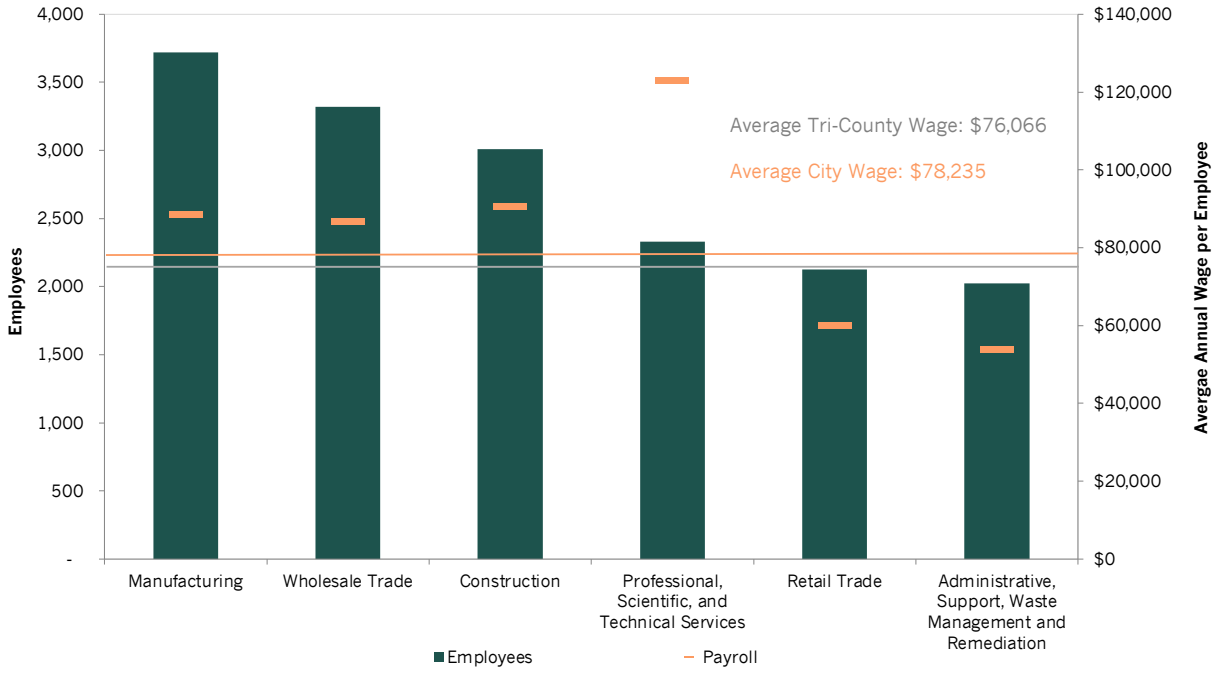
Sector	Employees	Payroll	Average Pay per Employee
Agriculture, Forestry, Fishing, and Hunting	17	$638,130	$37,537
Construction	3,010	$272,634,357	$90,576
Manufacturing	3,719	$329,017,787	$88,469
Wholesale Trade	3,318	$287,443,786	$86,632
Retail Trade	2,125	$127,210,907	$59,864
Transportation, Warehousing, and Utilities	864	$58,684,874	$67,922
Information	78	$9,193,644	$117,867
Finance and Insurance	172	$12,687,158	$73,763
Real Estate and Rental and Leasing	233	$16,287,329	$69,903
Professional, Scientific, and Technical Services	2,330	$286,426,416	$122,930
Management of Companies and Enterprises	474	$46,709,942	$98,544
Administrative, Support, Waste Management and Remediation	2,023	$108,715,935	$53,740
Private Education	102	$3,284,611	$32,202
Health Care and Social Assistance	989	$47,878,787	$48,411
Arts, Entertainment, and Recreation	188	$4,139,588	$22,019
Accommodation and Food Services	1,352	$39,210,617	$29,002
Other Services and Public Administration	483	$28,903,857	$59,842
Government	1,301	$102,958,420	$78,964
Total	**22,778**	**$1,782,026,145**	**$78,235**

Source: Oregon Employment Department, Quarterly Census of Employment and Wages, 2023.

[21] The following sectors were combined due to confidentiality of QCEW data: transportation and warehousing and utilities; other services and public administration

Exhibit 8 shows covered employment and average pay per employee for the six largest sectors in Wilsonville. These six sectors account for 73% of covered employment. Of these sectors, manufacturing, wholesale trade, construction, and professional services had above-average wages, with wages for professional services considerably above the wages of other sectors. Retail trade and administrative and support services had below average wages.

Exhibit 8. Covered Employment and Average Pay for Six Largest Sectors, Wilsonville, 2023



Source: Oregon Employment Department, Quarterly Census of Employment and Wages, 2023.

Outlook for Growth in the Portland Region

Exhibit 9 shows the Oregon Employment Department's forecast for employment growth by industry in the Portland region (Multnomah, Clackamas, and Washington Counties). Between 2023 and 2033, employment in the region is expected to grow at an average annual growth rate of 0.9%.

The sectors projected to add the most jobs are professional and business services (17,500 jobs), health care and social assistance (17,400 jobs), accommodation and food services (9,600 jobs), and construction (8,300 jobs). These four sectors are expected to add a total of 52,800 jobs, or about 56% of the region's employment growth. **Wilsonville accounts for about 3% of the Portland region's employment.**

Exhibit 9. Regional Employment Projections, 2023–2033, Portland Region (Multnomah, Clackamas, Washington Counties)

Industry Sector	2023	2033	Change 2023-2033		
			Number	Percent	AAGR
Total Private Payroll Employment	**886,600**	**970,700**	**84,100**	**9%**	**0.9%**
Natural resources and mining	9,700	10,000	300	3%	0.3%
Construction	60,300	68,600	8,300	14%	1.3%
Manufacturing	101,500	108,800	7,300	7%	0.7%
Wholesale trade	48,200	51,600	3,400	7%	0.7%
Retail trade	90,200	92,300	2,100	2%	0.2%
Transportation, warehousing, and utilities	46,100	51,700	5,600	12%	1.2%
Information	21,900	25,100	3,200	15%	1.4%
Financial activities	59,200	60,600	1,400	2%	0.2%
Professional and business services	166,600	184,100	17,500	11%	1.0%
Private educational services	21,300	24,000	2,700	13%	1.2%
Health care and social assistance	128,100	145,500	17,400	14%	1.3%
Arts, entertainment, and recreation	14,700	17,000	2,300	16%	1.5%
Accomodation and food services	81,200	90,800	9,600	12%	1.1%
Other services	37,500	40,700	3,200	9%	0.8%
Government	**119,200**	**124,700**	**5,500**	**5%**	**0.5%**
Self-employment	**65,200**	**70,200**	**5,000**	**8%**	**0.7%**
Total Employment	**1,070,900**	**1,165,700**	**94,800**	**9%**	**0.85%**

Note: AAGR is the Annual Average Growth Rate

Source: Oregon Employment Department. Employment Projections by Industry 2023-2033.

Real Estate Market Trends in Wilsonville and the Broader Portland Region

The real estate market trends in Wilsonville largely reflect broader regional and national trends (outlined in Appendix A), though local conditions, especially land availability, play a significant role in shaping development outcomes. The following trends are based on data from CoStar, a commercial real estate platform that tracks property listings, transactions, and market metrics nationwide. While CoStar offers valuable, up-to-date insights, its coverage is more limited in smaller markets and at the individual property level. It does not capture the entire market and should be viewed as a general indicator of market conditions rather than a complete inventory.

This section provides a summary of market conditions in Wilsonville, which is described in detail in the subsequent sections.

Office: Office demand in Wilsonville is expected to remain limited in the near term. High vacancy rates, ongoing negative absorption[22], and weak investor interest continue to affect both Wilsonville and the broader market. Although Wilsonville's office rents have recovered since 2020, they still lag behind those in the I-5 South submarket (see **Exhibit 10**) and the Portland region (see **Exhibit 11)**, despite briefly matching regional rates in 2024. Over the longer term, demand may grow as the market adjusts to hybrid work and as business formation and headcount increase. However, limited vacant land for commercial use (as shown in Chapter 4. Buildable Lands Inventory) could constrain new office development.

Retail: Demand for existing retail space remains steady in both the broader Portland region and Wilsonville. Relatively low vacancy rates and stable, modest rent growth suggest that Wilsonville could see new retail development in the coming years. However, while consumer demand holds, rising interest rates and higher operating costs have made retailers more cautious about expanding. Combined with Wilsonville's limited supply of vacant commercial land, retail growth is likely to remain modest near-term. Wilsonville has opportunities for retail development in areas like Town Center and other vacant large commercial buildings within the City.

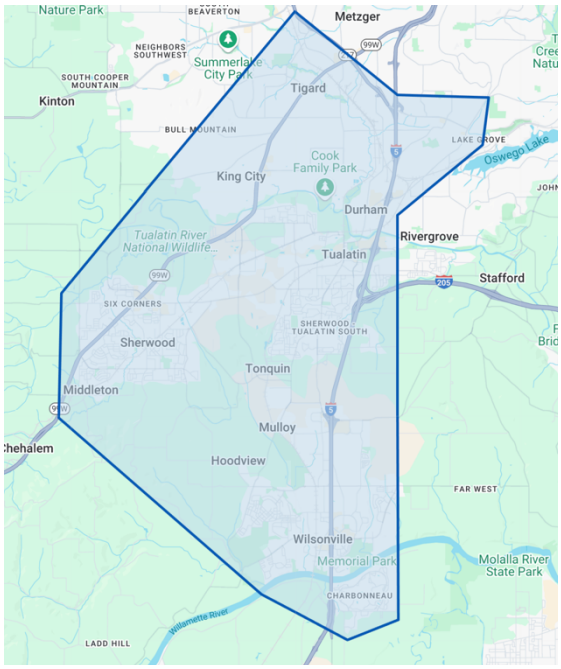
Industrial: Wilsonville's industrial market is strong but faces significant limitations to future growth. The City has very low industrial vacancy rates and higher-than-average rents, showing steady demand. However, very little new space has been built in the past decade, largely due to a shortage of *development-ready* industrial land and large sites. While regional interest in industrial space remains high—particularly in sectors like manufacturing and warehousing—most new development in the I-5 South

[22] Absorption occurs when vacant space is leased up and/or businesses take over existing leases. Negative net absorption means that more space was vacated than leased over a given period.

submarket has occurred in neighboring cities like Sherwood and Tualatin. Without more development-ready land, Wilsonville is likely to continue seeing new industrial investment occur where there are viable development sites.

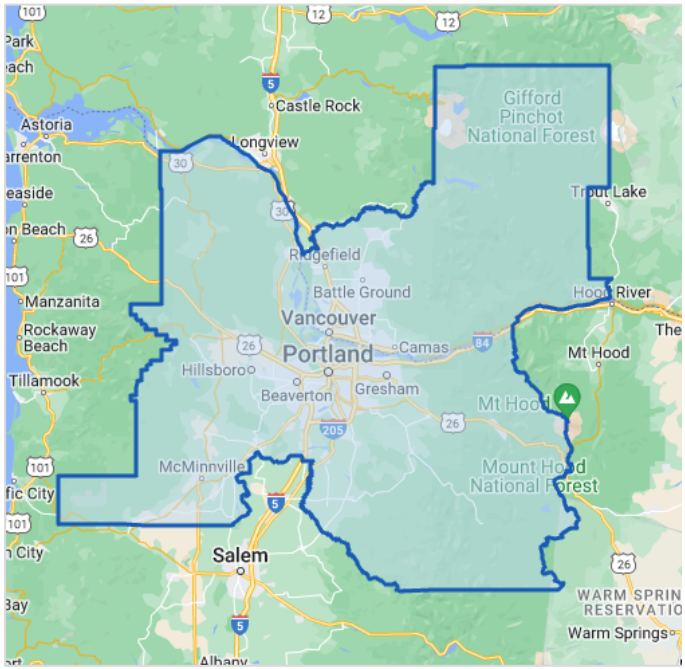
The remainder of this section provides detailed analysis of real estate trends in Wilsonville, the I-5 South submarket (**Exhibit 10)** and the broader Portland region (**Exhibit 11).**

Exhibit 10: I-5 South Submarket Boundary



Source: CoStar

Exhibit 11: Broader Portland Region CoStar Boundary



Source: CoStar

Commercial Market Trends

Broader Portland Regional Trends[23]

Similar to national trends presented in Appendix A, office spaces in the broader Portland region are experiencing high vacancy rates and lower leasing activity. Work-from-home policies and corporate downsizing have decreased the demand for office space, leading many companies to reassess the long-term space needs. Despite a small uptick in net absorption in Q4, the overall 2024 market posted another year of negative demand. With a limited construction pipeline and companies continuing to shrink footprints, vacancy rates are expected to increase, and growth in rent is projected to remain flat into 2025.

- **Vacancy rates:** Direct vacancy climbed to a record high of 13.5% in Q4 2024, continuing a steady upward trend over the past eight quarters.
- **Absorption:** While Q4 posted positive net absorption of 282,000 square feet, total net absorption for 2024 was negative 964,000 square feet, marking the fifth consecutive year of annual negative absorption in Portland's office market.
- **Leasing activity:** Q4 2024 leasing activity fell to a low of 524,000 square feet, nearly 50% lower year-over-year. Annual leasing volume totaled 3.4 million square feet, an 8.6% decline from 2023.

While the overall market remains soft, performance varies across submarkets. Portland's Central Business District continues to struggle, with a direct vacancy rate of 24%. In contrast, suburban markets are generally outperforming the core, with notably lower vacancy rates, ranging from **3% to 17%.** These patterns reflect a broader tenant shift toward decentralized, cost-effective, and flexible office space options outside the downtown core.

[23] Portland Metro Regional trends based on Kidder Matthews, Portland Office Market Report Q4 2024

Wilsonville Office Market

Wilsonville currently has roughly 1.4 million square feet of office space, representing roughly 15% of office space in the I-5 South submarket and 1% in the broader Portland region. According to CoStar, over the past decade, one office building was added to Wilsonville's market in 2020, Eye Health Northwest, located at 29250 Southwest Town Center Loop West. This office building was about 30,000 square feet or roughly 2% of Wilsonville's total office space. Over the same time period, the broader Portland region added a greater share (9%) of space to its office market.

Exhibit 12:Office Space Development Trends, 2015 to 2024

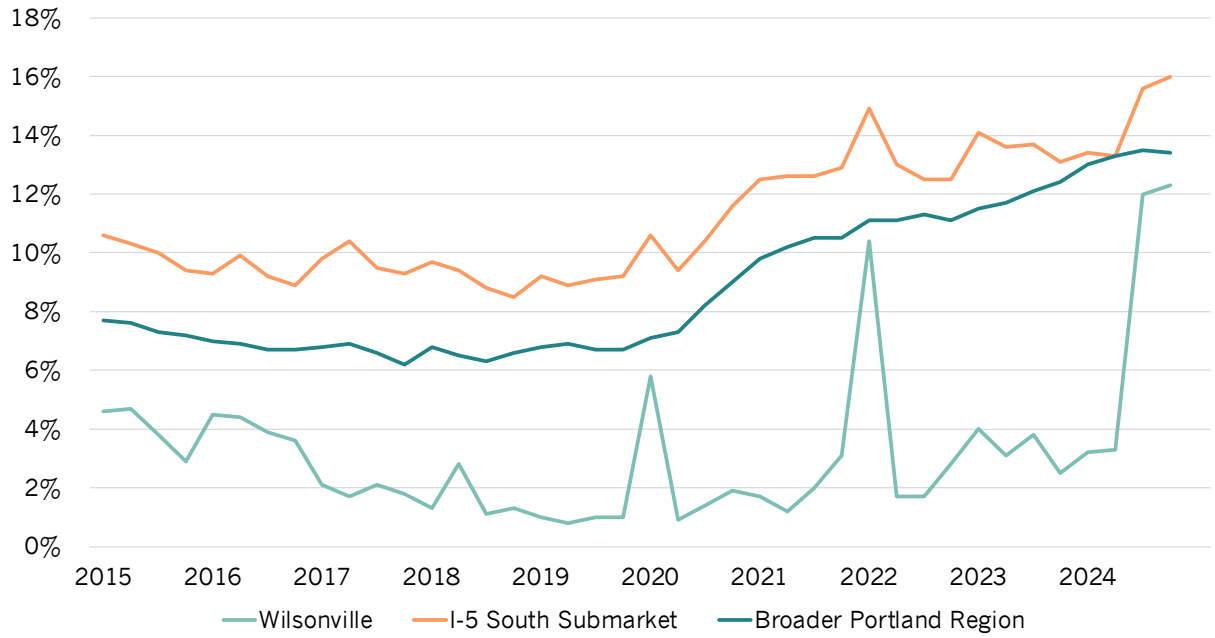
GEOGRAPHY	TOTAL BUILDINGS	TOTAL SQUARE FEET	AVERAGE BUILDING SIZE
ALL OFFICE DEVELOPMENT			
Broader Portland Region	6,268	120,279,588	19,199
I-5 South Submarket	484	8,975,567	18,545
Wilsonville	63	1,369,151	21,733
BUILT IN THE LAST 10 YEARS*			
Broader Portland Region	159	10,765,783	67,710
I-5 South Submarket	8	74,590	9,320
Wilsonville	1	30,000	30,000

Source: CoStar, pulled February 2025

*Does not account for removal of office space from the market

Per CoStar, the I-5 South submarket office vacancy rates have been higher than the broader Portland region's vacancy rates since 2015. Both had vacancy rates above 13% at the end of 2024. While Wilsonville office vacancy rates have generally remained much lower, the end of a few leases are reflected in vacancy rate spikes in 2020, 2022, and 2024, when the vacancy rate spiked closer to the broader Portland regional average.

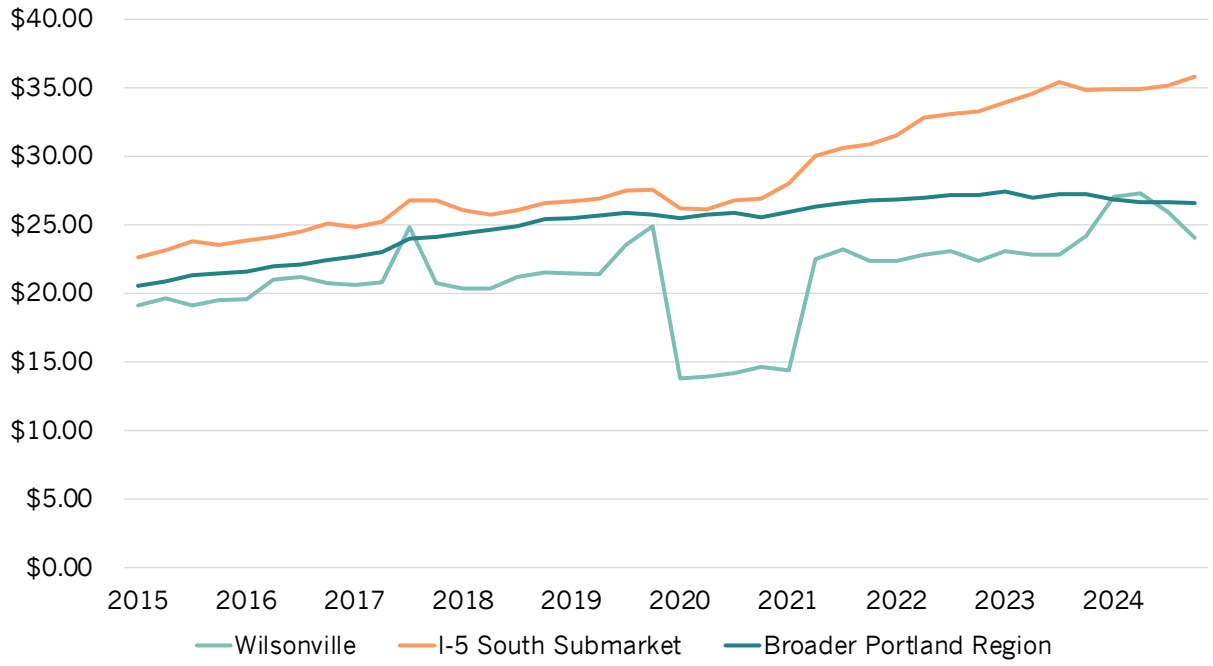
Exhibit 13: Office Vacancy Rate Trends, 2015-2024



Source: CoStar, pulled February 2025

Office rents have increased in the I-5 South submarket despite high vacancies and have been substantially above the broader Portland region's average since 2021, according to CoStar. Historically, office rents in Wilsonville have been lower than in the broader Portland region. Wilsonville's rents have recovered from the pandemic-related drop in 2020 and rents have been on par with the broader Portland region's rents at various points throughout 2024.

Exhibit 14: Office Lease Rate Trends, 2015-2024



Source: CoStar, accessed February 2025

Net absorption and delivery trends also indicate a relatively slow office market. From 2020 to 2024, net absorption was negative in all three areas: negative 4.5 million square feet in the broader Portland region, negative 555,000 square feet in the I-5 South submarket, and negative 124,000 square feet in Wilsonville.

This analysis suggests that **near-term demand for traditional office space in Wilsonville will remain limited.** High vacancy rates, ongoing negative absorption, and weak investor interest continue to affect both Wilsonville and the broader market. Although Wilsonville's office rents have recovered since 2020, they still lag behind those in the I-5 South submarket and the Portland region, despite briefly matching regional rates in 2024. Over the longer term, demand may grow as the market adjusts to hybrid work and as business formation and headcount increase. However, while there is redevelopment potential in Town Center, there is limited vacant land for commercial use (as shown in Chapter 4. Buildable Lands Inventory). Those spaces

currently vacant may fill in time but limited commercial land supply could constrain new office development in Wilsonville in the long term.

Broader Portland Regional Retail Trends[24]

Similar to national trends, development of new retail space in the broader Portland region remains limited. While consumer demand remains relatively stable, economic pressures including rising interest rates, higher operating costs, and concerns about tariffs, have led retailers to adopt more cautious expansion strategies. Vacancy rates have edged up, and leasing activity has slowed, which will place more pressure on landlords moving forward to stay competitive with lease terms, pricing and concessions. Despite these challenges, market rents continued to grow modestly, rising 3.5% year-over-year.

- **Rising vacancy rates:** The retail vacancy rate rose slightly to 3.9% in Q4 2024, up from 3.5% a year earlier.
- **Negative net absorption:** The Portland market had negative net absorption of 437,757 square feet in 2024, a reversal from the positive net absorption of 188,607 square feet in 2023.
- **Slower construction activity:** The under-construction pipeline shrank by nearly 30% year-over-year from Q4 2024.

[24] Broader Portland regional trends based on Kidder Matthews, Portland Retail Market Report Q4 2024

Wilsonville Retail Market

Wilsonville currently has 2.2 million square feet of retail space, representing 32% of all retail space in the I-5 South submarket and 2% of retail space in the broader Portland region. On average, Wilsonville's retail developments are larger with an average of 19,330 square feet, compared to 14,220 square feet in the I-5 South submarket and 10,450 square feet in the broader Portland region.

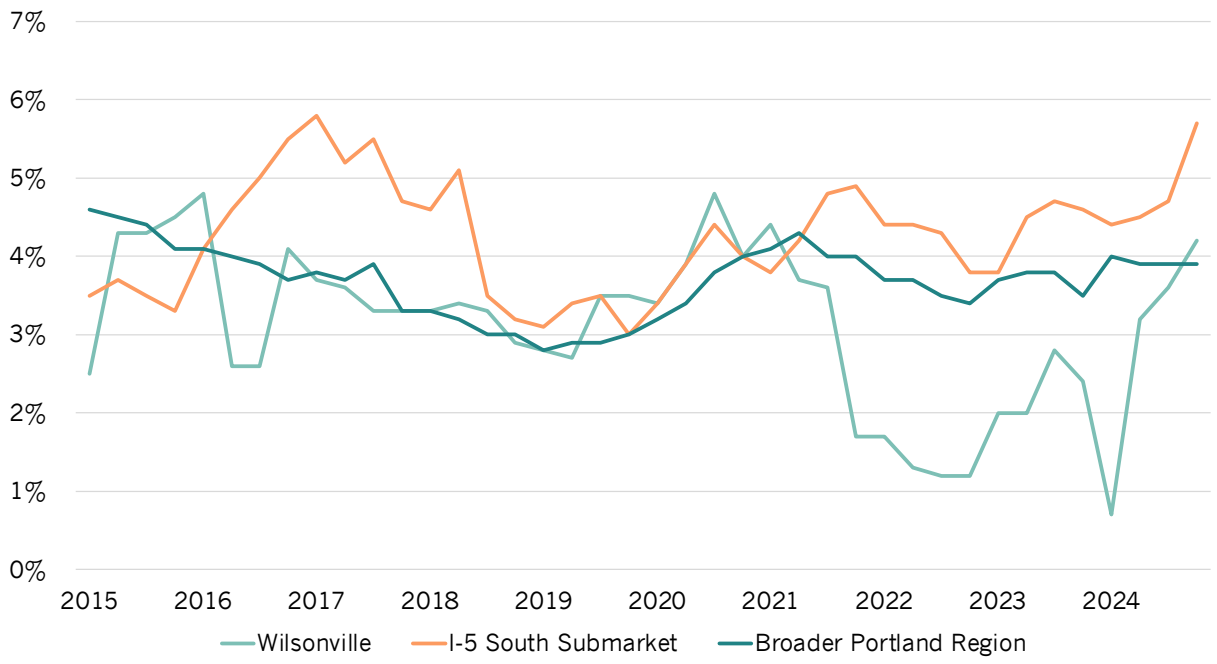
Exhibit 15: Retail Space Development Trends, 2015 - 2024

GEOGRAPHY	TOTAL BUILDINGS	TOTAL SQUARE FEET	AVERAGE BUILDING SIZE
ALL RETAIL DEVELOPMENT			
Broader Portland Region	12,132	126,767,807	10,450
I-5 South Submarket	478	6,797,343	14,220
Wilsonville	112	2,165,439	19,330
BUILT IN THE LAST 10 YEARS*			
Broader Portland Region	441	5,186,720	11,760
I-5 South Submarket	23	229,939	10,000
Wilsonville	2	91,495	45,750

Source: CoStar, pulled February 2025 *Does not account for removal of retail space from the market

According to CoStar, Wilsonville's retail vacancy rates have been lower than the I-5 South Submarket and the broader Portland region since 2021. However, over the course of 2024, Wilsonville's vacancy rate has risen, reaching 4.2% by the end of 2024 similar to the broader Portland region's retail vacancy rate.

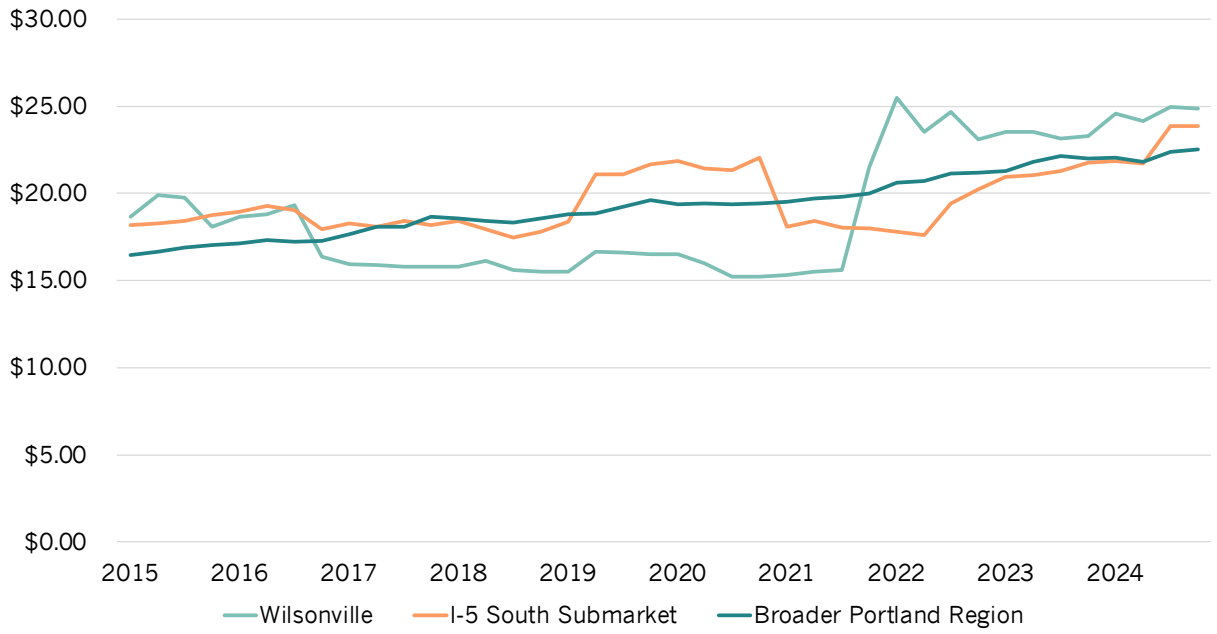
Exhibit 16: Retail Vacancy Rate Trends, 2015 - 2024



Source: CoStar, pulled February 2025

Retail rents are steadily increasing across the region, including within the submarket, and Wilsonville specifically. Wilsonville's rents surpassed and have remained slightly higher than the other markets since 2022. The low vacancy rate during this time period likely contributed to the growing lease rates. Wilsonville's rents were about $24.90 by the end of 2024.

Exhibit 17: Retail Lease Rate Trends, 2015 - 2024



Source: CoStar, pulled February 2025

Despite low vacancies and rising rents in Wilsonville, there has been limited new retail development in Wilsonville in the past 10 years, and net absorption of vacant retail space has been negative for the past two years.

The relatively low vacancy rates and stable, modest rent growth suggest that Wilsonville could see new retail development in the coming years. However, while consumer demand holds, rising interest rates and higher operating costs will make retailers more cautious about expanding. While there is limited vacant land for retail development, infill and redevelopment in Town Center provide an opportunity for the new, modest square footage of retail development the market is demanding.

Wilsonville's Comprehensive Plan policy has for decades focused major retail development in commercial centers near the I-5 interchanges rather than in mixed-use centers and corridors. This focus reinforces the expectation of a very limited supply of land for retail growth. Besides the existing commercial centers, only small-scale neighborhood retail is planned within the City's Urban Growth Boundary and adjacent Urban Reserves. Retail growth is designed to occur through redevelopment of existing

commercial uses or underutilized parking areas, thus continuing to mostly limit retail to its current footprint in the City. The highest opportunity for new retail, particularly experience-based smaller-scale retail and food and beverage establishments, is anticipated through redevelopment in Town Center. This would appear to support broader trends in retail where a number of larger-format national retailers are reducing footprints or being cautious about expansion, while support for more local experience-based retail and food and beverage establishments is increasing.

Industrial Market

Broader Portland Regional Trends

Like the national industrial market overall, the broader Portland region industrial market has been strong in recent years, particularly from 2021 to 2023. However, similar to national trends, a few metrics indicate that demand for industrial space is decelerating in the region:

- **Increasing vacancy rates:** Vacancy for industrial space in the broader Portland region has risen steadily since early 2023, and net absorption was negative in 2023 and 2024. While overall leasing activity for industrial space in the area remained higher than the area's 10-year average, 2024 saw the lowest year-end leasing since 2018. A few large companies downsizing or exiting the market contributed to negative net absorption and vacancy trends.[25]
- **Slow lease-up for new construction:** In 2024, 1.9 million square feet of new industrial space was added to the market, increasing the region's vacant supply. As of year-end, 73% of that new space remained unleased, indicating slower-than-expected tenant demand. [26]
- **Rising unemployment rates:** In 2024, Portland's unemployment rate increased to 4.1% matching and surpassing the national unemployment rate at various points through the year. Layoffs, including the shutdown of a large UPS location in North Portland, which impacted 300 sorting and distribution jobs are impacting the local unemployment rates.[27]

However, investors and leasing professionals are confident in the regional market's long-term health, particularly due to significant investments in the region's semiconductor manufacturing sector.[28] Market strengths include:

[25] CBRE, Q4 2024 Portland Industrial Market Update
[26] CBRE, Q4 2024 Portland Industrial Market Update
[27] CBRE, Q4 2024 Portland Industrial Market Update
[28] Cushman & Wakefield, Industrial Marketbeat Q2 2024 Portland Industrial Report

- **CHIPS Act:** In 2023, the federal government allocated $50 billion as a part of the CHIPS Act to bolster U.S. semiconductor manufacturing, which is expected to create thousands of regional manufacturing and construction jobs.[29] The expansion of the semiconductor industry could also have a ripple effect, creating demand for industrial space for equipment suppliers, supply chain materials manufacturers, and testing facilities.
- **Strong submarkets:** According to market reports from Cushman & Wakefield and CBRE, other strong industrial submarkets include food and beverage warehousing, tech warehousing, and auto part manufacturing.[30] These are some of the most common types of tenants seeking space in the market, although deals are taking longer on average to reach completion.[31] As reported by CBRE, investors and leasing professionals are confident that the Portland market has additional room for growth.

[29] Cushman & Wakefield, Industrial Marketbeat Q2 2024 Portland Industrial Report
[30] Cushman & Wakefield, Industrial Marketbeat Q2 2024 Portland Industrial Report
[31] CBRE, Q2 2024 Portland Industrial Market Update

Wilsonville Industrial Market

Wilsonville has about 8.6 million square feet of industrial and flex space, representing roughly 38% of the I-5 South submarket and 3% of the broader Portland region's industrial space. The average size of Wilsonville's industrial building is roughly 63,000 square feet, almost twice as large as the average industrial building in the broader Portland region (34,000 square feet).

Wilsonville has had limited industrial development in the past decade. Only 1.7% percent of Wilsonville's total industrial space was built in the last 10 years, compared to roughly 9% of the I-5 South submarket industrial space and 13% of the broader Portland region's industrial space. This slow pace of development makes sense given the limited supply of development-ready industrial land in the City.

Exhibit 18: Industrial & Flex Space Development Trends, 2015 to 2024

GEOGRAPHY	TOTAL BUILDINGS	TOTAL SQUARE FEET	AVERAGE BUILDING SIZE
ALL INDUSTRIAL DEVELOPMENT			
Broader Portland Region	7,581	259,657,430	34,250
I-5 South Submarket	671	22,831,304	34,030
Wilsonville	136	8,592,887	63,180
BUILT IN THE LAST 10 YEARS*			
Broader Portland Region	403	33,736,304	83,710
I-5 South Submarket	40	2,096,708	52,420
Wilsonville	2[32]	145,611	72,810

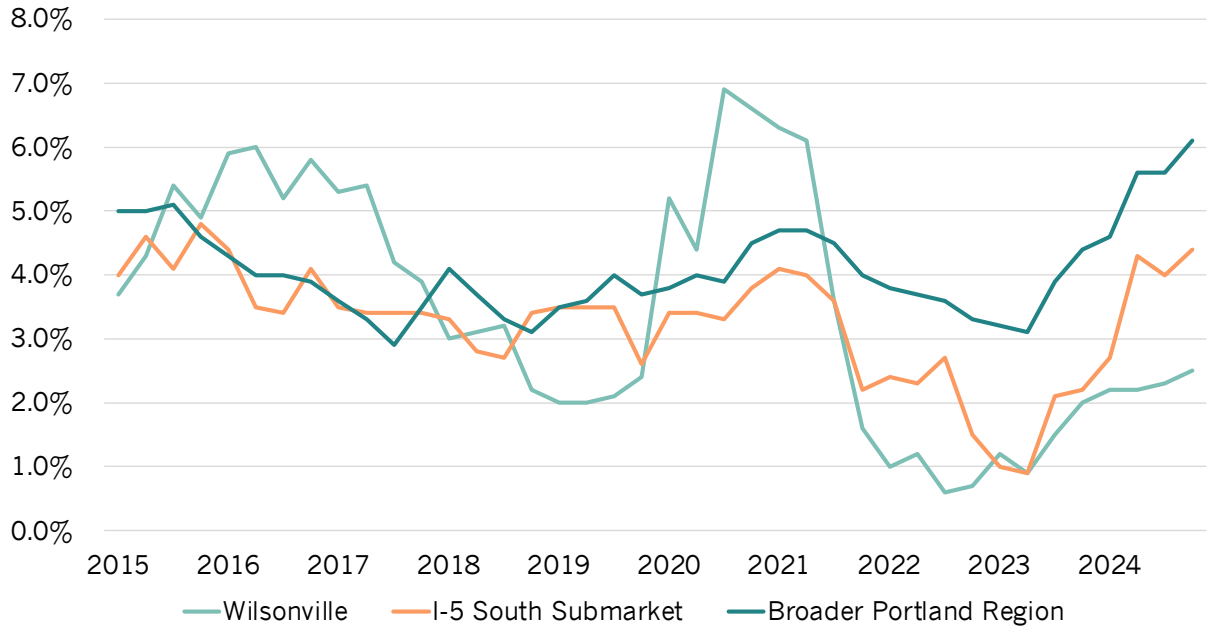
Source: CoStar, pulled February 2025

*Does not account for removal of industrial/flex space from the market

[32] The two buildings listed in CoStar are located at 96500 SW Parkway Ave (2025) and 10680 SW Clutter Road (2023). However, City staff noted three others: the Black Creek development in the Coffee Creek industrial area and two SSI Shredding facilities.

Wilsonville's industrial vacancy rate remained below 6% for most of the past decade. In 2020 and 2021 Wilsonville saw a brief spike in vacancy, likely driven by the COVID-19 pandemic, which quickly dropped to just over 1% in 2023. As of Q4 2024, Wilsonville's combined industrial and flex space vacancy rate was 2.5% (**Exhibit 20).** Wilsonville's industrial vacancy rate has been below the broader Portland region since 2021. As of Q4 2024, the broader Portland region had a vacancy rate of 6.1% and I-5 South submarket had a vacancy rate of 4.4%.

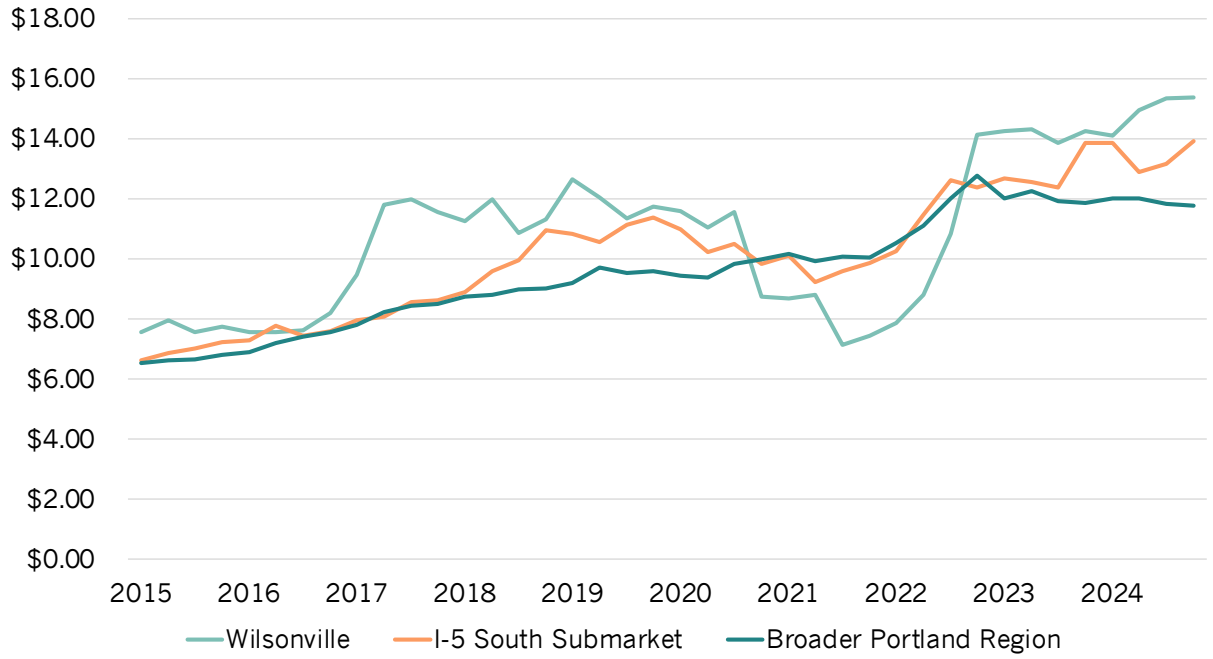
Exhibit 19: Industrial & Flex Vacancy Rate Trends, 2015-2024



Source: CoStar, pulled February 2025

Industrial/flex rents in Wilsonville increased from 2015 to 2020 and were generally higher than the broader Portland region over the period.[33] Wilsonville shows a drop in lease rates between 2020 and 2021, likely due to COVID-19 impacts. However, rates rebounded in 2023, reaching $15.38 per square foot in Q4 2024, higher than the broader Portland region ($11.77) and I-5 South submarket ($13.93). The combination of rising rents and very low vacancy rates suggests a robust industrial market in Wilsonville, potentially attracting new development, especially speculative development.

Exhibit 20: Industrial & Flex Rents Trends, 2015-2024

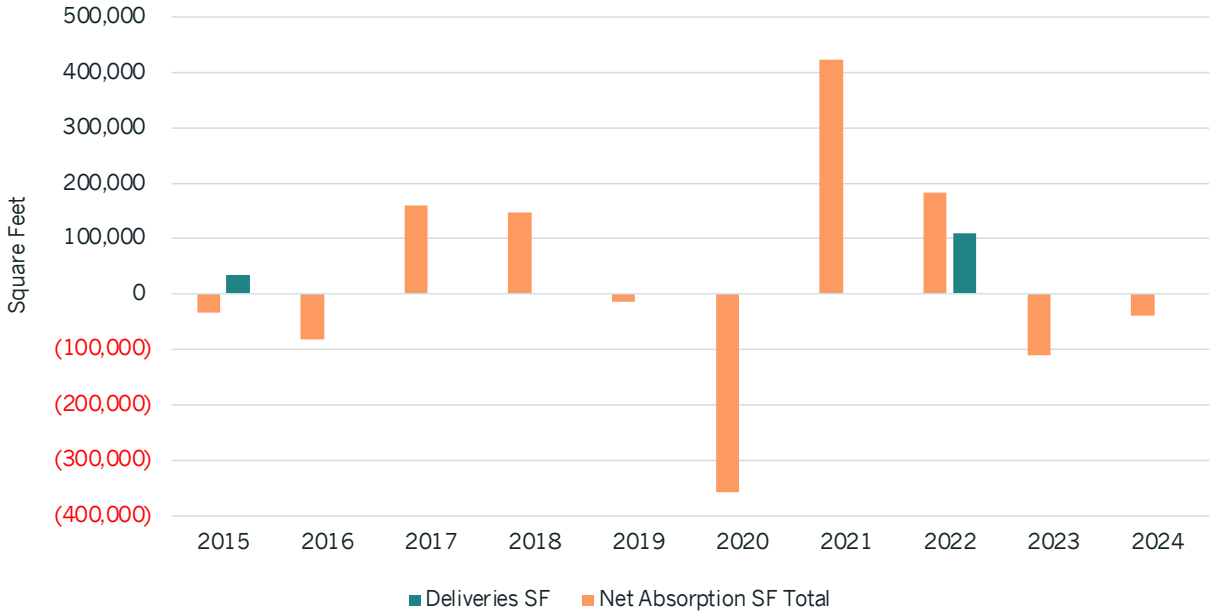


Source: CoStar, pulled February 2025

[33] Triple-Net (NNN) rents are annual rents on a per square foot basis. In a NNN lease, expenses such as taxes, insurance, and any utilities or maintenance costs, are also passed on to the tenant and paid separately from rent.

Net absorption has been generally positive for industrial properties over the past decade, with a large vacancy in 2020; however, it was followed by high positive net absorption the following year. Net absorption was negative in 2023 and through 2024 but at a smaller magnitude than in 2020.

Exhibit 21: Net Absorption for Industrial & Flex Space in Wilsonville, 2014 to 2024



Source: CoStar, pulled February 2025

TYPE OF INDUSTRIAL PRODUCT BUILT SINCE 2014

Within the industrial product type, CoStar delineates the properties into a secondary type based on their use, size, and amenities to industrial users. CoStar utilizes the following definitions for the secondary types of industrial space:

- **Distribution:** Spaces used for warehousing and distribution of inventory, that are typically 200,000 square feet or more, have clear heights of at least 28 feet, are less than 5% office space, and have site coverage that can be up to 40%.
- **Warehouse:** Buildings that are 25,000 square feet or greater, are up to 20 percent office area, have clear heights of 22 feet or greater, and have site coverage up to 50%.
- **Manufacturing:** Buildings that are typically 300,000 square feet or greater with an office area up to 50%.
- **R&D:** Flex space (see below) specifically used for research and development.
- **Flex/Other/Misc.:** A versatile building that may be used with office (corporate headquarters), research and development, mixed-use industrial and retail sales, and includes but is not limited to industrial, warehouse, and distribution uses. At least half of the rentable area of the building must be used as office space. Flex buildings typically have ceiling heights under 18 feet, with light industrial zoning. Flex buildings have also been called Incubator, Tech and Showroom buildings in markets nationwide.

Exhibit 22 shows industrial development by submarket and secondary industrial space types. Historically, the I-5 South submarket has made up about 10.2% of all industrial space in the Portland region. Over the past decade, the I-5 South submarket's share of new construction has been a bit lower. Since 2014, 8.7% of new industrial development in the region occurred in the I-5 South submarket.

The types of industrial space being built in the I-5 South submarket have also shifted:

- Warehouse and R&D space have grown in this area. While the I-5 South submarket holds about 27% of the region's total warehouse and R&D space, it captured around 35% of the new development in these categories over the past decade.
- In contrast, I-5 South has seen less manufacturing and distribution development. It holds 27% of the region's total space for these types but only accounted for 19% of new space built in the past 10 years.

Exhibit 22: Industrial Development Trends by Secondary Market Type, Broader Portland Region and I-5 South Submarket, 2014 to 2024

	ALL DEVELOPMENT		PAST 10 YEARS		I-5 CAPTURE RATES	
	BROADER PORTLAND REGION	I-5 SOUTH	BROADER PORTLAND REGION	I-5 SOUTH	ALL DEV'T	2014-2024
Distribution	49,002,646	5,677,113	16,716,663	1,222,159	11.6%	7.3%
Manufacturing	43,382,806	6,661,789	5,802,456	700,301	15.4%	12.1%
R&D	4,036,770	409,055	514,319	87,476	10.1%	17.0%
Warehouse	116,255,396	19,920,386	11,999,179	2,178,085	17.1%	18.2%
Flex/Other/Misc	156,220,367	4,831,339	24,957,511	1,053,586	3.1%	4.2%
Total	**368,897,985**	**37,499,682**	**59,990,128**	**5,241,607**	**10.2%**	**8.7%**

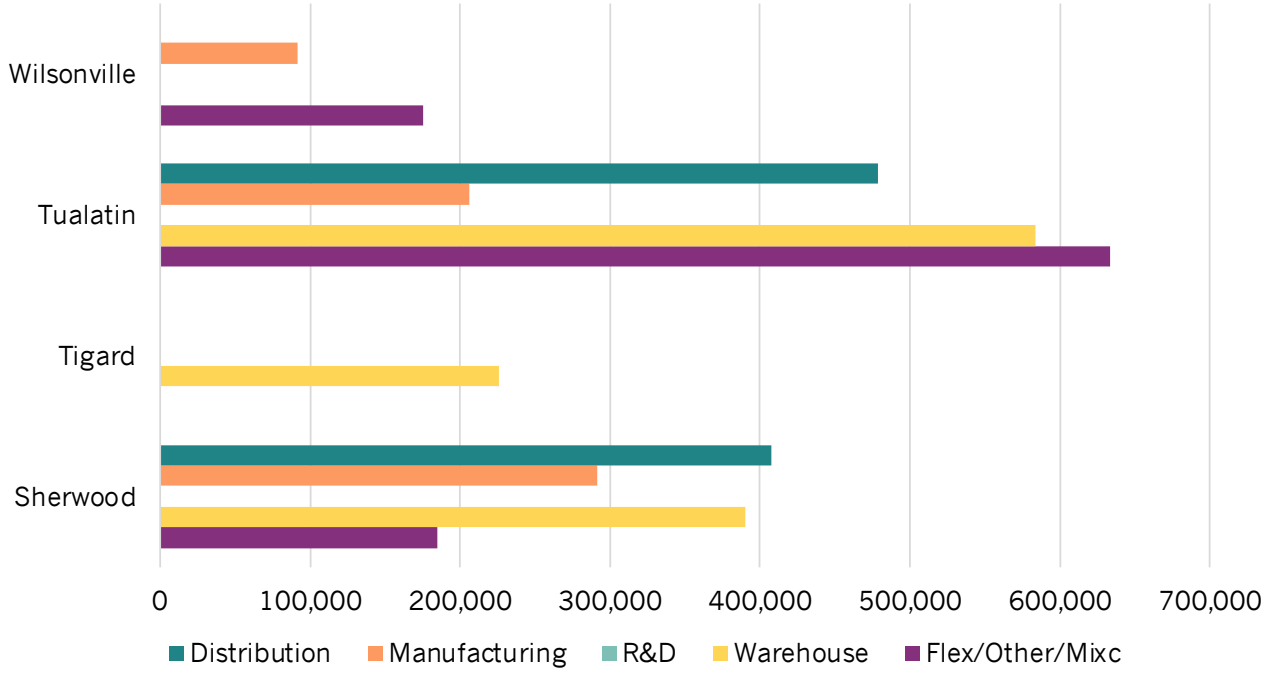
Source: CoStar, pulled August 2024

Industrial development along the I-5 South submarket has recently concentrated in Tualatin and Sherwood. This trend is likely due to Wilsonville's shortage of development-ready industrial land and large parcels, a view supported by interviews with local developers, brokers, and economic development organizations.

Many speculative industrial developers are seeking large sites, as demonstrated by recent developments in Sherwood and Tualatin on parcels exceeding 10 acres. Notable examples include the recently completed Sherwood Commerce Center on a 30+ acre site and the proposed Rock Creek industrial site development on 25 acres in Sherwood. In Tualatin, the Tualatin Sherwood Corporate Park was completed in 2023 on over 40 acres, while the Hedges Creek Industrial Park is expected to be completed in 2025 on a 20-acre site.

Local developers report that most of the industrial demand is coming from existing regional businesses rather than out-of-state companies. These local industrial users are primarily looking to expand or upgrade their current facilities within the area. Many express a desire to be outside the City of Portland and Multnomah County, citing concerns about public safety and higher rates of taxation.

Exhibit 23. Secondary Industrial Space Recently Built or Proposed in I-5 South Submarket by City, 2019-2026



Source: CoStar, pulled August 2024

Real estate leasing and development data suggest that Wilsonville's industrial market is strong but faces significant limitations to future growth. The City has very low industrial vacancy rates and higher-than-average rents, showing steady demand. However, very little new space has been built in the past decade, largely due to a shortage of development-ready industrial land and large sites. While regional interest in industrial space remains high—particularly in sectors like manufacturing and warehousing—most new development in the I-5 South submarket has occurred in neighboring cities like Sherwood and Tualatin. Without more development-ready land that is ready for construction, Wilsonville is likely to continue to miss out on capturing new industrial investment.

This section provides information about common industrial development types that are tracked by CoStar. They do not include other types of development that commonly occur in on industrial land, such as indoor recreation, medical buildings, religious institutions, and government uses.

Wilsonville's Competitive Advantages and Disadvantages

Wilsonville's economic development potential is influenced by both local factors and the broader state and national economic trends. Economic conditions in Wilsonville relative to these conditions in other portions of the Portland region form Wilsonville's competitive advantage for economic development. Wilsonville's key competitive advantages include its opportune location in the southern Portland region, positioned between Portland and Salem; access to a well-educated workforce from both the Portland region and Mid-Valley labor sheds; and a supply of industrial land for employment growth, including sites near expanding job centers in Tualatin and Sherwood. The City also benefits from strong transportation connections via I-5, I-205, and Highway 217, as well as transit services. These attributes make Wilsonville an attractive choice for businesses and residents seeking a connected, high-quality place to live and work. How the City capitalizes on these strengths will be central to its future economic development.

Wilsonville's advantages for economic development include:

- **Location.** Wilsonville is located at the southern edge of the Portland region, providing excellent access to both Portland and Salem job centers and consumer markets. Its location along the I-5 corridor allows businesses to efficiently serve a broad geographic area that spans the Portland region, Mid-Willamette Valley, and Pacific Northwest. Its proximity to both urban and rural amenities add to its appeal.
- **Transportation Infrastructure.** Wilsonville has strong regional transportation access with I-5, I-205, and Highway 217 facilitating efficient freight and commuter movement. Additional transportation strengths include existing and planned arterial roads as well as local and regional transit service provided by TriMet, WES Commuter Rail, and the South Metro Area Regional Transit (SMART).[34]

  Wilsonville is also 30 miles from the Portland International Airport and 20 from Port of Portland terminal providing connection to air and marine networks supporting container transport.
- **Foreign Trade Zone (FTZ) Access**. Wilsonville is located within Foreign Trade Zone 45 managed by the Port of Portland. Access to FTZ benefits provides advantages for firms engaged in global trade by enabling tariff deferral, duty elimination on re-exports, and logistical efficiencies. This makes Wilsonville

[34] Existing major arterials include SW Grahams Ferry Road, SW Boones Ferry Road, and SW Day Road; the City is also planning the extension of Basalt Creek Parkway.

particularly competitive for advanced manufacturing, semiconductor-related industries, and firms with complex international supply chains.

- **Availability of Industrial Land.** Wilsonville has 353 acres of vacant, buildable industrial land to accommodate employment growth. Much of this land is concentrated in two key employment areas:
  - **Coffee Creek:** Coffee Creek is supported by an active Urban Renewal District that funds critical infrastructure improvements. Coffee Creek's location near I-5 and other industrial areas makes it particularly attractive for industrial development.
  - **Basalt Creek:** Wilsonville's portion of Basalt Creek has a range of parcel sizes suitable for manufacturing, logistics, and supply chain uses.
- **Strong Industrial Base of Employment.** Wilsonville has a diverse and established industrial base. Manufacturing, wholesale trade, and construction account for 43% of total employment in the City, which is double the Portland region average. The City's manufacturing cluster includes high-tech, cleantech, electronics, materials, and food and beverage processing businesses. Wilsonville's industrial sectors support strong wage growth and contribute to economic resilience.
- **Proximity to other Growing Industrial Areas.** Wilsonville's industrial lands are a part of a larger cluster of industrial employment areas extending into Tualatin and Sherwood, offering supply chain efficiencies and complementary industry clustering.
- **Sustainable Water Supply**. Wilsonville has a sustainable water supply sourced from the Willamette River. This provides reliable capacity for industrial users with large water demands, including advanced manufacturing, semiconductor supply chains, cleantech, and food and beverage processors.
- **Business Support Services.** Wilsonville takes an active role in facilitating economic development, with dedicated programs and financing mechanisms that help reduce barriers to development, accelerate project readiness, and support job creation.
  - **Urban Renewal in Coffee Creek:** The Urban Renewal District plays a pivotal role in advancing infrastructure readiness and supporting new industrial development in Coffee Creek. Urban Renewal funds may be used to finance key infrastructure improvements in the Coffee Creek Industrial Area including roads, sewer, water, and stormwater systems helping make sites more marketable and development ready. To date, one infrastructure project has been completed: the construction of

Garden Acres Road to urban industrial standards. The Urban Renewal Plan also authorizes the purchase of land from willing sellers. The potential to buy, aggregate, and prepare land for development is a strategy that will be explored further in the EOA and Economic Development Strategy, and which merits discussion and consideration by policymakers.

  - **WIN Program (Wilsonville Investment Now).** The **WIN Program** is a citywide business incentive tool that provides a limited-duration, partial property tax rebate to attract and retain traded-sector employers. The program offers flexible eligibility criteria that align with the City's economic development and industrial land strategies.

- **Proactive City Planning and Policy Alignment**. Wilsonville demonstrates strong leadership in aligning land use, infrastructure, housing, and economic development policy. The City has proactively advanced the Wilsonville Industrial Land Readiness Study, Housing Needs and Capacity Analysis, Housing Production Strategy, and several area-wide master plans, among others. This coordinated planning framework helps provide a predictable environment for business investment. Wilsonville also collaborates closely with regional and statewide partners—including Business Oregon, Greater Portland Inc., Metro, and the Wilsonville Chamber of Commerce—to support economic development and local businesses.
- **Redevelopment Potential in Town Center**. Wilsonville's Town Center offers strong potential for redevelopment into a vibrant mixed-use district. The Town Center Plan envisions a walkable, transit-accessible hub with expanded retail, services, housing, and employment uses. Public realm investments, flexible zoning, and catalytic projects can help drive momentum for redevelopment and create a more active community commercial center. Placemaking is considered one of the best strategies for driving local economic development in the 21st century. **The redevelopment of Town Center represents one of the best opportunities the City has for creating a magnetic force that draws in traded sector and local businesses, as well as talent.**
- **Labor Market.** Wilsonville draws from both the Portland region and Mid-Valley labor sheds, providing access to a large, skilled, and diverse workforce. Thriving residential growth continues to expand the City's labor pool and supports talent retention. The City also benefits from proximity to major higher education institutions that strengthen its workforce pipeline, including local campuses of **Clackamas Community College** and **Oregon Institute of Technology,** as well as regional colleges and universities such as **Portland**

Community College, Chemeketa Community College, Portland State University, **University of Portland**, and **Willamette University**.

- **Quality of Life.** Wilsonville's high quality of life is a key factor in attracting and retaining both businesses and talent. The City offers a balanced living environment with well-planned neighborhoods, a variety of housing options, high-performing K-12 schools, environmental stewardship, high quality urban amenities like its parks and library, and access to outdoor recreation. Its location provides convenient access to both urban amenities in the Portland region and rural amenities in the Willamette Valley and surrounding areas.

Wilsonville's disadvantages for economic development include:

- **Limited Supply of Development-Ready Industrial Sites.** Wilsonville has over 350 acres of vacant industrial land, but much of it in Coffee Creek and Basalt Creek is not ready for development due to the absence of urban-level infrastructure. Ongoing investment is needed to support future industrial growth. In Basalt Creek in particular—especially the West Railroad area—major infrastructure gaps remain. Physical access is also constrained by limited vehicular routes and a low railroad undercrossing on Grahams Ferry Road. Addressing these constraints will require substantial investment and coordination.
- **Small Lot Sizes and Fragmented Ownership Patterns.** The City has a limited inventory of large, contiguous, buildable parcels, which are attractive to large industrial owner-users, as well as speculative developers who need the efficiencies of a large project in order to make the development financially feasible. Fragmented ownership, small lot sizes, and lack of coordinated property aggregation in key areas create barriers to assembling larger sites suitable for modern industrial uses.
- **Lower-Intensity Existing Uses on Industrial Land.** Many parcels in Coffee Creek and Basalt Creek are used for low-density contractor establishments and outdoor storage. These uses do not align with Wilsonville's vision for higher-intensity, urban-style employment development. Because they generate steady income for property owners, there is little incentive to sell and/or redevelop. This phenomenon has limited industrial growth and development and will continue to do so without intervention.
- **Power Supply Issues.** Some future industrial users may need more than 5 megawatts of power. Meeting this demand will require additional investment in power infrastructure, as well as long lead times. Close coordination with Portland General Electric will be essential to ensure capacity is available.

- **Traffic and Congestion.** The I-5 corridor through Wilsonville experiences congestion from regional traffic, particularly during peak hours, which then backs up onto Wilsonville key arterials. Planned transportation improvements will help but may be years in coming. Ongoing regional growth may continue to pressure transportation infrastructure and increase travel times for both freight and commuters.
- **Regional Housing Affordability Challenges.** Like many parts of the Portland region, Wilsonville faces regional housing affordability pressures that can affect workforce attraction and retention. Although the City has pursued strategies to expand housing options, affordability remains a key issue for both lower- and middle-income workers.
- **Limited Urban Amenities**. Wilsonville's suburban setting and limited mix of local amenities such as restaurants, shopping, and entertainment may make it harder to attract workers, particularly younger professionals in technology, creative, and knowledge-based fields. Strengthening live-work-play environments, like those envisioned in Town Center, will be key to maintaining the City's competitiveness for talent.

Public Facilities and Services

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

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

WATER

Wilsonville's primary drinking water source is treated water from the Willamette River. The Willamette River Water Treatment Plant has a total treatment capacity of 20 million gallons per day (mgd). Of that capacity, 13.3 mgd (two-thirds) is owned by the City of Wilsonville, and 6.7 mgd (one-third) is owned by the City of Sherwood. The City of Wilsonville also has eight groundwater wells that serve as a backup supply.

Wilsonville currently has sufficient water supply and treatment capacity to meet existing and future employment needs. The Water Distribution System Master Plan is

being updated to evaluate capacity and distribution improvements that will support continued growth within the Wilsonville. The next major expansion of the treatment plant, which will increase total capacity to 30 mgd, is planned for the 2035 to 2040 timeframe. This expansion will ensure long-term adequacy of the water system to serve both residential and employment growth.

There are no known water capacity limitations that would restrict new industrial or commercial development in the City over the 2026 to 2046 time period.

WASTEWATER

Wilsonville's Wastewater Treatment Plant has a total treatment capacity of 4 mgd. The 2023 Wastewater Treatment Plant Master Plan evaluated the capacity of individual unit processes and identified those that may exceed capacity at buildout. Upgrades to those unit processes have been incorporated into the City's capital improvement program. The first phase, improvements to the aeration basins, is currently under design.

The City recently updated its System Development Charges (SDCs) to provide funding for these capacity improvements. A Wastewater Collection System Master Plan update is scheduled for completion by 2028, which will identify additional system improvements needed to serve future development.

There are currently no known wastewater capacity limitations that would prevent new industrial or commercial development. Planned improvements will ensure the system can support anticipated employment growth through 2046.

STORMWATER

The City updated its Stormwater Master Plan in 2024. The plan provides guidance for stormwater management and identifies system improvements to address capacity and conveyance needs. There are no known stormwater capacity issues that would limit employment growth.

TRANSPORTATION

Traffic congestion on the I-5, specifically the Boone Bridge, remains the most significant transportation challenge affecting Wilsonville. The bridge serves as a critical north–south connection between the Portland and Salem metropolitan areas, carrying regional commuter and freight traffic through the City. Peak-hour congestion creates recurring delays that impact both residents and businesses.

The Oregon Department of Transportation (ODOT) is leading the I-5 Boone Bridge Replacement Project to address these issues. The project will replace the existing bridge with a new, seismically resilient structure, add a southbound auxiliary lane

between the Wilsonville Road entrance and the OR 551 exit, make safety improvements at the Charbonneau interchange, and provide new walking and biking connections across the Willamette River. The project has completed the Planning and Environmental Linkages (PEL) study phase, positioning it to move forward once funding becomes available. Because the Boone Bridge is part of the state highway system, project implementation and timing are under ODOT's jurisdiction rather than the City's direct control.

Beyond the Boone Bridge corridor, Wilsonville's local transportation network is functioning well. The City actively monitors system performance and publishes a transportation performance monitoring report every three years to track progress toward its goals. Local facilities identified in the City's Transportation System Plan have adequate capacity to support planned employment and population growth, and improvements are being implemented as needed.

There are no additional transportation limitations currently identified that would restrict employment growth over the planning period.

3. Employment Growth and Site Needs

Statewide Planning Goal 9 requires cities to estimate how much land is needed for commercial and industrial development over a 20-year period. In Wilsonville, that means identifying how much employment growth is expected by 2046 and what kinds of businesses are likely to locate here. This chapter presents an employment forecast and analysis of potential growth industries that build from recent economic trends.

Forecast of Employment Growth and Land Demand

Demand for industrial and commercial land in Wilsonville will be shaped by the expansion and relocation of existing businesses as well as the establishment of new ones. The employment projections in this section build on Wilsonville's current employment base and assume that future growth will align with the Oregon Employment Department's (OED) regional forecasts for the 2026–2046 period.

The employment forecast does not account for a major shift in employment that could occur if one or more large employers were to locate in Wilsonville during the planning period. Such a change would exceed the growth anticipated in the City's employment forecast and the associated land needs. This would be true not only for employment uses but also for housing, parks, and other community needs. While major economic events, such as the successful recruitment of a very larger employer, are difficult to incorporate into an Economic Opportunities Analysis, their implications are relatively predictable: increased demand for land (of all types) and for public services.

ECOnorthwest's approach to projecting demand for industrial and commercial land includes four steps:

1. **Establish base employment** – Begin with the estimate of covered employment in Wilsonville, as shown in **Exhibit 7.** Since covered employment does not include all workers, this number is adjusted to reflect total employment in the City.
2. **Project total employment** – Consider forecasts and other factors that may influence employment growth in Wilsonville over the 20-year planning horizon.
3. **Allocate employment** – Assign projected employment to various land use categories.

4. **Estimate land demand** – Calculate employment land demand based on projected growth and assumptions about future employment densities.

This methodology follows administrative rule requirements and incorporates input the Technical Advisory Committee (TAC) that guided this project.

Employment Base for Projection

To estimate future employment land needs, ECOnorthwest first developed a baseline of current employment in Wilsonville. This baseline provides the foundation for forecasting job growth and associated land needs through 2046.

ECOnorthwest began with covered employment[35] data from the Oregon Employment Department's confidential Quarterly Census of Employment and Wages (QCEW), which includes most wage and salary employment. According to this data, Wilsonville had approximately 22,778 covered employees in 2023 (see Exhibit 6 and Exhibit 24). This is the best and most currently available data for Wilsonville and reflects changes in employment post-COVID.

However, covered employment does not account for all workers in the economy, notably excluding sole proprietors. An analysis of the data shows that *covered* employment reported by the Oregon Employment Department for Clackamas County represents only about 68% of *total* employment reported by the U.S. Bureau of Economic Analysis. This ratio was evaluated for each employment sector in Clackamas County, and the resulting figures were used to estimate the number of noncovered employees.

Based on this methodology, ECOnorthwest estimates that Wilsonville had approximately **32,332 total jobs** in 2023 **(Exhibit 24).** This estimate serves as the starting point for evaluating future employment growth and land needs.

[35] Covered employment includes employment covered by unemployment insurance.

Exhibit 24. Estimated Total Employment by Sector, Wilsonville City Limits and UGB Area*, 2023

Sector	Covered Employment	Estimated Total Employment	Covered % of Total
Agriculture, Forestry, Fishing, and Hunting	17	30	56%
Construction	3,010	3,917	77%
Manufacturing	3,719	4,043	92%
Wholesale Trade	3,318	3,977	83%
Retail Trade	2,125	2,834	75%
Transportation, Warehousing, and Utilities	864	1,965	44%
Information	78	118	66%
Finance and Insurance	172	438	39%
Real Estate and Rental and Leasing	233	1,748	13%
Professional, Scientific, and Technical Services	2,330	4,325	54%
Management of Companies and Enterprises	474	563	84%
Administrative, Support, Waste Management an	2,023	2,763	73%
Private Education	102	196	52%
Health Care and Social Assistance	989	1,187	83%
Arts, Entertainment, and Recreation	188	441	43%
Accommodation and Food Services	1,352	1,503	90%
Other Services and Public Administration	483	902	54%
Government	1,301	1,381	94%
Total	**22,778**	**32,332**	**70%**

Source: 2023 covered employment from confidential Quarterly Census of Employment and Wage (QCEW) provided by the Oregon Employment Department. ECOnorthwest estimate for total employment.
*See Exhibit 37 for a map of the planning area.

Employment Projection

The employment forecast covers the 2026 to 2046 period, requiring an estimate of total employment for Wilsonville in 2026. The base employment starts with the estimate of 32,332 total jobs in Wilsonville in 2023, shown in **Exhibit 24.**

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

Exhibit 25 presents four employment growth rate scenarios:

- Metro Urban Growth Report regional growth rate: 0.42% annual employment growth.
- Oregon Employment Department's (OED) regional growth rate: 0.85% annual employment growth.
- Wilsonville's historic employment growth rate (2007-2023): 0.86% annual employment growth.
- Wilsonville's Housing Needs and Capacity Analysis projected household growth rate (2024-2044): 1.2% annual growth.

The OED regional growth rate (0.85%) is the safe harbor option identified in OAR 660-024-0040(9)(a)(A).

Exhibit 25. Forecast Rate Options for Employment Growth in Wilsonville, 2026-2046

Year	Jobs grow at the rate of... Urban Growth Report (0.42%)	OED Regional Employment Growth (0.85%)	Historic Employment Growth in Wilsonville (2007-23) (0.86%)	HNCA Household Growth Rate (1.20%)
2026	32,741	33,165	33,168	33,509
2046	35,607	39,297	39,326	42,537
Change 2026 to 2046				
Employees	2,866	6,132	6,158	9,028
Percent	9%	18%	19%	27%
Growth Rate	0.42%	0.85%	0.86%	1.20%

Source: ECOnorthwest

The City selected a forecast based on the regional employment growth rate of 0.85% average annual growth, consistent with the safe harbor in OAR 660-024-0040(9)(a). This safe harbor allows the City to assume that the current number of jobs in Wilsonville will grow at the same rate as the regional employment growth rate from the most recent Oregon Employment Department forecast.[36]

Exhibit 26 shows projected employment growth in Wilsonville from 2026 to 2046, assuming an average annual growth rate of 0.85%. By 2046, Wilsonville is expected to have 39,297 employees which is an increase of 6,132 employees, or 18%, over the 20-year period.

This forecast assumes employment growth is also fairly consistent with Wilsonville's historical rate. It is faster than the regional growth rate in Metro's Urban Growth Report but slower than the City's projected household growth rate. The projection represents a modest and realistic pace of expansion that aligns with statewide and national trends of slower employment growth. It also reflects Wilsonville's role as a regional employment center that may grow faster than the broader Portland region because of its concentration of industrial land.

In the near term, growth over the next five to ten years is expected to occur more gradually as much of Wilsonville's industrial land is not yet development-ready and will require additional infrastructure investment. Commercial growth will depend on redevelopment opportunities in Town Center and the reuse of large vacant commercial properties such as the former Albertsons and Regal Cinema sites. It may also depend on future policy changes that allow underutilized industrial land to support a broader mix of commercial uses.

Exhibit 26. Employment Growth in Wilsonville, 2026-2046

Year	Total Employment
2026	33,165
2046	39,297
Change 2025 to 2045	
Employees	6,132
Percent	18%
Growth Rate	0.85%

Source: ECOnorthwest

[36] During the EOA process, ECOnorthwest used the OED forecast rates for the 2023-2033 period.

Allocate Employment to Different Land Use Types

The next step in forecasting employment is to allocate future employment to broad categories of land use. Firms wanting to expand or locate in Wilsonville will look for a variety of site characteristics, depending on the industry and circumstances. ECOnorthwest grouped employment into four broad categories of land use based on the North American Industrial Classification System (NAICS): industrial, retail commercial, office and commercial services, and government.[37]

Exhibit 27 shows the expected share of employment by land use type in 2026 and the forecast of employment growth by land use type in 2046 in Wilsonville. The results assume that the share of employment in each category will remain the same.

Exhibit 27. Forecast of Employment Growth by Land Use Type, Wilsonville UGB, 2026–2046

Land Use Type	2026		2046		Change
	Employment	% of Total	Employment	% of Total	2026 to 2046
Industrial	14,292	43%	16,934	43%	2,642
Retail Commercial	2,907	9%	3,445	9%	538
Office & Commercial Services	14,549	44%	17,239	44%	2,690
Government	1,417	4%	1,679	4%	262
Total	**33,165**	**100%**	**39,297**	**100%**	**6,132**

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

Estimate of Demand for Commercial and Industrial Land

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

- **Employment density**. Employment density, measured as employees per net acre, reflects the ratio of the number of employees to the amount of developed employment land.

  Based on an empirical evaluation of commercial and industrial zones in the City that are at or near buildout, this study assumes an average of 8.9 employees per acre for industrial land and 33.1 employees per acre for commercial land **(Exhibit 28).** Actual densities vary by specific use; for

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

example, a two-story commercial building may have a higher density, while a convenience store with a large parking lot may have a lower density. Using an average helps account for these variations.

- **Conversion from net to gross acres**. Employment density data is expressed in *net* acres, which exclude land for public rights-of-way. Future employment land needs should include both the land within tax lots for employment use and the land required for public rights-of-way. One way to estimate this total is to convert *net* acres to *gross* acres based on assumptions about the share of land dedicated to rights-of-way. [38] This conversion is expressed as the percentage of gross acres occupied by rights-of-way.

  Based on an empirical evaluation of Wilsonville's existing net-to-gross ratios in areas designated for and developed with industrial and commercial uses, ECOnorthwest applied a net-to-gross conversion factor of 8% for industrial land and 13% for commercial land.

Using these assumptions, the forecasted growth of 6,132 new employees will result in the following demand for vacant (and partially vacant) employment land: 321 gross acres of industrial land and 110 gross acres of commercial land.[39]

Exhibit 28. Demand for Vacant Land to Accommodate Employment Growth, Wilsonville, 2026–2046

Land Use Type	New Employment	Employees per Net Acre	Land Demand (Net Acres)	Land Demand (Gross Acres)
Industrial	2,642	8.9	297	321
Commercial and Retail	3,228	33.1	97.5	110
Total	**5,870**	**-**	**395**	**431**

Source: ECOnorthwest

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

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

Target Industries

Wilsonville's economy benefits from several advantages that help attract and support a diverse mix of industries. The City's location along I-5 at the southern edge of the Portland metro area provides easy access to the broader region, Oregon's Mid-Valley, and national and international markets through nearby highway, rail, port, and air connections. Employers can draw from a large and skilled labor force across both regions, offering a strong pool of educated workers.

Wilsonville also has vacant industrial land, including potentially large sites (if aggregated) in Basalt Creek and Coffee Creek that are recognized regionally as key areas for future employment growth. These assets, combined with the City's high quality of life, well-planned neighborhoods, parks, and community amenities, help attract and retain businesses and workers.

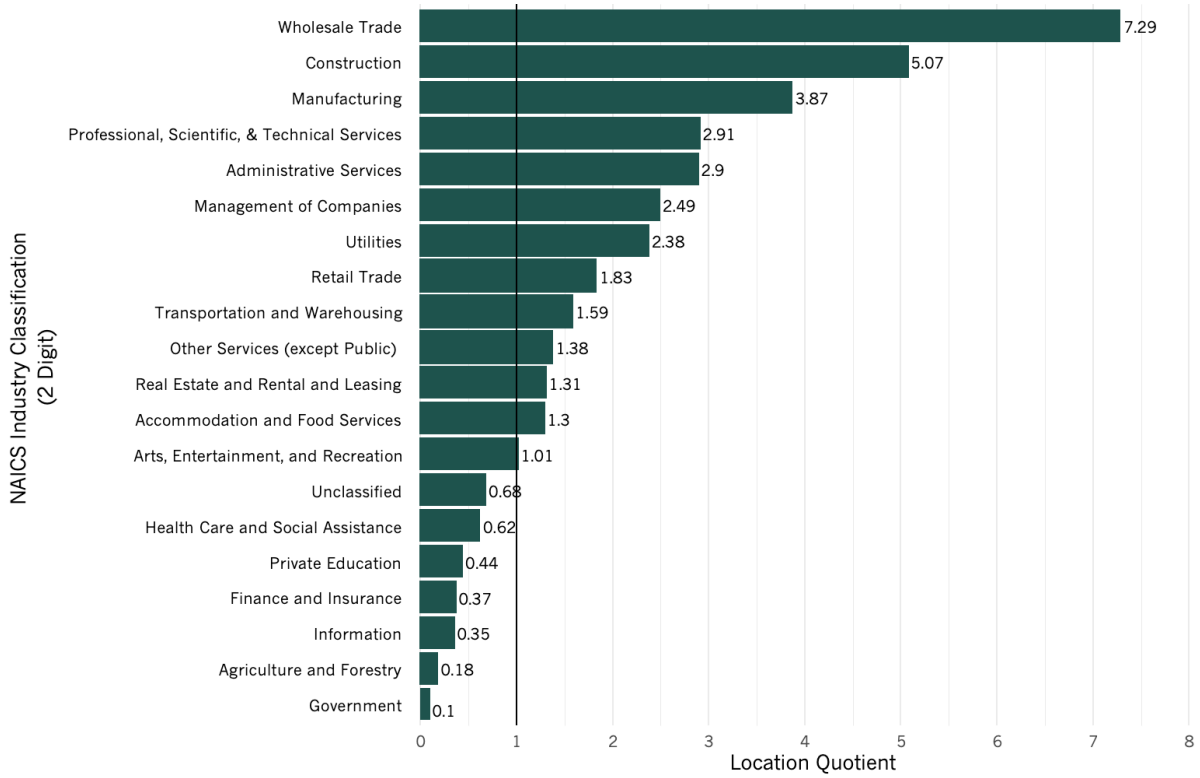
Together, these advantages have shaped an employment base with strong concentrations in wholesale trade (LQ 7.29), construction (LQ 5.07), and manufacturing (LQ 3.87) which are industries that provide higher-than-average wages.[40] For example, an LQ of 7.29 indicates that wholesale trade employment in Wilsonville is more than seven times higher than the national average. The City also shows notable specialization in professional services, administrative services, and management services, each with an LQ greater than 2.0.

By contrast, sectors such as healthcare and social assistance (LQ 0.62), educational services (LQ 0.44), finance and insurance (LQ 0.37), and information (LQ 0.35) have much lower concentrations, indicating these sectors are underrepresented in Wilsonville compared to the national average.

Exhibit 29 shows employment concentration by broad industry (2-digit NAICS) in Wilsonville compared with the United States in 2023. **Exhibit 30** provides additional detail at the 3-digit NAICS level, highlighting industries with above-average wages (light green), strong employment levels, and high location quotients that signal competitive advantage. Specialized industries in manufacturing, wholesale trade, and construction stand out as core drivers of the City's economy.

[40] A location quotient (LQ) of 1.0 indicates that the industry's share of local employment matches the U.S. average. Industries with higher concentration have more employment in Wilsonville than the national average, indicating a strength in employment in that industry. Typically, a LQ of 1.25 or greater indicates a specialization within that industry.

Exhibit 29. Employment Concentration by Industry, Wilsonville Compared to the U.S., 2023



Source: Oregon Employment Department and U.S. Bureau of Labor Statistics, Quarterly Census of Employment and Wages, 2023

Exhibit 30. Concentration of Industries and Employment, Wilsonville, 2023

	High Employment (250 employees or more)	Low Employment (at least 50 employees)
▪ High Location Quotient	▪ Computer and Electronic Product Manufacturing ▪ Nonmetallic Mineral Product Manufacturing ▪ Merchant Wholesalers, Nondurable Goods ▪ Electrical Equipment, Appliance, and Component Manufacturing ▪ Machinery Manufacturing ▪ Specialty Trade Contractors ▪ Heavy and Civil Engineering Construction ▪ Motor Vehicle and Parts Dealers ▪ Merchant Wholesalers, Durable Goods ▪ Fabricated Metal Product Manufacturing ▪ Construction of Buildings ▪ Truck Transportation ▪ General Merchandise Retailers ▪ Profession, Scientific, and Technical Services ▪ Administrative and Support Services ▪ Management of Companies and Enterprises ▪ Nursing and Residential Care Facilities ▪ Accommodation	▪ Wholesale Trade Agents and Brokers ▪ Waste Management and Remediation Services ▪ Transit and Ground Passenger Transportation ▪ Plastics and Rubber Products Manufacturing ▪ Utilities ▪ Paper Manufacturing ▪ Rental and Leasing Services ▪ Religious, Grantmaking, Civic, Professional, and Similar Organizations ▪ Miscellaneous Manufacturing ▪ Support Activities for Transportation ▪ Amusement, Gambling, and Recreation Industries ▪ Repair and Maintenance ▪ Sporting Goods, Hobby, Musical Instrument, Book, and Miscellaneous Retailers
Low Location Quotient	▪ Food Services and Drinking Places ▪ Ambulatory Health Care Services	▪ Warehousing and Storage ▪ Food Manufacturing ▪ Real Estate ▪ Health and Personal Care Retailers ▪ Personal and Laundry Services ▪ Food and Beverage Retailers ▪ Gasoline Stations and Fuel =Dealers ▪ Credit Intermediation and Related Activities ▪ Educational Services ▪ Social Assistance

Source: Oregon Employment Department, Quarterly Census of Employment and Wages, 2023.
Note: Green highlighting indicates higher than Wilsonville's average wage.

Potential Growth Industries

An analysis of potential growth industries in Wilsonville considers two core questions: (1) Which industries are most likely to be attracted to Wilsonville? and (2) Which industries best support Wilsonville's economic development goals? The selection of growth industries is informed by the City's economic development objectives, current economic conditions in Wilsonville and the broader Portland Metro region, and Wilsonville's competitive position.

The industries identified as having potential for growth in Wilsonville are:

- **Manufacturing.** Manufacturing is a cornerstone of Wilsonville's economy, accounting for roughly **16% of total covered employment in 2023**, with average annual wages well above the citywide average. The City's location along I-5, access to a skilled regional workforce, and proximity to existing industrial areas create advantages for manufacturers seeking efficient supply chain and distribution connections. Existing manufacturing industries with strong concentrations and high levels of employment include:
  - Computer and electronic products manufacturing
  - Nonmetallic mineral products manufacturing
  - Electrical equipment and components manufacturing
  - Machinery manufacturing
  - Fabricated metal product manufacturing

  Demand for manufacturing is expected to remain strong over the next two decades, driven by national and regional trends such as reshoring of production, growth in advanced manufacturing technologies, and public and private investments in sectors like semiconductors and clean technology. Rising transportation costs, the desire for supply chain resilience, Wilsonville's location at the southern part of the Portland region, Wilsonville's supply of industrial land, and Oregon's skilled labor pool further position Wilsonville to capture a share of this growth.

  The ability to sustain and grow this sector will depend on the City's capacity to assemble large, contiguous parcels and to provide the necessary infrastructure, particularly transportation, water, wastewater, and power, to support high-intensity manufacturing operations. Phase 1 of the Wilsonville Industrial Land Readiness project identified specific growth opportunities in semiconductor supply chain industries, clean technology (cleantech) such as renewable energy and sustainable manufacturing solutions, and other advanced manufacturing niches. These industries align with national and

regional investment trends and can build on Wilsonville's existing industrial base to deliver high-wage, traded-sector jobs.

- **Wholesale Trade.** Wilsonville has an established concentration of wholesale trade businesses, including both durable and nondurable goods. These firms benefit from the City's location along I-5 and its central position between the Portland metro and Mid-Valley regions, allowing efficient service to multiple markets. Wholesale trade in Wilsonville is closely tied to the City's manufacturing base, supplying inputs and moving finished products to market. While population growth in the region may be more limited in the future, demand for wholesale activity is expected to remain stable, supported by business-to-business transactions and regional supply chain needs. Continued success in this sector will depend on the availability of sites that can accommodate operational needs while managing the challenges of congestion on I-5, which affects the efficiency of freight movement.
- **Professional, Scientific, and Technical Services.** Although the office market is adjusting to hybrid work trends, there is ongoing demand for specialized professional and technical services, particularly those that support the City's industrial and traded-sector base. This category encompasses a wide range of activities, including professional consulting, engineering, scientific research, testing, and advanced technology services. In Wilsonville, it includes both traditional office-based firms and innovation-oriented businesses such as life sciences and R&D operations that often locate near industrial clusters. Future growth is most likely in flexible, smaller-scale office or lab-flex spaces located near industrial areas or in mixed-use environments such as Town Center.
- **Local Services and Retail.** As Wilsonville's population and employment base grow, demand will increase for a variety of resident-serving businesses. These include retail stores, restaurants, medical and dental offices, childcare providers, personal services, and other neighborhood-oriented establishments. Such services contribute to quality of life, provide everyday convenience, and support the City's attractiveness as a place to live and work.

  Services for residents also present opportunities for entrepreneurship and small business development. The City has expressed particular interest in attracting small-scale, distinctive retailers and restaurants that can help differentiate Wilsonville's commercial areas, especially in Town Center, from those in surrounding communities. While many of these businesses are locally serving and offer lower average wages than traded-sector industries, they play a vital role in meeting community needs and fostering a vibrant local economy.

Site Needs for Potential Growth Industries

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

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

The potential growth industries described in the prior section are a mixture of business sizes, which will require a mixture of site sizes. **Exhibit 31** shows the typical site needs for industrial businesses in Oregon.

Exhibit 31. Industrial Development Competitiveness Matrix, Business Oregon

INDUSTRY SECTOR	SITE SIZE (ACRES)	SITE TOPOGRAPHY (SLOPE)	TRIP GENERATION (ADT/ACRE)	SITE ACCESS (MAX DISTANCE IN MILES TO INTERSTATE OR MAJOR ARTERIAL)	RAILROAD OR PORT ACCESS	ELECTRICITY REQUIREMENTS
Clean-Tech Manufacturing	5-100+	0-5%	40 to 80	w/in 10	Preferred	4-6 MW
Heavy Industrial/Manufacturing	10-100+	0-5%	40 to 60	w/in 10	Preferred	2 MW
Food Processing	5-25+	0-5%	50 to 65	w/in 30	Preferred	2-6 MW
Advanced Manufacturing & Assembly	5-25+	0-7%	30 to 60	w/in 15	Not Required	1-2 MW
General Manufacturing	5-15+	0-5%	30 to 50	w/in 20	Preferred	0.5 MW
Business Park and R&D Campus	20-100+	0-7%	60 to 150	N/A	Preferred	0.5-1.5 MW
Business Admin Services	5-15+	0-12%	170 to 180	N/A	Not Required	0.5 MW
Regional Warehouse/Distribution	20-100+	0-5%	20 to 80	w/in 5 (only interstate or equivalent)	Preferred	1 MW
Local Warehouse / Distribution	10-25+	0-5%	20 to 80	w/in 5 (only interstate or equivalent)	Preferred	1 MW
UAV Manufacturing/Research	10-25+	0-7%	30 to 50	N/A	Not Required	0.5 MW
Data Center	10-50+	0-7%	20 to 30	w/in 30	Avoid / Not Required	5-100 MW
Rural Industrial	10-50+	0-5%	30 to 50	w/in 60	Preferred	1 MW

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

Potential growth industries in Wilsonville will require a variety of building and site types depending on their operational needs, ranging from existing multi-tenant industrial space to large, development-ready sites for single users or business parks. Manufacturing and other industrial businesses likely to locate in Wilsonville will have diverse space needs, ranging from:

- **Existing industrial and flex space.** The majority of demand is for space in existing industrial or flex buildings that can accommodate immediate occupancy. These spaces typically serve small and mid-sized businesses, such as suppliers, logistics firms, manufacturers, and service providers, that benefit from shared facilities, lower upfront costs, and proximity to arterial corridors and other industrial users.
- **Small-scale development sites (1 to 5 acres).** Small-scale sites are typically occupied by contractors, specialized manufacturers, and service-oriented businesses that want ownership of their building and yard space. Development is usually owner-driven or by small developers constructing single buildings. These projects often feature limited office space with outdoor storage or yard areas and need convenient access to major roads and utilities.
- **Mid-sized development sites (5 to 25 acres).** Mid-sized sites accommodate larger industrial users or single-tenant buildings developed for manufacturing, assembly, or distribution. These sites can also support smaller industrial parks with multiple buildings and tenants. These sites generally require strong highway access and high-capacity infrastructure such as water, wastewater, and power to support a range of business operations.
- **Large industrial or manufacturing sites (25 acres or more).** Large-scale users, including manufacturers, logistics centers, or industrial business park and research campuses, require sites of 25 acres or more that are fully serviced and have direct access to the regional transportation network. These properties are typically developed as single-user, build-to-suit projects or as master-planned business parks designed to accommodate multiple large users. They require substantial infrastructure capacity and strong highway access. Given infrastructure and land-readiness constraints, these sites are limited in Wilsonville and throughout the region.

Commercial development in Wilsonville includes a broad mix of uses such as retail stores, restaurants, entertainment venues, offices, personal and professional services, and hospitality establishments. These businesses depend on locations with convenient access to customers, nearby neighborhoods, and other businesses. Much of Wilsonville's opportunity for new commercial development lies in the redevelopment and reuse of existing commercial properties.

- **Space in existing buildings (multi-tenant and standalone).** Many retail, restaurant, office, and service-oriented businesses prefer space in existing shopping centers, mixed-use developments, or other multi-tenant buildings. Some users, such as grocery stores, fitness centers, offices, and larger restaurants, occupy standalone buildings developed on individual sites or as part of larger centers.
- **Land for custom development (1 to 5 acres).** A smaller number of businesses, including hotels, larger retailers, larger restaurants, medical or professional offices, and auto-related services, require land for a purpose-built facility. These users typically seek one- to five-acre sites in areas with strong transportation access and available infrastructure to support higher customer traffic.

4. Buildable Lands Inventory

The **Buildable Lands Inventory (BLI)** identifies commercial and industrial lands available for employment-related development within the Wilsonville area. This area includes the City limits and Wilsonville's City limits and Wilsonville's portion of the Metro UGB.[41]

The inventory is sometimes characterized as the *supply* of land available to support future employment growth. The amount of land needed to accommodate anticipated growth, often referred to as *demand* for land, depends on the type of employment-related development and other factors.

This section summarizes the results of the commercial and industrial buildable lands inventory for the Wilsonville City limits and UGB area. The analysis, conducted by ECOnorthwest, is based on GIS data from the City of Wilsonville, Metro, and the State of Oregon. City staff reviewed the findings.

The BLI process includes the following steps:

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

The remainder of this section presents the results of the BLI in both tabular and map formats. Appendix A provides a detailed explanation of the inventory methodology.

[41] This area includes the Wilsonville portion of the Basalt Creek Planning Area in the northwest quadrant of the City.

Land Base

The land base for the BLI includes all tax lots within the Wilsonville City limits and UGB area that fall under comprehensive plan designations that allow for employment. **Exhibit 32** provides a breakdown of the land base by Wilsonville Comprehensive Plan designation within Wilsonville.

Exhibit 32. Employment Land Base by Wilsonville Comprehensive Plan Designation, Wilsonville City limits and UGB area, 2025

Plan Designation	Number of Tax Lots	Percent	Total Tax Lot Acreage	Percent (Total Acreage)
Commercial	297	32%	224	8%
Industrial	526	56%	1,819	63%
Town Center	57	6%	136	5%
Public	33	4%	480	17%
Undesignated	24	3%	216	8%
Total	**937**	**100%**	**2,876**	**100%**

Source: ECOnorthwest analysis, City of Wilsonville, Metro

Note: The number of tax lots represented is greater than the actual total number of tax lots in the analysis because several tax lots have multiple plan designations on the tax lot.

Buildable Area Status

Exhibit 33 summarizes the total acres of commercial and industrial tax lots, classified by buildable area status. ECOnorthwest used a rule-based classification (described in Appendix B) to determine the initial development status. These classifications were then confirmed through a series of reviews by ECOnorthwest and City staff, based on local knowledge and review of aerial maps.

Exhibit 33. Employment Acres by Classification and Wilsonville Comprehensive Plan Designation, Wilsonville City limits and UGB area, 2025

Plan Designation	Total Acres	Developed Acres	Constrained Acres	Buildable Acres
Commercial	224	194	25	4
Industrial	1,819	1,005	506	308
Town Center	136	125	2	9
Public	480	336	144	0.1
Undesignated	216	67	104	45
Total	**2,876**	**1,729**	**782**	**366**

Source: ECOnorthwest analysis, City of Wilsonville, Metro

Development Constraints

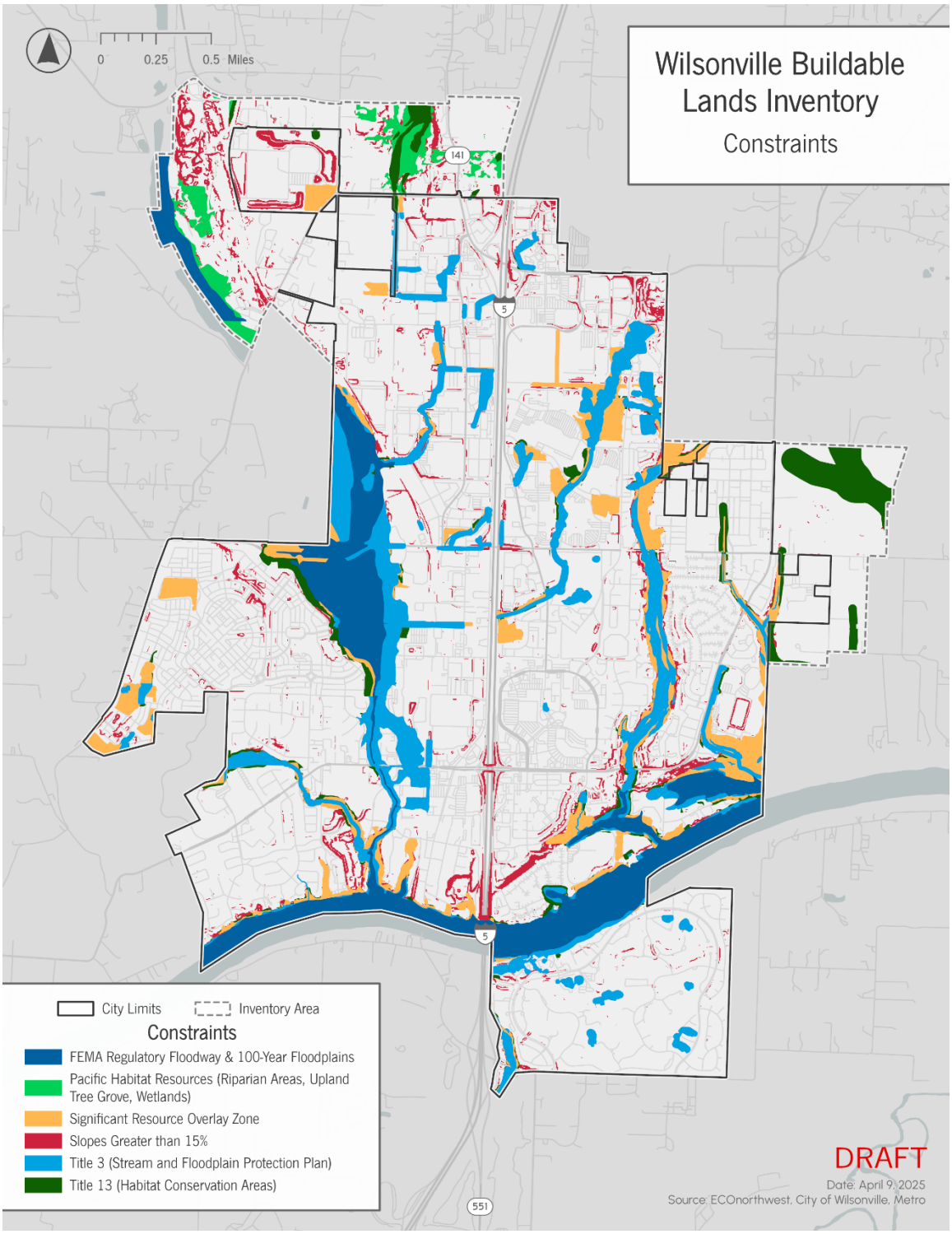
The BLI identifies the following conditions as constraints that prohibit development. These constraints are shown in Figure 1:

- FEMA 100-Year Floodplains and Regulatory Floodway
- High or very high landslide susceptibility
- Slopes greater than 15%
- Title 3 (Stream and Floodplain Protection Plan)
- Title 13 (Habitat Conservation Areas)
- Significant Resource Overlay Zone (SROZ)
- Natural Resource Areas (riparian areas, upload tree groves, or wetlands) identified by Pacific Habitat Services in the Basalt Creek area

Figure 2 shows buildable area status with constraints applied, resulting in buildable acres. Land classified as vacant or partially vacant and affected by these constraints is deemed unavailable for development and has been excluded from the inventory of buildable land.

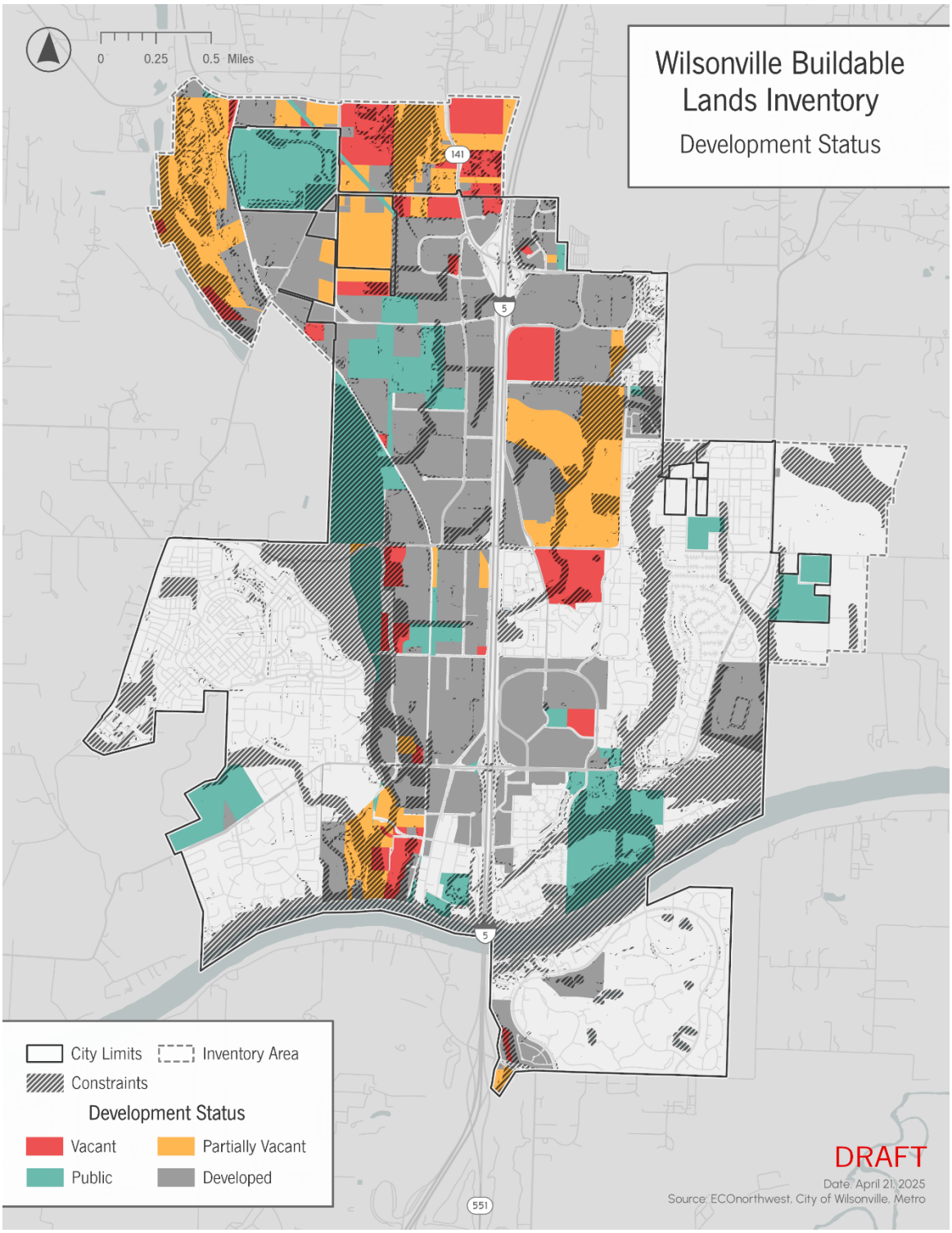
It is important to note that tax lots shown as partially vacant in the map do not distinguish the part of the tax lot that is unavailable for development. However, the buildable lands inventory database accounts for these distinctions.

Exhibit 34. Development Constraints, Wilsonville City limits and UGB area, 2025



Source: ECOnorthwest analysis, City of Wilsonville, Metro, Pacific Habitat Services, USGS

Exhibit 35. Buildable Area Status with Constraints, Wilsonville City limits and UGB area, 2025



Source: ECOnorthwest analysis, City of Wilsonville, Metro

Vacant Buildable Land

The next step in the BLI involved removing portions of vacant and partially vacant tax lots deemed unsuitable for development. Unsuitable areas fall into two categories:

1. Developed portions of partially vacant tax lots.
2. Areas affected by physical constraints (i.e., areas within wetlands, floodplains, steep slopes, etc.).

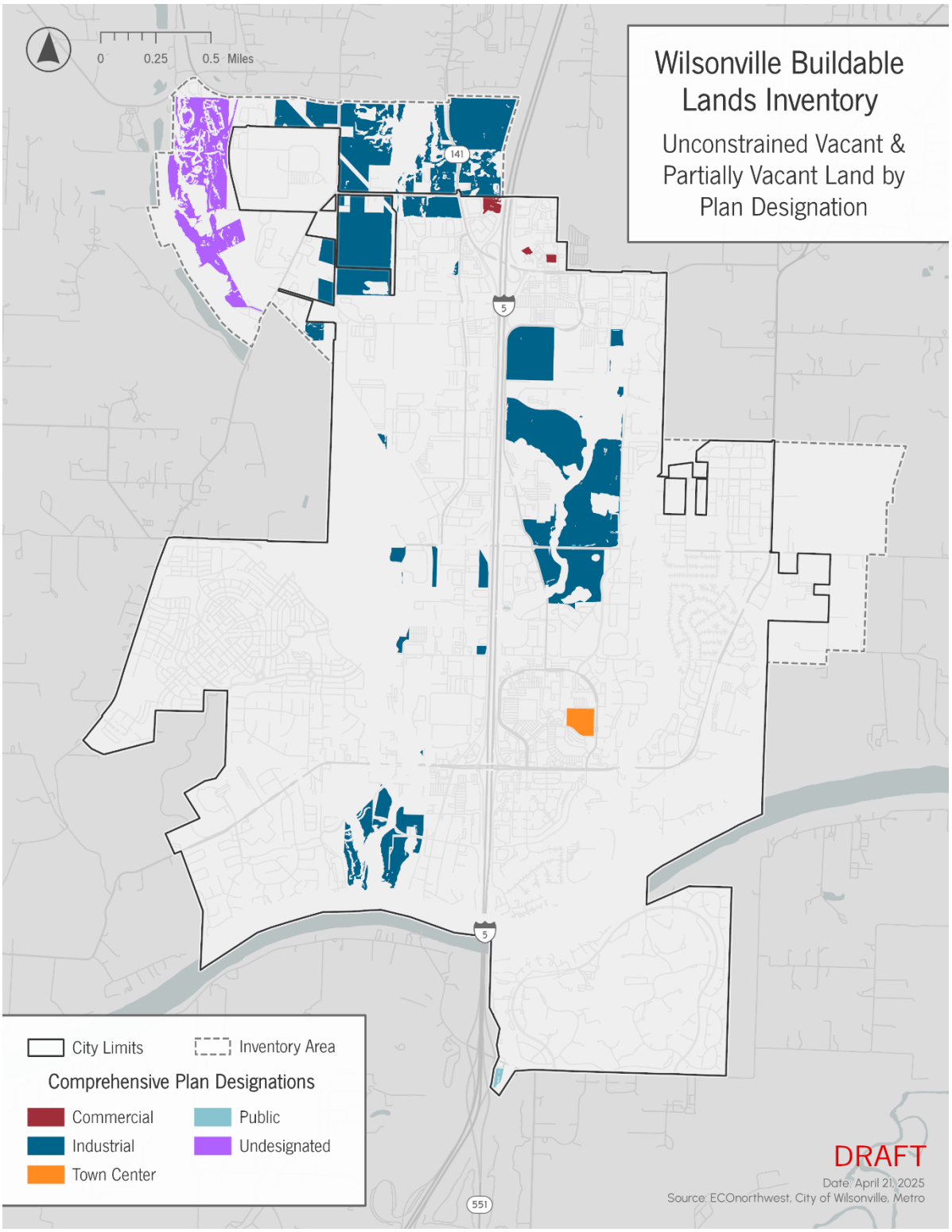
Exhibit 36 presents the total buildable acres by Comprehensive Plan designation after these constraints have been deducted. This includes both vacant and partially vacant lands in the Wilsonville City limits and UGB area. Figure 3 shows a map of the buildable commercial and industrial lands within the Wilsonville City limits and UGB area, also categorized by Comprehensive Plan designation. Overall, the Wilsonville City limits and UGB area contains 366 total buildable acres available for future development.

Exhibit 36. Buildable Acres in Vacant/Partially Vacant Tax Lots by Wilsonville Comprehensive Plan Designation, Wilsonville City limits and UGB area, 2025

Plan Designation	Total Buildable Acres	Buildable Acres on Vacant Lots	Buildable Acres on Partially Vacant Lots
Commercial	4	4	0.3
Industrial	308	178	130
Town Center	9	9	-
Undesignated	45	1	44
Total	**366**	**191**	**175**

Source: ECOnorthwest analysis, City of Wilsonville, Metro

Exhibit 37. Buildable Employment Land by Plan Designation, Wilsonville City limits and UGB area, 2025



Source: ECOnorthwest analysis, City of Wilsonville, Metro

Exhibit 38 shows the size of lots by plan designations for buildable employment land.

Exhibit 38. Acres of Land and Number of Tax Lots by Plan Designation, Buildable Acres, Wilsonville City limits and UGB area, 2025

Plan Designation	Buildable Sites Size						
	0 - 0.5 Acres	0.5 - 1 Acres	1 - 2 Acres	2 - 5 Acres	5 - 10 Acres	10 - 25 Acres	25 - 50 Acres
	Acres of Land by Plan Designation						
Commercial	0.3	1	-	3	-	-	-
Industrial	4	9	23	90	118	-	64
Town Center	-	-	2	-	7	-	-
Public	0.1	-	-	-	-	-	-
Undesignated	-	1	2	3	26	13	-
Acreage Total	**5**	**11**	**26**	**97**	**151**	**13**	**64**
	Number of Tax lots by Plan Designation						
Commercial	1	1	-	1	-	-	-
Industrial	16	12	15	28	16	-	2
Town Center	-	-	1	-	1	-	-
Public	1	-	-	-	-	-	-
Undesignated	-	2	1	1	3	1	-
Tax Lot Total	**18**	**15**	**17**	**30**	**20**	**1**	**2**

Source: ECOnorthwest analysis, City of Wilsonville, Metro

Short-term Land Supply

This section reviews Wilsonville's short-term supply of employment land within the context of state policy requirements.

Policy Context

The Goal 9 Administrative Rule (OAR 660-009) includes provisions that require certain cities to ensure an adequate short-term supply of industrial and other employment lands. OAR 660-009- 005(10) defines short term supply as follows:

> "...means suitable land that is ready for construction within one year of an application for a building permit or request for service extension. Engineering feasibility is sufficient to qualify land for the short-term supply of land. Funding availability is not required. "Competitive Short-term Supply" means the short-term supply of land provides a range of site sizes and locations to accommodate the market needs of a variety of industrial and other employment uses." ∂

The Goal 9 rule also requires cities in a Metropolitan Planning Organization (MPO, which includes Wilsonville) to make a commitment to provide a competitive short-term

supply of land and establishes targets for the short-term supply of land. Specifically, OAR 660-009-0020(1)(b) states:

> "Cities and counties within a Metropolitan Planning Organization must adopt a policy stating that a competitive short-term supply of land as a community economic development objective for the industrial and other employment uses selected through the economic opportunities analysis pursuant to OAR 660-009-0015."

The rule goes on to clarify short-term land supply targets for cities in an MPO (OAR 660-009- 0025):

> (3) Short-Term Supply of Land. Plans for cities and counties within a Metropolitan Planning Organization or cities and counties that adopt policies relating to the short-term supply of land must designate suitable land to respond to economic development opportunities as they arise. Cities and counties may maintain the short-term supply of land according to the strategies adopted pursuant to OAR 660-009-0020(2).
>
> (a) Except as provided for in subsections (b) and (c), cities and counties subject to this section must provide at least 25% of the total land supply within the urban growth boundary designated for industrial and other employment uses as short-term supply.
>
> (b) Affected cities and counties that are unable to achieve the target in subsection (a) above may set an alternative target based on their economic opportunities analysis. ECONorthwest Chapter 2: Buildable Lands Inventory 2–21
>
> (c) A planning area with 10 percent or more of the total land supply enrolled in Oregon's industrial site certification program pursuant to ORS 284.565 satisfies the requirements of this section.

In summary, the rule requires Wilsonville to assess the short-term supply of employment land based on the criteria that land can be ready for construction within one year. The determination is based on "engineering feasibility."

Analysis of Short-term Supply of Land

City of Wilsonville staff used the results of the buildable lands inventory to identify commercial and industrial sites that meet the definition of short-term supply. Short-term land supply includes all sites within Coffee Creek and all lands located south of SW Day Road and/or within City limits.

In Basalt Creek, the area along and immediately south of SW Day Road represents the primary corridor for near-term development. These properties are considered part of the short-term supply because of their access to existing utilities and proximity to City limits. Sites in the northern portion of Basalt Creek were excluded due to utility constraints that may take longer to address, meaning development could extend beyond one year from the time a building permit is submitted. The West Railroad area of Basalt Creek is not considered short-term.

Overall, Wilsonville has 13 acres of commercial land (across 7 sites) and 200 acres of industrial land (across 59 sites) in the short-term supply. In comparison to all unconstrained vacant and partially vacant commercial and industrial land (from **Exhibit 36**) 100% of Wilsonville's commercial land (including Town Center) is in the short-term supply and 57% of industrial land (including land identified as undesignated) is in the short-term supply.

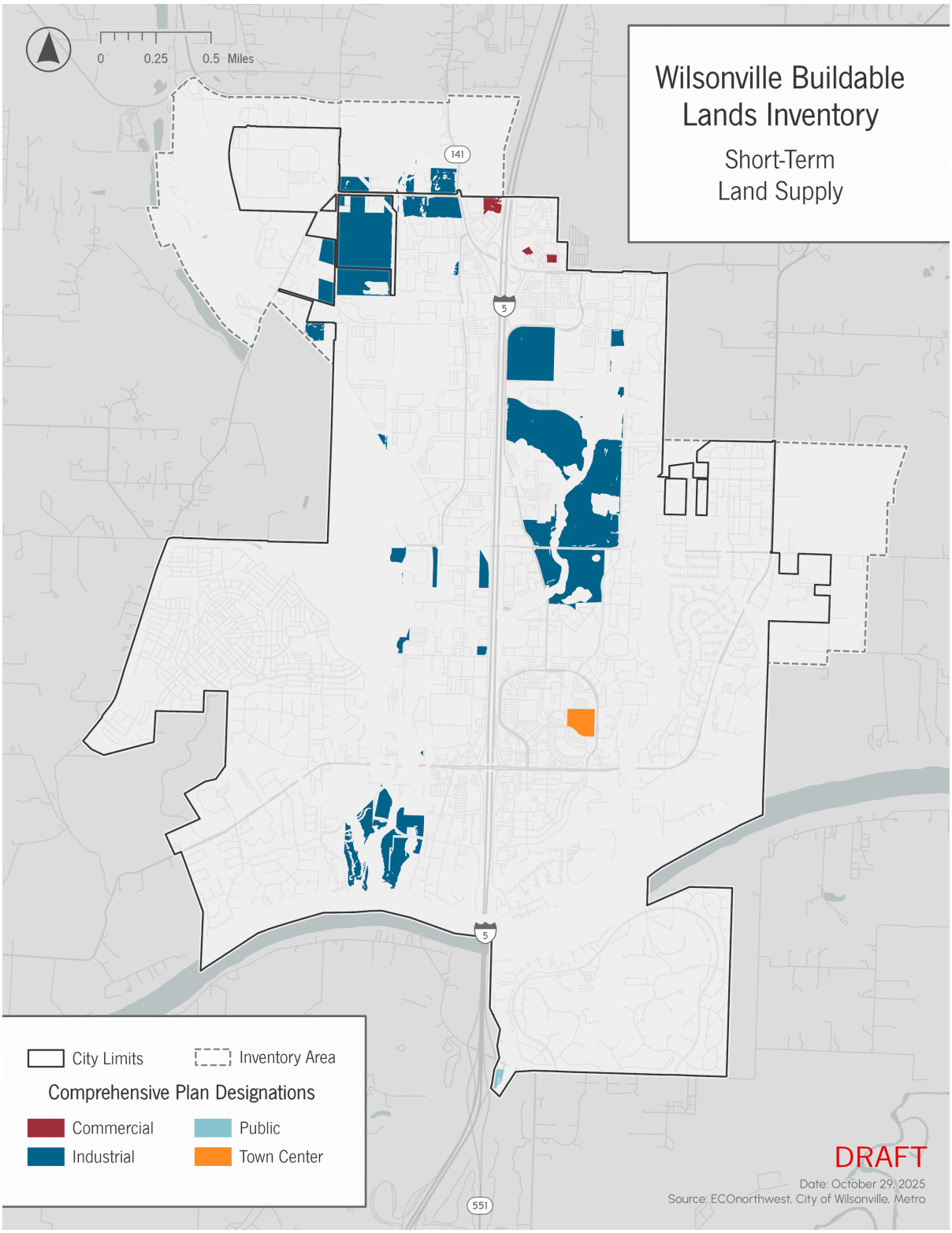
Exhibit 39 shows the short-term supply of employment land by plan designation. **Exhibit 40** shows a map of Wilsonville's short-term land supply.

Exhibit 39. Short-term Supply of Employment Land, Wilsonville City Limits and UGB Area, 2025

Plan Designation	Unconstrained Land		Short-Term Land Supply		
	Acres	Sites	Acres	Sites	Share of Unconstrained Acres
Commercial	**13**	**7**	**13**	**7**	**100%**
Commercial	4	5	4	5	100%
Town Center	9	2	9	2	100%
Industrial	**353**	**113**	**200**	**59**	**57%**
Industrial	308	98	200	59	65%
Undesignated	45	15	-	-	0%
Total	**366**	**120**	**213**	**66**	**58%**

Source: ECOnorthwest analysis, City of Wilsonville, Metro

Exhibit 40. Short-term Supply of Employment Land, Wilsonville City Limits and UGB Area, 2025



Source: ECOnorthwest analysis, City of Wilsonville, Metro

5. Land Sufficiency and Conclusions

This chapter presents conclusions about Wilsonville's employment land sufficiency for the 2026–2046 period, as well as recommendations for the City to consider for meeting its economic growth needs throughout the planning period.

Land Sufficiency

Exhibit 41 shows commercial and industrial land sufficiency within Wilsonville. It shows:

- **Vacant unconstrained land within Wilsonville's Planning Area**. This land is identified and discussed in detail in the Vacant Buildable Land section of this report. Using data from that section, **Exhibit 41** shows that Wilsonville has 353 gross acres of vacant industrial land and 13 gross acres of vacant commercial land available for development.
- **Demand for commercial and industrial land.** The Estimate of Demand for Commercial and Industrial Land section of this report describes the methodology used to identify demand. Based on assumptions described in that section, Wilsonville will need a total of 321 gross acres for industrial uses and 110 gross acres for commercial uses over the 2026-2046 period (**Exhibit 28**).
- **Land sufficiency.** When subtracting the demand for land from the supply of vacant unconstrained land, **Exhibit 41** shows that Wilsonville has:
  - A 32-acre surplus of industrial land, and
  - A 47-acre deficit of vacant unconstrained commercial land after accounting for near-term redevelopment and reuse opportunities.

  As described below, Wilsonville has several opportunities to increase the efficiency and intensity of development on existing commercial land, which will help meet the City's projected commercial land needs during the planning period.

Exhibit 41. Comparison of the Capacity of Unconstrained Vacant Land with Employment Land Demand by Land Use Type, Wilsonville, 2026-2046

Comprehensive Plan Designation	Land Supply (Gross Acres)	Land Demand (Gross Acres)	Redevelopment & Reuse Potential (Gross Acres)	Land Sufficiency (Gross Acres)
Industrial & Undesignated	353	321	N/A	32
Commercial & Town Center	13	110	50	(47)

Source: ECOnorthwest

Note: Redevelopment and reuse potential reflect known near-term opportunities in Town Center and reuse of large vacant sites such as the former Rite Aid, Albertsons, Regal Cinema, and Fry's Electronics properties. ECO did not model redevelopment of industrial sites, as the City has a surplus of industrial land within the planning period.

The target industries identified for Wilsonville include a mix of manufacturing, wholesale trade, and construction businesses, along with retail and commercial services that serve residents and employees (see *Potential Growth Industries*). Site needs for these industries range from space in existing buildings and redevelopment opportunities to large industrial sites of 25 acres or more for manufacturing and distribution (see *Site Needs for Potential Growth Industries*).

Exhibit 38 shows the following characteristics of Wilsonville's vacant, buildable employment land supply:

- **80 sites** smaller than 5 acres, including four in the commercial or Town Center designation and the remainder designated for industrial use
- **21 sites** ranging from 5 to 25 acres, with one in the Town Center designation and the rest industrial
- **2 industrial sites** between 25 and 50 acres, totaling 64 acres

Meeting future commercial land needs will depend primarily on redevelopment, particularly within Town Center. Based on this information and the analysis in **Exhibit 41**, Wilsonville has sufficient land to accommodate projected industrial growth but faces a limited supply of vacant commercial land. The City can address this gap through redevelopment, reuse of existing buildings, and targeted policy changes.

Town Center is a key redevelopment area, particularly for smaller, experience-based retail and food and beverage businesses. Several large vacant buildings, including the former Rite Aid, Albertsons, Regal Cinema, and Fry's Electronics, also offer opportunities for reuse to meet commercial needs. In addition, the City is evaluating whether certain industrial areas could support more commercial activity through zoning or policy adjustments.

Although Wilsonville has sufficient industrial land overall, much of it consists of small parcels under five acres. Assembling larger sites, either by the City or by the private sector will be important to meeting the needs of future industrial users and supporting long-term employment growth.

Conclusions

- **Wilsonville is forecasted to grow in both the commercial and industrial employment sectors.** Wilsonville is planning for growth of 6,132 new jobs in the City over the 2026 to 2046 period. About 2,642 of the jobs will be industrial, 2,690 of the jobs will be in office and commercial services, and 538 in retail. Growth of these jobs will result in demand for about 321 gross acres of industrial land and 110 gross acres of commercial land.
- **Wilsonville has a sufficient supply of industrial land to accommodate projected employment growth.** The City has approximately 353 acres of vacant, buildable industrial land compared with a forecasted demand of 321 acres, resulting in a small surplus of 32 acres.
- **Much of Wilsonville's industrial land is not development ready.** Most of the City's industrial supply is concentrated in the Coffee Creek and Basalt Creek planning areas. Coffee Creek benefits from an established Urban Renewal District that funds infrastructure improvements and enhances site readiness. In contrast, Basalt Creek faces similar challenges, including fragmented ownership, smaller parcel sizes, existing contractor establishments, and limited urban infrastructure such as water, sewer, and improved road access, but without the benefit of urban renewal. Wilsonville has about 80 vacant industrial sites that are smaller than five acres, totaling roughly 140 acres. Assembling larger, contiguous parcels and continuing infrastructure investment will be essential to unlocking Wilsonville's full industrial potential and supporting higher-intensity employment uses.
- **Wilsonville has limited vacant commercial land but strong redevelopment potential.** The City currently has about 13 acres of vacant, buildable commercial land compared to a forecasted need of 110 acres, creating a shortfall of about 97 acres. However, much of this future demand can be met through redevelopment and targeted policy adjustments. Town Center is the City's primary opportunity for new commercial and mixed-use growth, particularly for experience-based retail, food, and beverage businesses. Several large vacant buildings, including the former Albertsons, Rite Aid, Regal Cinema, and Fry's Electronics, offer near-term opportunities for reuse or redevelopment. Together, these known sites account for about 50 acres of redevelopment potential. The City is also exploring whether certain industrial

areas could accommodate commercial uses through zoning or policy updates. These strategies will be important for maintaining a balanced employment land supply and supporting Wilsonville's long-term economic growth.

- **Wilsonville's average wages are higher than the regional average.** Wilsonville's average annual wage is approximately $78,235 compared with $76,066 for the Portland region. The City's employment base includes a concentration of higher-wage sectors such as manufacturing, wholesale trade, and construction. This distinguishes Wilsonville from nearby communities, where average wages tend to be lower. Potential growth industries in Wilsonville generally provide above-average wages, with the exception of resident- and visitor-oriented services such as retail, food services, and accommodation.
- **Wilsonville's economic outlook is strong.** The City's opportune location along the I-5 corridor, access to regional labor markets, and industrial land supply provide a solid foundation for continued economic growth. Ongoing investment in site readiness, infrastructure, and redevelopment will be essential to maintaining Wilsonville's position as a leading employment center in the Portland metro region.

Relationship to the Economic Development Strategy

The EOA establishes the technical foundation for understanding Wilsonville's employment land capacity and economic growth potential. The accompanying Wilsonville EDS builds on these findings to identify how the City can act on them.

While the EOA evaluates land supply, site readiness, and industry trends, the EDS focuses on implementation. It translates these findings into goals, policies, and actions that address key challenges such as limited development-ready industrial land and the need for redevelopment in Town Center.

Together, the EOA and EDS provide a coordinated framework for guiding Wilsonville's economic growth. The EOA defines the City's land needs and economic opportunities, and the EDS outlines the steps necessary to achieve them through targeted investment, policy updates, and partnerships. The EDS is presented as a separate companion document.

Appendix A. National, State, and Local Economic Trends

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

National and State Trends

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

- **Slower labor force growth will be offset by increased productivity gains.** According to the Oregon Office of Economic Analysis (OEA), long-term economic growth is shaped by two primary factors: the number of workers and their productivity. Oregon's labor force growth is slowing due to persistently low birth rates and ongoing shifts in migration trends—factors that have led to downward revisions in the state's population growth outlook. OEA anticipates that economic growth will be increasingly driven by gains in productivity as employers adapt to a tight labor market.

  - Employment is still expected to grow, but at a slower pace than previously forecast. Total nonfarm employment is projected to grow at an average annual rate of 0.6% through 2034, down from higher rates seen in prior decades. Productivity, meanwhile, is expected to rebound, supported by rising capital investment and the adoption of technologies like generative artificial intelligence (AI). These forces are expected to help businesses operate more efficiently and maintain economic momentum despite a slower-growing workforce.[42]

- **Manufacturing remains vital to Oregon's economy but faces near-term employment declines.** Manufacturing accounts for a slightly larger share of employment in Oregon compared to the national average, with 9.9% of jobs in the sector versus 8.4% nationally. [43] Over the long term, Oregon's manufacturing sector has experienced stronger growth than the nation. Since

[42] Oregon Economic Analysis, Oregon Economic and Revenue Forecast, March 2025. Vol. XLV, No. 1. Release date February 2025, https://www.oregon.gov/das/oea/Documents/OEA-Forecast-0325.pdf

[43] Oregon Employment Department, Made in Oregon: A profile of the State's Manufacturing Sector, May 2024.

reaching its lowest employment level in 2010, manufacturing employment in Oregon increased by 15% through 2023, compared to 13% nationally.[44]

Despite this long-term growth, recent trends have been less favorable. While most of the jobs lost during the pandemic were recovered, manufacturing employment in Oregon remains below 2019 levels and declined throughout much of 2023. Since January 2019, Oregon's manufacturing employment has decreased by 6%, while national manufacturing employment has increased by 1%.[45] Rising costs, particularly in housing and taxes, coupled with recent policy shifts, may be outweighing Oregon's traditional quality-of-life benefits for manufacturers. The lack of development-ready land is also frequently cited as a primary obstacle for manufacturers looking to expand in or relocate to Oregon, potentially driving businesses to other states.[46]

These recent setbacks are notable given the state's historical strength in manufacturing and stand in contrast to national trends, where the sector has been more resilient. Although federal investments like the CHIPS Act may offer long-term opportunities, their impacts have yet to materialize in job growth.[47] Overall, Oregon's manufacturing sector continues to reflect a broader statewide shift toward increased productivity and capital investment, rather than labor-driven expansion. It remains an essential part of the economy, but its contribution to short-term job growth is likely to be limited.[48]

- **Rising trade tensions increase risks to Oregon's export-dependent economy.** Oregon's economy is particularly sensitive to changes in national trade policy due to its high reliance on exports and manufacturing, which together account for a significant share of the state's GDP.[49] Core export sectors, including semiconductors, machinery, transportation equipment, and agricultural products, are especially vulnerable to global market disruptions.

  The state's exposure is further heightened by the concentration of its exports. More than 50% are destined for just three countries: Mexico, China, and Canada.[50] This creates a heightened risk that disruptions with any one

[44] Oregon Employment Department, Made in Oregon: A profile of the State's Manufacturing Sector, May 2024.
[45] Oregon Employment Department, Made in Oregon: A profile of the State's Manufacturing Sector, May 2024.
[46] Oregon Business & Industry. *The Condition of Oregon's Manufacturing Sector*. October 2024. https://oregonbusinessindustry.com/wp-content/uploads/The-Condition-of-Oregons-Manufacturing-Sector_October-2024.pdf.
[47] Oregon Economic Analysis, Oregon Economic and Revenue Forecast, March 2025. Vol. XLV, No. 1. Release date February 2025, https://www.oregon.gov/das/oea/Documents/OEA-Forecast-0325.pdf
[48] Ibid
[49] Ibid
[50] Ibid

trading partner could have broad economic impacts. Recent tariff policies introduced by the Trump Administration in early 2025 have added to these concerns.

Oregon's elevated export share of GDP places the state in a vulnerable position should trade tensions escalate. Policymakers often reference the 2018–2019 trade war as a cautionary example. During that period, rising tariffs and retaliatory measures contributed to a 2.5 percentage point decline in state economic growth.[51] A similar slowdown remains a risk if current disputes continue to intensify.

- **Tighter immigration policies may constrain Oregon's labor supply in key industries.** Stricter immigration policies initiated by the Trump Administration are expected to reduce labor availability in several key sectors that rely heavily on foreign-born workers, including construction, agriculture, food processing, and hospitality. The Oregon Office of Economic Analysis notes that immigration policies will remain a critical variable shaping the state's labor market flexibility and long-term growth prospects. Given Oregon's reliance on net in-migration for workforce growth, federal immigration restrictions may exacerbate hiring challenges, limit productivity, and increase wage inflation in affected sectors.[52]
- **Increases in automation across sectors reshapes workforce demands.** Automation has been a long-running trend in employment, leading to productivity gains across sectors. Additionally, the enhancement of artificial intelligence (AI) is expanding automation possibilities beyond routine tasks to jobs previously thought impervious, such as office and cognitive roles. However, complete job replacement due to AI is expected to be minimal with task efficiencies and shifting tasks within jobs as more likely outcomes.[53,54] The U.S. Government Accountability Office (GAO) reports that automation could be widespread, with anywhere from 9% to 47% of jobs being automated in the future according to academic research.[55]

  The GAO identified that jobs requiring a blend of soft skills (management, interpersonal), process skills, and technical expertise face lower automation

[51] Oregon Economic Analysis, Oregon Economic and Revenue Forecast, March 2025. Vol. XLV, No. 1. Release date February 2025, https://www.oregon.gov/das/oea/Documents/OEA-Forecast-0325.pdf
[52] Ibid
[53] BLS, Growth Trends for Selected Occupations Considered at Risk from Automation, July 2023, https://www.bls.gov/opub/mlr/2023/article/growth-trends-for-selected-occupations-considered-at-risk-from-automation.htm
[54] Manhattan Strategy Group, Job Automation Risk and the Future of Skills: Skills and Competency Change in the U.S. Workforce, May 2023, https://www.dol.gov/sites/dolgov/files/OASP/evaluation/pdf/FutureofSkillsLitScan-20230515.pdf
[55] Government Accountability Office, Workforce Automation, August 2023, https://www.gao.gov/assets/gao-22-105159.pdf

risks. Most of the top 20 in-demand jobs share this mixed skill set trait, including nurse practitioners, statisticians, occupational therapy assistants, home health aides, physical therapist assistants, medical managers, physician assistants, information security analysts, and data scientists, among others.[56] Lower-wage jobs are the most likely to be automated. The GAO reported that over 80% of jobs paying less than $20 per hour are susceptible to automation over the next two decades. About 30% of jobs paying $20 to $40 per hour and 4% of jobs paying $40 or more per hour were also identified as at risk.[57]

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

- **Shifts in the national commercial and industrial real estate markets:** Following the COVID-19 pandemic, commercial and industrial real estate markets continue to face challenging development conditions. The increased cost of capital has made many projects economically infeasible, especially speculative projects that rely on debt financing and those with longer loan payback periods.[58] Higher interest rates have also reduced property valuations, complicating the ability of developers to secure construction financing and attract equity investments.[59] Additionally, rising construction costs—driven by inflation and supply chain disruptions—have further complicated development efforts across these sectors.
  - **Demand for office space remains soft.** The U.S. office market is in decline, driven largely by the shift to remote and hybrid work. The share of employees working from home rose from 24% in 2019 to 33% in 2024.[60] This trend has contributed to ten consecutive quarters of negative net absorption and a national reduction of 18.2 million square feet in occupied office space.[61] Office construction has slowed substantially with the development pipeline down 67% since early 2020.[62] While high-quality office spaces in prime locations continue to

[56] Government Accountability Office, Workforce Automation, August 2023.
[57] Executive Office of the President. (2016). Artificial Intelligence, Automation, and the Economy.
[58] If developers take on debt to finance a project, the longer they take to repay the loan, the more interest will accrue.
[59] In addition to loans, developers will typically finance projects in part with equity investments, in which investors become shareholders in the project.
[60] BLS, American Time Use Survey, 2025; does not differentiate between part- and full-time workers
[61] Cushman & Wakefield, U.S. Office Marketbeat Q2 2024
[62] Ibid

attract tenants, older and mid-tier properties face uncertainty, with some being repurposed.

The office sector continues to recalibrate to hybrid work with attendance stabilizing in the 60-70% range on peak attendance days, setting a new baseline for space requirements. Cushman & Wakefield projects that overall occupancy will begin to stabilize in late 2025 as demand gradually returns, supported by headcount growth and new business formation.[63] Investment interest in traditional office properties remains weak, though medical office space shows strong prospects.[64]

- **Demand for retail space remains stable:** The U.S. retail market ended 2024 on a strong note, with 1.4 million square feet of net absorption in Q4 (the highest quarterly total of the year) and a steady shopping center vacancy rate of 5.4%. While total annual absorption declined substantially from 2023, and store closures reached their highest level since 2020, retail fundamentals remain resilient. Limited new construction and solid consumer spending have helped keep vacancy rates and rents stable. Looking ahead, retail growth is expected to continue at a slower, more strategic pace, with demand increasingly concentrated among top-performing brands.[65]
- **Strong and sustained demand for industrial space.** The industrial real estate market experienced strong growth over the past decade, with investment prospects improving significantly between 2014 and 2021. Historically, fulfillment and warehouse space have been the most attractive investment options, outperforming research and development, manufacturing, and flex space. However, in recent years, these distinctions have blurred, with all industrial subtypes now holding similar investment ratings just below "good."[66]

  While the market remained strong in 2022 and 2023, 2024 has seen signs of a slowdown. Vacancy rates have risen to 6.1% but remain below historical averages, with a peak of 6.7% expected in early 2025 before declining.[67] Despite slowing, rent growth continues at 3.7% year-over-year.[68] An increase in new supply (1.2 billion square feet in 2022-2023) has contributed to rising vacancies, but construction has since dropped 46%, tightening future inventory.[69] Looking ahead, the sector is expected

[63] Cushman & Wakefield, U.S. Office Marketbeat Q2 2024
[64] Urban Land Institute 2024 Emerging Trends in Real Estate, United States and Canada
[65] Cushman & Wakefield Q4 2024 U.S. Retail MarketBeat report
[66] Urban Land Institute 2024 Emerging Trends in Real Estate, United States and Canada
[67] Cushman & Wakefield, Industrial Marketbeat Q2 2024 U.S. National Industrial Report
[68] Ibid
[69] Ibid

to stabilize, with sustained demand driven by reshoring, e-commerce, and evolving supply chain strategies.[70] The impact of recent trade policies and tariffs on industrial real estate demand remains uncertain, as they can both stimulate reshoring and new investment while also increasing costs and risking business contraction.

- **The aging of the baby boomer generation and the need for replacement workers.** As the baby boomer generation continues to retire, the number of Social Security recipients is expected to increase from over 65 million in 2023 to over 86 million in 2045, a 32% increase. In 2023, there were 36 Social Security beneficiaries per 100 covered workers, but by 2045, there is expected to be 45 beneficiaries per 100 covered workers. This will increase the percent of the federal budget dedicated to Social Security and Medicare.[71]

  While the Bureau of Labor Statistics projects total U.S. employment to grow by 4.7 million jobs from 2023 to 2032, this job growth is unlikely to be sufficient to replace all the baby boomer retirees leaving the workforce during that period. The BLS estimates there will be 18.6 million annual job openings arising from the need to replace retiring workers and workers changing occupations, in addition to openings from newly created positions.[72] The sectors expected to grow the fastest are healthcare support, computer and mathematical occupations, healthcare practitioners, and community and social service.[73]

- **Growth of entrepreneurship and small businesses.** The creation of new businesses plays a vital role in driving Oregon's economic growth. Start-ups generate employment opportunities, introduce innovative products and services, and help better serve local communities. According to the 2023 Small Business Profile from the U.S. Small Business Administration Office of Advocacy, small businesses (defined as having between zero and 500 employees) account for 99.9% of total businesses in the United States and employ 46% of the American workforce. Oregon's performance in early-stage

[70] JLL, Q1 2024 Industrial Outlook
[71] The Board of Trustees, Federal Old-Age and Survivors Insurance and Federal Disability Insurance Trust Funds, 2023 https://www.ssa.gov/oact/TR/2023/tr2023.pdf
[72] Bureau of Labor Force Occupational Separations and Openings, 2023-2032 https://www.bls.gov/emp/tables/occupational-separations-and-openings.htm
[73] Bureau of Labor Statistics Employment Projections – 2023-2032, September 2023 https://www.bls.gov/news.release/pdf/ecopro.pdf

entrepreneurship activity, as measured by the Kauffman Early-Stage Entrepreneurship (KESE) Index, ranked 25th in the country in 2020. [74,75]

Start-up activity had been trending down for decades in Oregon and across the nation leading up to the pandemic, but since the pandemic, new business formation has increased and appears to be maintaining this higher rate.[76] In terms of outlook for start-ups, several key factors are at play. High inflation, rising interest rates, and recession risks, along with tighter venture capital and banking lending conditions, will likely slow new business formation. However, several favorable factors could mitigate these impacts and support continued strength in entrepreneurship and small business formation in Oregon. These include increased personal savings and home equity levels, which are common funding sources for new businesses, along with the shift toward remote work opportunities and the large millennial generation entering their prime entrepreneurial years (late 30s and early 40s, according to Census Bureau research).[77]

- **Continued transformation of retail.** In the last two decades, retail sales by e-commerce and warehouse clubs/supercenters (a lower-cost model to the traditional department store) have increased steadily. Online retail purchases increased from about 6% of all retail purchases in 2014 to about 16% of retail purchases in 2023.[78] Ultimately, the growth in online shopping and the increasing dominance of large supercenters has made it difficult for small and medium-sized retail firms (offering a narrower selection of goods) to compete. Declining net profits and increased competitive pressures have led many well-known retailers (e.g., JCPenney, Macy's, Sears) to declare bankruptcy or to scale back their operations.

  In the future, the importance of e-commerce will likely continue to grow. However, despite the highly publicized closures of brick-and-mortar stores, physical retail is likely to remain an important part of the retail sector as well. Since modern consumers are increasingly price sensitive, less brand loyal, and (since the advent of internet) able to substitute between retailers

[74] Kauffman Foundation. *Kauffman Indicators of Entrepreneurship*. Early-Stage Entrepreneurship. The Kauffman Index, Oregon. https://indicators.kauffman.org/.
[75] This index comprises four statistics: the rate of new entrepreneurs, the opportunity share of new entrepreneurs, start-up density, and start-up early survival rate.
[76] Josh Lehner. "Strong Startup Activity Continues" Oregon Office of Economic Analysis, May 3, 2023. Retrieved from https://oregoneconomicanalysis.com/2023/05/03/strong-start-up-activity-continues/
[77] Josh Lehner. "Strong Startup Activity Continues" Oregon Office of Economic Analysis, May 3, 2023. Retrieved from https://oregoneconomicanalysis.com/2023/05/03/strong-start-up-activity-continues/
[78] U.S. Census Bureau News, Quarterly Retail E-Commerce Sales, 4th Quarter 2023 https://www.census.gov/retail/mrts/www/data/pdf/ec_current.pdf

easily, retailers must be nimble and able to adjust to the changing needs of their customers if they are to remain competitive.

The types of brick-and-mortar retail and related services that are likely to remain viable are those offering goods that consumers prefer to purchase in person or goods that are difficult to ship and return, such as large furniture items. Additionally, retailers specializing in groceries, personal goods that are needed immediately, restaurants, and experiential offerings like entertainment or social activities are expected to maintain their presence. According to the Urban Land Institute, large retailers such as Macy's, Nordstrom, Kohl's, and Ikea are experimenting with downsizing storefronts to operate spaces that can be flexible to changing consumer needs. These locally scaled shops feature in-person merchandise and services that are in demand for modern consumers: curated inventory, tailored services, and e-commerce fulfillment.[79]

- **Changing places where work is being done.** The COVID-19 pandemic accelerated the shift to remote work, with the share of employees working from home increasing from 24% in 2019 to 33% in 2024, according to the Bureau of Labor Statistics' American Time Use Survey.[80] However, the ability to work remotely is not equally distributed. Those most likely to have remote work opportunities tend to have higher educational attainment, be white or Asian, and be over 25 years old.[81] This uneven access to remote work raises equity concerns, as certain demographic groups may be disadvantaged in accessing these flexible work arrangements.

  Remote work trends have consequences for downtown health and recovery. OEA found that downtown recoveries are not driven by regional economic changes but rather are impacted by the strength of three components: workers, residents, and visitors.[82] If a significant portion of previous downtown workers are now working remotely from other locations, downtowns need to capture or bolster resident and visitor spending to counteract this shift.

  In 2025, major employers like Amazon, Dell, Walmart, and federal agencies have issued full-time return-to-office (RTO) mandates to justify office costs, boost perceived productivity, and reassert control—often in response to stock

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

[80] BLS, American Time Use Survey, 2025; does not differentiate between part- and full-time workers

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

[82] Oregon Office of Economic Analysis, Downtown Recoveries 2023 Update, https://oregoneconomicanalysis.com/2023/07/18/downtown-recoveries-2023-update/

declines. Yet remote work remains far more common than before the pandemic, with over one in four U.S. workdays in 2024 done from home, up from one in fourteen pre-pandemic. Remote job postings are down, but demand remains high: just 20% of LinkedIn listings are remote or hybrid, yet they attract 60% of applications. While the current labor market favors employers, experts expect that retirements and an aging workforce will tighten labor supply, prompting a renewed need for flexibility. Smaller firms are already using remote options to attract talent, pointing to a future where workplace flexibility is a competitive necessity.[83]

- **Continued increase in demand for energy even as the sources supplying that energy shifts.** The 2023 Inflation Reduction Act aimed to drive increased investments in climate and energy projects across the United States.[84] As a result of the renewable energy investments and subsidies, the nation's energy consumption pattern is anticipated to undergo a shift over the coming years. There is an expected move away from traditional fossil fuels like crude oil and natural gas toward renewable energy sources.[85]

  However, this shift is not expected to reduce overall energy consumption. From 2023 to 2050, the U.S. Energy Information Administration (EIA) estimates that total energy consumption will rise due to population growth and economic expansion outpacing efficiency gains. This increasing demand is anticipated to be driven primarily by the industrial sector and, to a lesser extent, transportation.

- **Impact of rising energy prices on commuting patterns.** As energy prices increase over the planning period, transportation energy consumption is expected to shift to electric or fuel-efficient vehicles.[86] The share of electric vehicles is expected to grow from less than 6% in 2023 to 19% in 2050.[87] The Energy Information Administration estimates an 8% increase in transportation energy consumption, partially attributable to increasing vehicle miles traveled (VMT) that offset efficiency upgrades. With expected increases in fuel economy, people may commute farther while consuming less energy. VMT for passenger vehicles is forecasted to increase between 12% and 33% through 2050. Lower-income households may face financial

[83] Jennifer Liu, "5 Years into the Remote Work Boom, the Return-to-Office Push Is Stronger than Ever—Here's Why," *CNBC*, March 23, 2025. https://www.cnbc.com/2025/03/23/5-years-into-the-remote-work-boom-the-return-to-office-push-is-stronger-than-everheres-why.html.

[84] Energy Information Administration, Inflation Reduction Act of 2023

[85] Energy Information Administration, Inflation Reduction Act of 2023

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

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

barriers to efficiency upgrades and tend to have longer commutes, which may force them to face the brunt of rising energy prices.

- **High rates of inflation.** For the last several decades, inflation rates have generally stayed below 3% in the United States. Inflation started to increase in 2021, reaching 9.1% in June 2022 year-over-year, the largest annual increase in about 40 years.[88] In December 2024 the annual inflation rate was 2.9%, a marked reduction from the 2022 inflation rate.[89] Continued high rates of inflation may slow economic growth, further erode purchasing power, discourage savings, and lead to a national recession. Recent tariff policies and trade tensions may lead to new increases in inflation in 2025 and beyond.
- **Income gains in Oregon.** Oregon's economic growth in the past decade has led to improvements in the state's income and wage levels relative to the rest of the nation. Notably, Oregon's median household income has surpassed the national level for the first time in over 50 years.[90] Higher incomes can have positive impacts on an economy through improved standards of living and higher consumer spending, increased tax revenue potential, and talent attraction and retention, among others.
- **Potential impacts of global climate change**. Oregon and the Pacific Northwest have been experiencing the impacts of global climate change over the past 30 years, exacerbated by extreme events such as the 2020 Labor Day fires that burned over 840,000 acres in Oregon and the June 2021 heat dome that caused temperatures to soar to 111°F in Eugene and 116°F in Portland.[91] According to the National Oceanic and Atmospheric Administration (NOAA), between 1980 and 2023, the U.S. experienced an average of 8.5 weather-related disasters per year where overall damages/costs reached or exceeded $1 billion (adjusted for inflation). However, the number of such events has increased in the last five years, with an average of 20.4 events per year.[92] The Pacific Northwest is not only experiencing an increased frequency and severity of extreme weather events but also long-term climatic changes. These long-term changes include:

[88] Bureau of Labor Statistics, U.S. Department of Labor, *The Economics Daily*, Consumer prices up 9.1% over the year ended June 2023, largest increase in 40 years at https://www.bls.gov/opub/ted/2023/consumer-prices-up-9-1-percent-over-the-year-ended-june-2023-largest-increase-in-40-years.htm (visited *July 25, 2023*).
[89] Bureau of Labor Statistics, U.S. Department of Labor, *The Economics Daily*, Consumer Price Index: 2024 in Review, https://www.bls.gov/opub/ted/2025/consumer-price-index-2024-in-review.htm
[90] Oregon Economic Analysis, Oregon Economic and Revenue Forecast, March 2024. Vol. XLIV, No. 1.
[91] https://www.ncei.noaa.gov/access/monitoring/monthly-report/national/202106/supplemental/page-6.
[92] https://www.ncei.noaa.gov/access/billions/#:~:text=Menu-,Overview,376%20events%20exceeds%20%242.655%20trillion.

- **Increased average annual day and nighttime temperatures.** If greenhouse gas (GHG) emissions continue at the current rate, temperatures in Oregon are projected to rise approximately 5°F by the 2050s and 8.2°F by the 2080s.[93] These higher overall temperatures can have consequences, including increased mortality rates, the spread of diseases, and the forced migration of plants and animals as ecosystems undergo changes. Vegetation may become stressed and die, leading to an accumulation of fuel loads that heighten the risk of wildfires. Some areas that were once forestlands are transitioning into shrublands after being affected by forest fires.
- **Reduced snowpack and increased drought conditions.** As temperatures increase, snowpack is anticipated to decrease, reducing stream levels and water availability in the summer months.[94] Drought conditions can reduce surface water availability, reduce hydropower generation, and reduce recreational activities.[95]
- **Increased risk of high heat events.** Climate change increases the likelihood of experiencing high heat events like the June 2021 extreme heat wave that resulted in temperatures ranging from 110°F to 120°F in Oregon and Washington. This heat event caused approximately 159 deaths in Washington and more than 100 deaths in Oregon.[96,97]
- **Increased risk of wildfire.** Changing precipitation patterns and drought conditions are increasing fuel loads in wildland areas, increasing the risk of wildfires throughout the Pacific Northwest. Wildfire intensity, duration, and size have increased.
- **More days of poor air quality from wildfire smoke.** In 2021, people in Deschutes County, Klamath County, and Jackson County experienced 83

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

[94] WASHINGTON Assessment work. TBD.

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

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

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

days of air quality at or above unhealthy levels for sensitive groups due to wildfire smoke.[98]

- **More floods and atmospheric rivers.** The University of Washington's Climate Impact Group forecasts that the Pacific Northwest will experience slightly more precipitation in the fall, winter, and spring and less in the summer.[99] Extreme precipitation events are more likely to produce flooding, erosion, and landslides. These changes can threaten salmon and other species. Adaptation to extreme events could require expensive upgrades to stormwater systems.

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

- **Agriculture.** Climate change impacts the quality and quantity of agricultural products. For example, exposure to cold weather during dormancy is important for fruit set and quality in many perennial crops. Exposure to cold weather may increase in northern areas of the Pacific Northwest and decrease in southern areas.[100] A study by the Washington State Department of Agriculture found that a drought in 2015 caused $633 to $773 million in agricultural losses.[101] Drought and shifting precipitation patterns represent major threats, as drought reduces feed on rangelands for livestock and decreases water available for irrigation.
- **Aquatic/Fishing.** Marine heat waves impact fresh and saltwater habitats and species. In 2021, algal blooms exacerbated by increased temperatures resulted in a $641.1 million (in 2023 dollars) loss of

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

[99] https://express.adobe.com/page/C5CQaxjHUmGQ7/

[100] Noorazar, H., L. Kalcsits, V.P. Jones, M.S. Jones, and K. Rajagopalan, 2023: Climate change and chill accumulation: Implications for tree fruit production in cold-winter regions. *Climatic Change,* **171** (3), 34. https://doi.org/10.1007/s10584-022-03339-6

[101] Raymond, C.L, T.P. Nadreau, M. Rogers, Z. Kearl. 2023. Biophysical Climate Risks and Economic Impacts for Washington State. Report prepared for the Washington State legislature. Climate Impacts Group, University of Washington, Seattle.

commercial fishing revenue.[102] Tribes are often disproportionately impacted, accounting for half of fishery loss requests and experiencing losses from Dungeness crab fisheries. [103,104]

- **Forestry.** Forest plants and animals vulnerable to temperature and drought stresses are undergoing climate-induced die-offs. Five fir species in Oregon, Washington, and Northern California are experiencing severe mortality dubbed "Firmageddon."[105] Species at the edges of their ranges are expected to succumb first and may shift to higher elevations or northward. Die-offs include Douglas fir, a primary commercial timber species. Die-offs and stressed trees face higher risks of pest infestations and increase the risk of wildfires.
- **Human health.** With many Pacific Northwest households lacking air conditioning, higher summer temperatures and extreme heat events endanger vulnerable groups like older adults, low-income residents, those with disabilities, and individuals living alone who face heightened risks of heat stroke and death.
- **Tourism, Recreation, and Service Industries.** The Northwest tourism and recreation industry employs about 588,000 people and supports almost $60 billion (in 2023 dollars) in annual expenditures.[106] Climate impacts will vary as decreased snowpack will make trails and camping accessible later in the fall and earlier in the spring, but increased extreme events from atmospheric rivers may increase maintenance costs due to flooding and erosion. Higher temperatures will increase demand for water-based recreation; however, droughts may decrease lake, reservoir, and river levels during peak recreation season.

---

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

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

[104] Schlinger, C., O. Conroy-Ben, C. Cooley, N. Cooley, M. Cruz, D. Dotson, J. Doyle, M.J. Eggers, P. Hardison, M. Hatch, C. Hogue, K. Jacobson Hedin, C. Jones, K. Lanphier, D. Marks-Marino, D. Mosley, F. Olsen Jr., and M. Peacock, 2021: Ch. 4.2. Water. In: *Status of Tribes and Climate Change Report.* Marks-Marino, D., Ed. Institute for Tribal Environmental Professionals, Flagstaff, AZ, 98–141. http://nau.edu/stacc2021

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

[106] Mojica, J., K. Cousins, and T. Madsen, 2021: Economic Analysis of Outdoor Recreation in Oregon. Earth Economics, Tacoma, WA. https://static1.squarespace.com/static/561dcdc6e4b039470e9afc00/t/5ffe3084ce56a6552b7a3c71/1610494115376/EconomicAnalysisofOutdoorRecreationinOregon_OTC-EarthEconomics_SmallRes.pdf

- **Infrastructure.** Water, sewer, roads, utilities, and other infrastructure face risks if not designed to withstand climate change and extreme events. During the June 2021 heat dome, roads buckled near Everett, Washington, and a Portland streetcar cable melted.[107] Damaged power lines can lead to wildfires (a problem utility companies have started to mitigate by preemptively shutting down power when windy and dry conditions occur).[108] Rural communities relying on single water sources may be in jeopardy as droughts reduce groundwater aquifers or surface water availability. Sea level rise and flooding also threaten septic wastewater treatment systems. Atmospheric rivers and flooding can damage highways and streets through inundation and landslides, temporarily halting travel access to jobs, schools, healthcare, grocery stores, etc., necessitating expensive repairs and long detours. Additionally, the Pacific Northwest's hydropower dependency means the region may see fluctuations in electricity availability and costs as altered snowpack and precipitation patterns make the water supply less predictable.

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

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

Regional and Local Trends

Throughout this section, Wilsonville is compared to the Portland region and the State of Oregon. These comparisons are meant to provide context for changes in Wilsonville's socioeconomic characteristics. Additionally, information based on the 2019-2023 ACS is described as 2023 to enhance readability.

Availability of Labor

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

POPULATION CHANGE

Population growth in Oregon tends to follow economic cycles. Oregon's population grew from 3.4 million people in 2000 to 4.3 million people in 2023, an increase of 830,000 people or 0.9% each year. Between 2000 and 2023, Wilsonville's population increased by 12,457 people at an average annual rate of 2.8% (**Exhibit 42**), exceeding both the Portland region's and Oregon's growth rates during the same time (1.0% and 0.9%, respectively).

Exhibit 42. Population Growth, Wilsonville, Portland Region, and Oregon, 2000–2023

	Population			Change, 2000 - 2023		
	2000	2010	2023	Number	Percent	AAGR*
Wilsonville	14,365	18,095	26,822	12,457	87%	2.8%
Portland Region	1,444,219	1,644,535	1,830,731	386,512	27%	1.0%
Oregon	3,421,399	3,831,074	4,250,027	828,628	24%	0.9%

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

AGE DISTRIBUTION

The number of people ages 65 and older in the United States is projected to increase from 58 million in 2023 to 82 million by 2050 (a 47% increase).[109] The economic effects of this demographic change include a slowdown of labor force growth, the need for workers to replace retirees, an aging workforce as seniors continue working after

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

age 65, an increased demand for healthcare services, and a larger portion of the federal budget dedicated to Social Security and Medicare.[110]

Exhibit 43 through **Exhibit 46** show the following trends:

- Wilsonville has a higher proportion of residents aged 20 – 39 compared to the Portland region and the state. While Wilsonville is growing across all age groups 5 years and older, the older age groups are experiencing much faster growth. This growth rate and the 2.5-year increase in median age between 2000 and 2023 suggests that Wilsonville is attracting or retaining older adults.
- Clackamas County's population is aging, with the population aged 60 and over projected to increase from 27% in 2024 to 30% in 2044. Clackamas County may continue to attract those in their late adult years (i.e., 60 years and older) over the planning period. While the share of retirees in these respective areas may increase over the next 20 years, the share of youth (i.e., under 20 years old) or people in their early adult lives (i.e., 20 to 39 years old) is likely to decrease. While this demographic shift can provide a valuable source of skilled labor and experienced mentorship for younger generations entering the workforce, it also raises concerns about a potential labor shortage as a significant portion of the workforce approaches retirement age.

Wilsonville saw an increase in median age between 2010 and 2023.

Wilsonville's median age was 38.7 in 2023, 1.4 years younger than the median age in Oregon and 3.4 years younger than the median age in Clackamas County

Exhibit 43. Median Age, Wilsonville, Clackamas County, Washington County and Oregon, 2010 to 2019–2023

2010	36.2 Wilsonville	40.6 Clackamas County	38.4 Oregon
2023	38.7 Wilsonville	42.1 Clackamas County	40.1 Oregon

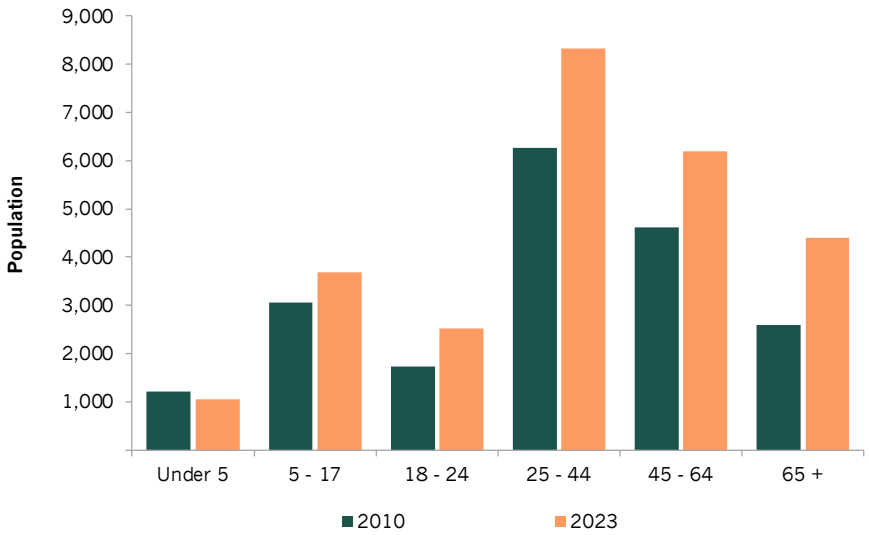
Source: U.S. Census Bureau, 2010 Decennial Census, Table P12; American Community Survey 2019–2023 5-Year Estimates, Table B01002.

[110] The Board of Trustees, Federal Old-Age and Survivors Insurance and Federal Disability Insurance Trust Funds, 2023. The Budget and Economic Outlook: Fiscal Years 2024 to 2034, February 2024.

Wilsonville saw substantial growth across all age groups between 2010 and 2023 except for children under 5.

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

Exhibit 44. Wilsonville Population Change by Age Group, 2010 to 2019–2023



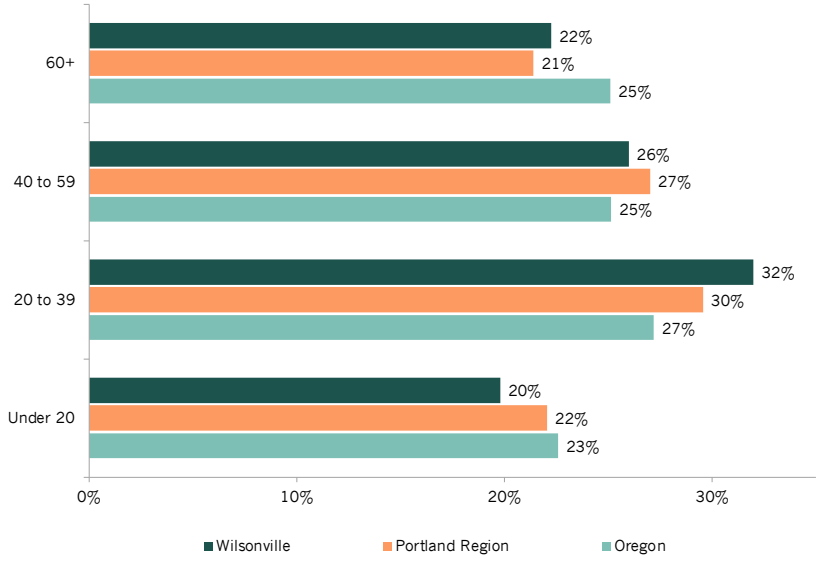
Source: U.S. Census Bureau, 2010 Summary File P12; American Community Survey 2019-2023 5-Year Estimates, Table B01001.

Nearly one-third of Wilsonville residents were between 20 and 39 years of age.

The proportion of Wilsonville's younger adults was higher than that of both the state and the Portland region.

Conversely, the proportion of Wilsonville residents under 20 years of age was lower relative to the Portland region and Oregon.

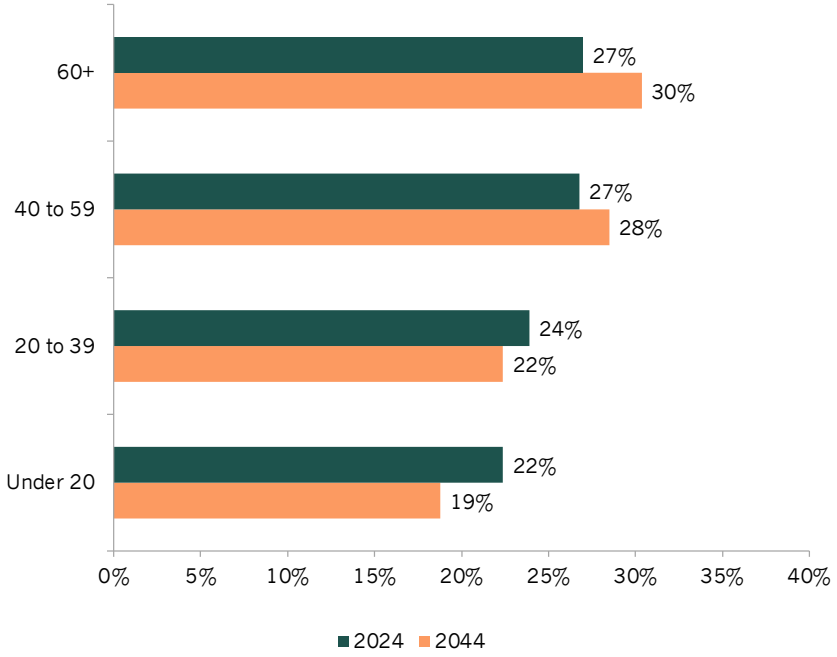
Exhibit 45. Population Distribution by Age, Wilsonville, Portland Region, and Oregon, 2019–2023



Source: U.S. Census Bureau, American Community Survey, 2019–2023 5-Year Estimates, Table B01001.

By 2044, Clackamas County residents age 40 and older will make up 58% of the county's total population, a 4% increase in share from 2024.

Exhibit 46. Population Share by Age Group, Clackamas County, 2024–2044



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

RACE AND ETHNICITY

Wilsonville is becoming more racially and ethnically diverse. From 2000 to 2023, the share of the Hispanic/Latino population in Wilsonville grew from 12% to 16% of the total population, and the share of people of color increased from 15% to 25%. In the Portland region, the share of the Hispanic/Latino population rose from 12% to 14% of the total population, while the share of people of color grew from 21% to 29%.

Statewide, Hispanic and Latino Oregonians have employment rates that are average or slightly above average compared to the overall population in recent decades. However, their higher employment rates are primarily concentrated in low- and middle-wage occupations such as agriculture, building maintenance, production, construction, food preparation, and transportation and material moving.[111] Providing culturally specific services, particularly for Spanish speakers, can help improve workforce participation and economic contribution from these growing demographic groups. Such services may also facilitate the entry of Hispanic and Latino workers into higher-wage industries, enabling greater economic opportunities for these communities (if they wish to pursue them).

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

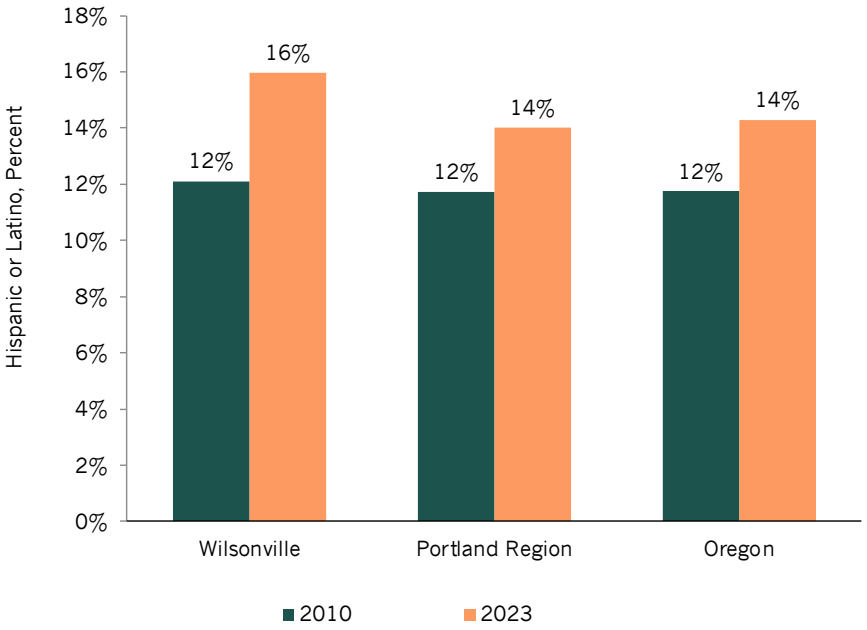
Exhibit 47 and **Exhibit 48** show the change in the share of Hispanic and Latino and people of color in Wilsonville compared to the Portland region and Oregon between 2010 and 2023. The group with the largest share of people of color in 2023 is two or more races, representing 15% and 11% of Wilsonville's and the Portland region's total populations, respectively.

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

The share of Wilsonville residents that identified as Hispanic/Latino increased between 2010 and 2023 from 12% to 16%.

Wilsonville's growth in residents with Hispanic or Latino ethnicity outpaced the Portland region and Oregon.

Exhibit 47. Hispanic or Latino Population as a Percentage of the Total Population, Wilsonville, Portland Region, and Oregon, 2010, 2019–2023

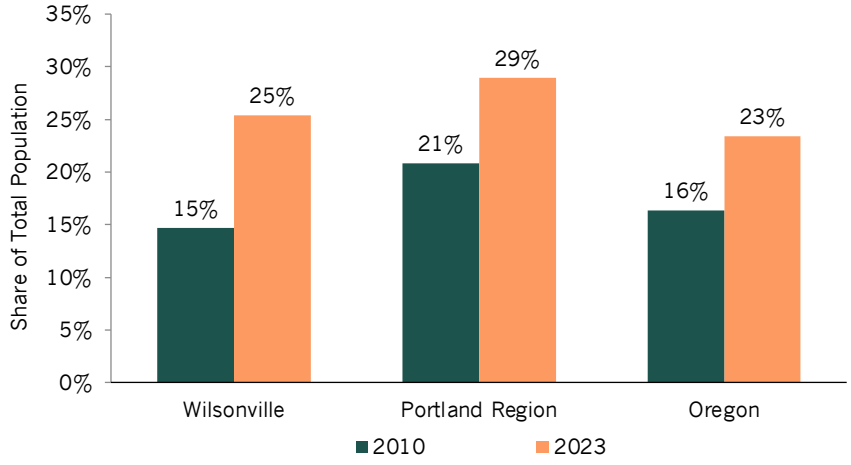


Source: U.S. Census Bureau, 2010 Decennial Census, Table P0008; 2019–2023 American Community Survey, 5-Year Estimates, Table B03002.

The share of people of color in Wilsonville increased between 2010 and 2023 from 15% to 25%.

Although Wilsonville's racial diversity increased at the fastest rate, it remains slightly less racially diverse than the Portland region.

Exhibit 48. Population of People of Color as a Percentage of the Total Population, Wilsonville, Portland Region, and Oregon, 2010, 2019–2023



Source: U.S. Census Bureau, 2010 Decennial Census Table P8; 2019–2023 American Community Survey, 5-Year Estimates, Table B02001.

INCOME AND WAGES

Income and wage levels can influence where businesses choose to locate. Industries that depend on lower-wage labor may be less likely to locate in areas with higher wages. In 2023, Wilsonville's median household income was $87,371—lower than Clackamas County's median but higher than the state median.

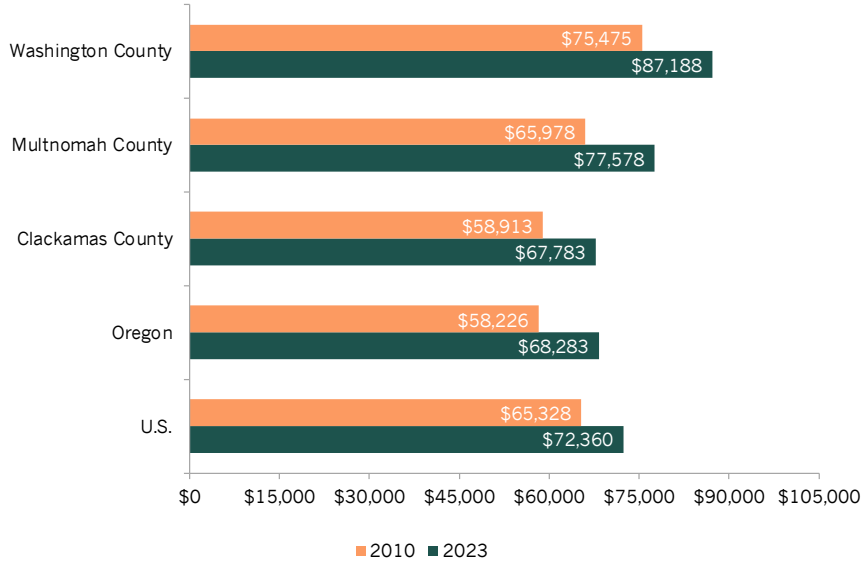
Average wages at businesses in Washington and Multnomah counties exceeded the Oregon average of $68,283, while Clackamas County's average wage was roughly in line with the state average.

From 2010 to 2023, average annual wages in Oregon and the Portland region grew faster than the national rate.

Oregon's wages rose by 17%, outpacing the 11% growth nationally. Still, Oregon's average wage in 2023 was $68,283, which remained below the U.S. average of $72,360.

Within the Portland region, average wages ranged from $67,783 in Clackamas County to $87,188 in Washington County.

Exhibit 49. Average Annual Wage, Covered Employment, Portland Region, Oregon, and U.S., 2010 to 2023, Inflation-Adjusted 2023 Dollars



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

The median household income in Wilsonville was lower than Clackamas County but higher than the state.

Exhibit 50. Median Household Income (MHI),[112] 2019–2023

$87,371	$100,360	$80,426
Wilsonville	Clackamas County	Oregon

Source: U.S. Census Bureau, American Community Survey 2019–2023 5-Year Estimates, Table B19013.

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

Wilsonville's median family income was similar to Clackamas County and higher than the state overall.

Exhibit 51. Median Family Income,[113] 2019–2023

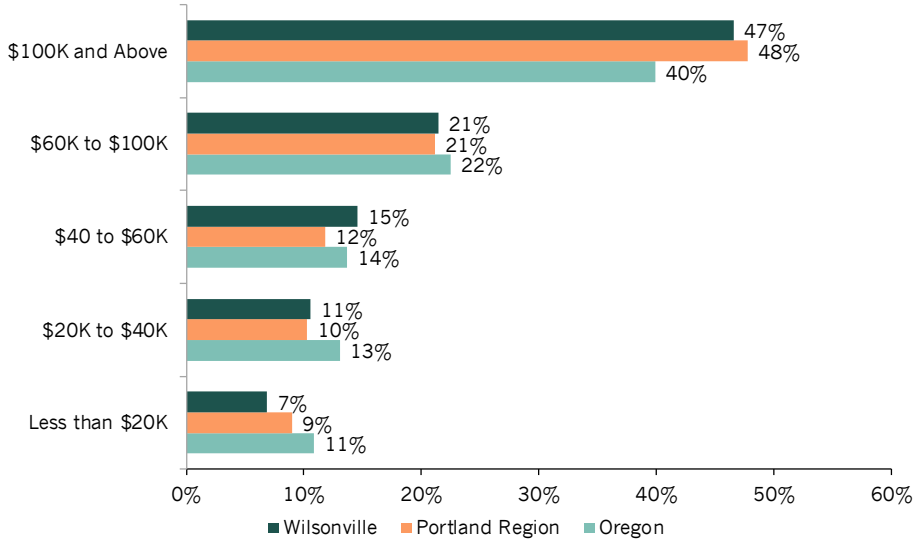
$115,941	$119,052	$98,832
Wilsonville	Clackamas County	Oregon

Source: U.S. Census Bureau, American Community Survey 2019–2023 5-Year Estimates, Table B19113.

Nearly half of Wilsonville households earned more than $100,000 annually, consistent with Portland region trends.

About 18% of Wilsonville households earned less than $40,000 annually.

Exhibit 52. Household Income by Income Group, Wilsonville, Portland Region, and Oregon, 2019–2023, Inflation-Adjusted 2023 Dollars



Source: U.S. Census Bureau, American Community Survey 2019–2023 5-Year Estimates, Table B19001.

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

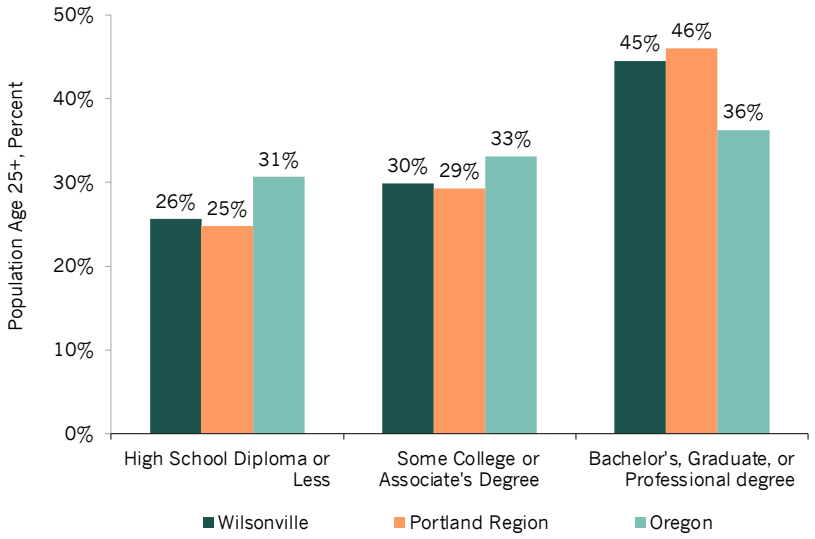
EDUCATIONAL ATTAINMENT

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

Wilsonville's educational attainment is higher than the state average and consistent with Portland region trends.

About 45% of Wilsonville residents hold a bachelor's, graduate, or professional degree, compared to 36% of Oregon residents statewide.

Exhibit 53. Educational Attainment for the Population 25 Years and Over, Wilsonville, Portland Region, and Oregon, 2019–2023



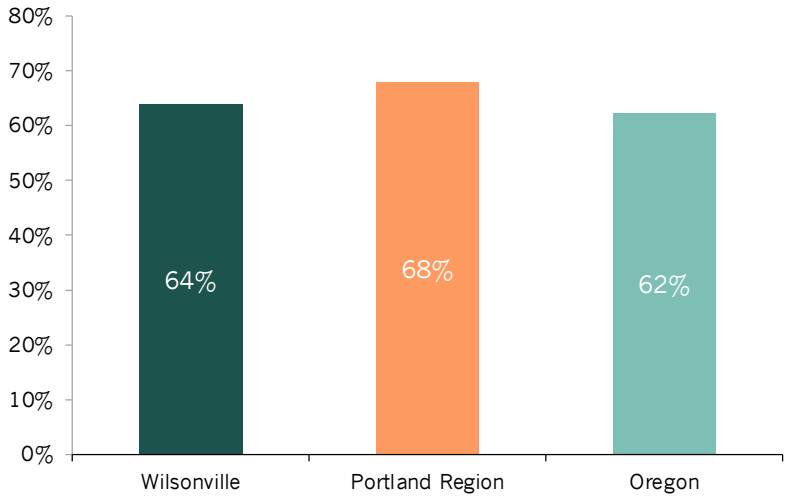
Source: U.S. Census Bureau, American Community Survey 2019–2023 5-Year Estimates, Table B15003.

LABOR FORCE PARTICIPATION AND UNEMPLOYMENT

Labor force participation is a key factor in assessing workforce availability. The labor force includes adults aged 16 and older who are either employed or actively seeking work. It does not include children, retirees, students, or others not currently looking for work. According to the 2019–2023 American Community Survey, the labor force included 1,505,127 people in the Portland region and 21,997 people in Wilsonville.

Wilsonville has a slightly lower labor force participation rate (64%) relative to the Portland region (68%).

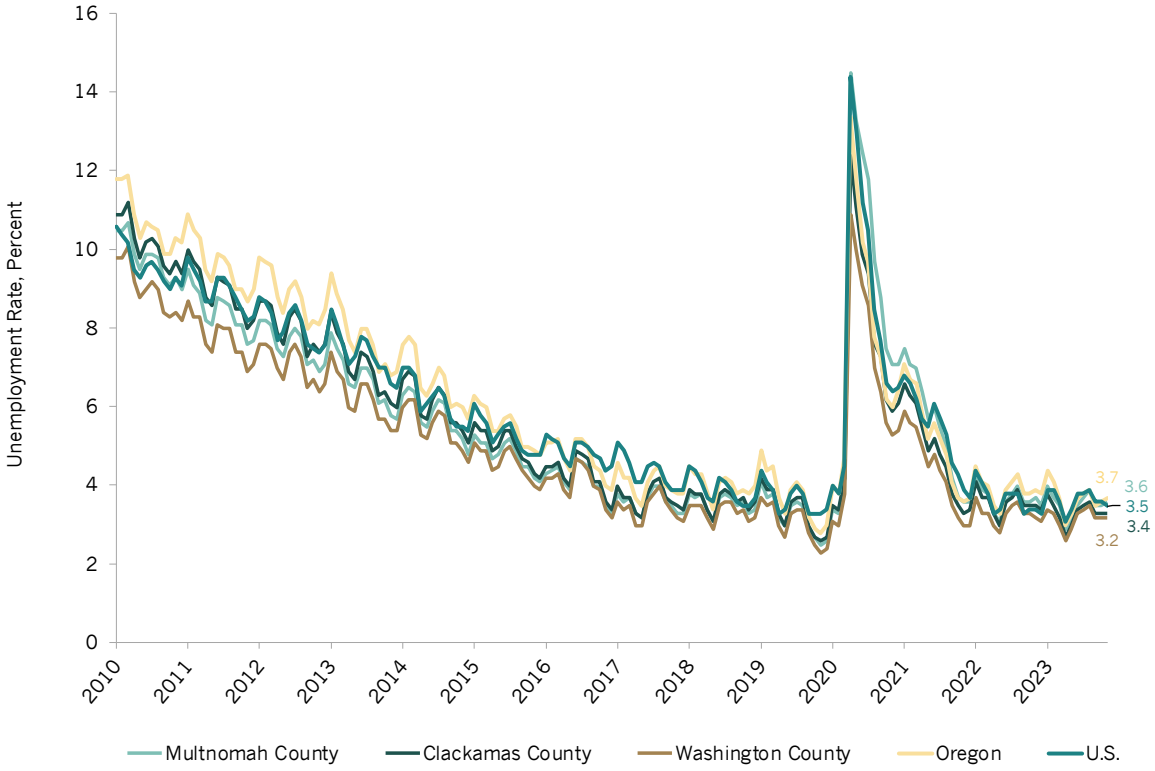
Exhibit 54. Labor Force Participation Rate, Wilsonville, Portland Region, and Oregon, 2019–2023



Source: U.S. Census Bureau, American Community Survey 2019–2023 5-Year Estimates, Table B23001.

In 2023, unemployment rates in the Portland region were similar to state and national averages, in **Exhibit 55.** Rates ranged from 3.2% in Washington County to 3.6% in Multnomah County, compared to 3.7% for Oregon and 3.6% nationally.

Exhibit 55. Unemployment Rate, Multnomah County, Washington County, Clackamas County, Oregon, and the U.S., 2000–2023



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

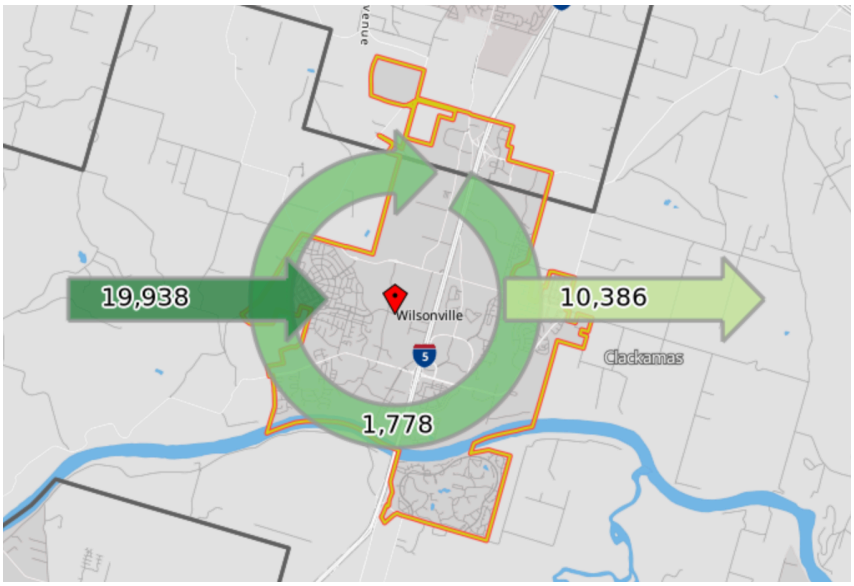
COMMUTING PATTERNS

Employers in Wilsonville benefit significantly from access to a labor pool that extends beyond City limits into neighboring areas of the Portland region, as well as Marion County. This access to a broader workforce through commuting allows businesses in Wilsonville to find suitable candidates for available positions, even if the local population alone may not provide enough qualified workers.

Wilsonville is part of an interconnected regional economy.

Nearly 20,000 people commuted into Wilsonville for work while just over 10,000 commuted out of Wilsonville for work. About 1,800 people both lived and worked in Wilsonville.

Exhibit 56. Commuting Flows, Wilsonville, 2022



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

Eight percent of all people who were employed at businesses in Wilsonville also lived in Wilsonville.

Ten percent of workers commute into Wilsonville from Portland and 5% commute from Salem.

Exhibit 57. Top Places Where Wilsonville Workers Lived, 2022

10%	8%	5%	3%
Portland	Wilsonville	Salem	Beaverton

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

About 15% of residents who lived in Wilsonville also worked in Wilsonville.

Twenty-two percent of Wilsonville residents commuted to Portland for work.

Exhibit 58. Top Places Where Wilsonville Residents Were Employed, 2022

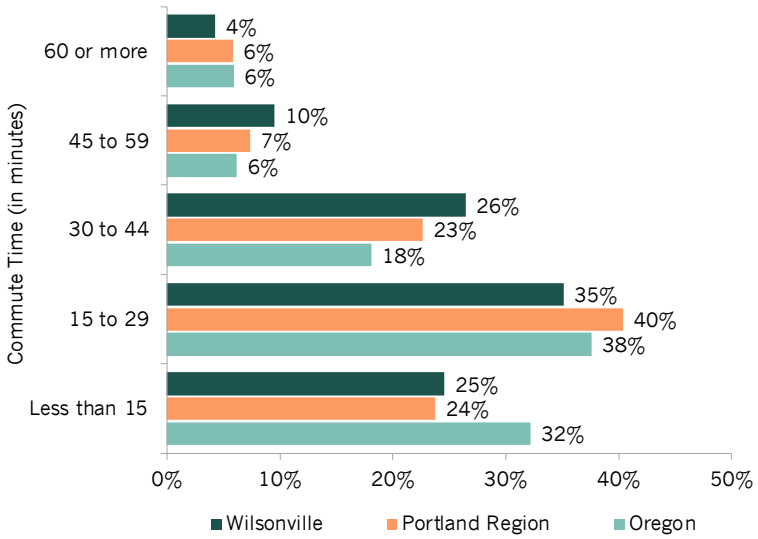
22%	15%	7%	5%
Portland	Wilsonville	Tualatin	Tigard

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

About 60% of Wilsonville residents had a commute time of less than 30 minutes.

About 26% of Wilsonville residents commute 30 to 44 minutes to work, with 14% commuting longer than 45 minutes. This distribution is similar to the broader Portland region.

Exhibit 59. Commute Time by Place of Residence, Wilsonville, Portland Region, and Oregon, 2019–2023



Source: U.S. Census Bureau, American Community Survey 2019–2023 5-Year Estimates, Table B08303.

Tourism in Clackamas County and the Portland Region

Tourism plays a crucial role in local economies by supporting businesses, creating jobs, and generating tax revenue. Dean Runyan Associates, a travel industry research firm, provides tourism data through Travel Oregon's TravelStats dashboard.[114] According to the dashboard, the Clackamas County welcomed about 3.5 million overnight visitors in 2023, representing 28% of overnight travel to the Portland region. Visitors to Clackamas County contributed over $551 million in direct travel spending in 2023, with the largest expenditures in food services, retail, and accommodations.

Direct travel spending in the Portland Region increased 21% from 2014 to 2023.

Clackamas County's tourism spending increased by 8% over the same period.

Exhibit 60. Direct Travel Spending ($ millions), 2014 and 2023 (not inflation adjusted)

2014	**$4,417.9** Portland Region	**$551.6** Clackamas County
2023	**$5,365.9** Portland Region	**$597.6** Clackamas County

Source: Dean Runyan Associates, Oregon Travel Impacts, 2014-2023.

In 2023, the category that saw the highest level of visitor spending in Clackamas County was food services, which includes restaurants, cafés, and other establishments that provide prepared meals and beverages.

Exhibit 61. Largest Visitor Spending Categories ($ millions), Clackamas County, 2023

$174.6 Food Services	**$99.6** Retail Sales	**$92.5** Accommodations

Source: Dean Runyan Associates, Oregon Travel Impacts, 2023

[114] Travel Oregon. "Oregon Travel Impacts dashboard" Dean Runyan Associates. Retrieved March 27, 2024, from https://www.travelstats.com/impacts/oregon

The industry with the most employment generated by travel spending in the Clackamas County in 2023 was accommodations and food services.

Exhibit 62. Largest Industry Employment Generated by Travel Spending, Clackamas County, 2023

5,500 jobs	1,300 jobs	543 jobs
Accommodations & Food Services	Arts, Entertainment & Recreation	Retail

Source: Dean Runyan Associates, Oregon Travel Impacts. 2023

Appendix B. Buildable Lands Inventory Methodology

The Buildable Lands Inventory (BLI) identifies commercial and industrial lands that are available for development for employment uses within Wilsonville. This appendix presents methods and definitions used to develop the commercial and industrial buildable lands inventory for Wilsonville.

Methods and Definitions

The BLI for Wilsonville includes all land that allows commercial and industrial uses within the Wilsonville City limits and Wilsonville's portion of the Metro UGB.[115] From a practical perspective, land was included in the BLI if it met all the following criteria:

1. It is inside the Wilsonville City limits and UGB area
2. It is inside a tax lot (as defined by Metro), and
3. Its current zoning/comprehensive plan designation allows employment uses. *Note that tax lots do not generally include roads, railroad rights-of-ways, or water.*

The inventory then builds from the tax lot–level database to estimate buildable land by Comprehensive Plan designation.

Inventory Steps

The five steps in the BLI are:

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

[115] This area includes the Wilsonville portion of the Basalt Creek Planning Area in the northwest quadrant of the City.

Step 1: Generate Study Area "Land Base"

The commercial and industrial inventory used all tax lots within the Wilsonville City limits and UGB area with the appropriate types of comprehensive plan designations that fall under those land use categories:

- Commercial (C)
- Industrial (I)
- Town Center (TC)
- Public (P)
- Undesignated

Figure 4 (on page 15) shows a map of these designations used in the BLI.

Step 2: Classify Lands by Buildable Area Status

In this step, ECOnorthwest classified each tax lot with an employment plan designation (based on the definitions in Table 5) into one of four mutually exclusive categories based on buildable area status:

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

ECOnorthwest identified buildable land and classified buildable area status using a rule-based methodology, which identifies that that is buildable (vacant and partially vacant land). The rules are described in Table 5. The buildable area status classifications of the BLI land base are visualized in map format below in Figure 5.

Exhibit 63. Rules for Buildable Area Status Classification

BUILDABLE AREA STATUS	DEFINITION	STATUTORY AUTHORITY
Vacant Land	Tax lots designated as vacant by Metro based on the following criteria: 1. Fully vacant based on Metro aerial photos 2. Tax lots with less than 2,000 square feet developed AND developed area is less than 10% of lot 3. Lots 95% or more vacant from GIS vacant land inventory.	OAR 660-009-0005(5); Oregon Metro BLI Methodology (2024)[116]
Partially Vacant Land	A tax lot: 1) Between one and five acres occupied by a use that could still be further developed based on zoning; or 2) Equal to or larger than five acres where one half-acre or more is occupied by permanent buildings or improvements where excess land that could be further developed is present. This determination was based on a visual assessment and City staff verification.	No statutory definition
Public	Lands in public or semi-public ownership are considered unavailable for commercial or industrial development. This includes lands in Federal, State, County, or City ownership as well as lands owned by churches and other semi-public organizations and properties with conservation easements. These lands are identified using the Metro's definitions and categories.	No statutory definition
Developed Land	Lands not classified as vacant, partially vacant, or public/exempt are considered developed. Developed land includes lots with redevelopment capacity, which are also included in BLI.	OAR 660-009-0005(1)

[116] https://www.oregonmetro.gov/sites/default/files/2024/10/25/2024-UGR-Appendix-2-with-attachments.pdf

Step 3: Identify Constraints

As shown in Table 6, the BLI included development constraints consistent with guidance in OAR 660-009-0005(2) and Metro's 2024 BLI methodology.

Exhibit 64. Constraints Included in BLI

DEVELOPMENT STATUS	STATUTORY AUTHORITY	THRESHOLD	SOURCE
Goal 5 Natural Resource Constraints			
Title 3 (Stream and Floodplain Protection Plan)	OAR 660-009-0005(2)	Lands within Metro-defined Title 3 areas	Metro
Title 13 (Habitat Conservation Areas)	OAR 660-009-0005(2)	Lands within Conservation Areas identified as "High" or "Very High"	Metro
Significant Resource Overlay Zone	OAR 660-009-0005(2)	Lands within the Wilsonville-defined Significant Resource Overlay Zone	City of Wilsonville
Pacific Habitat Services in Basalt Creek	OAR 660-009-0005(2)	Lands within riparian areas, upland tree groves, or wetlands, as identified by Pacific Habitat Services in the Basalt Creek area.	Pacific Habitat Resources
Natural Hazard Constraints			
FEMA Regulatory Floodway and 100-Year Floodplains	OAR 660-009-0005(2)	Lands within FEMA–defined regulatory floodway or 100-year floodplains	FEMA via National Flood Hazard Layer Interactive Viewer
Steep Slopes	OAR 660-009-0005(2)	Slopes greater than 15%	Oregon Department of Geology and Mining Industries

These areas were evaluated as prohibitive constraints (unbuildable). All constraints were merged into a single constraint file, which was then used to identify the area of each tax lot that is constrained. These areas were deducted from lands identified as vacant or partially vacant. Figure 6 (page 17) shows a map of the individual constraints.

Step 4: Verify Inventory Results

ECOnorthwest used a multistep verification process. The first verification step involved a "visual assessment" of land classifications using GIS and recent aerial photos. The visual assessment involves reviewing classifications overlaid on recent aerial photographs to verify uses on the ground. ECOnorthwest reviewed all tax lots included in the inventory using the visual assessment methodology. The second round of verification involved City staff verifying the visual assessment output. ECOnorthwest amended the BLI based on City staff review and a discussion of staff's comments. The final verification included review by stakeholders, including by members of the Technical Advisory Committee.

Step 5: Tabulate and Map Results

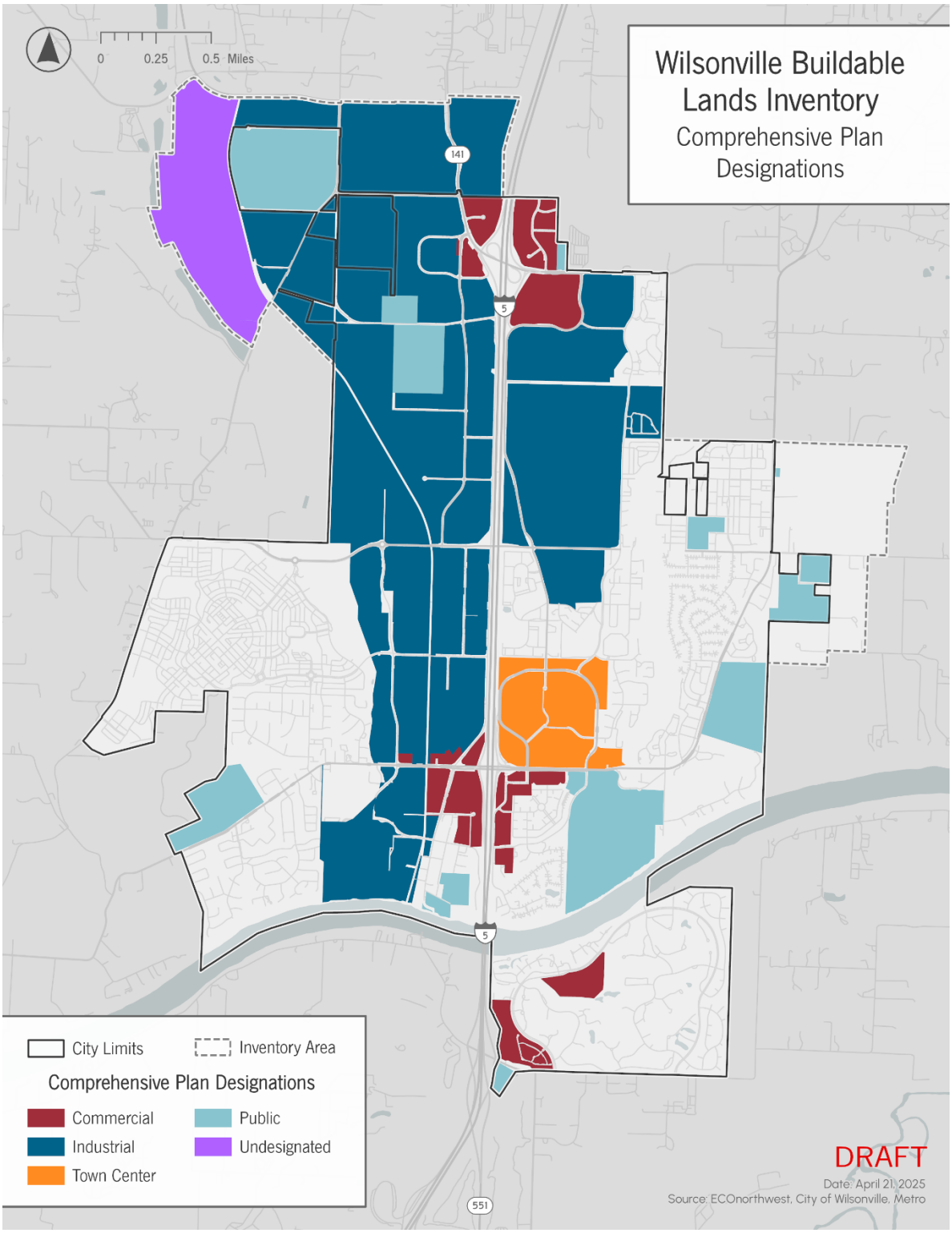
The results of the commercial and industrial BLI are presented in tabular form and maps in the remainder of this Appendix. These maps separately show the existing Comprehensive Plan designations, individual constraints used, the land base by buildable area status with aggregated constraints represented,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

Exhibit 65. Buildable Acres in Vacant/Partially Vacant Tax Lots by Wilsonville Comprehensive Plan Designation, Wilsonville City limits and UGB area, 2025

Plan Designation	Total Buildable Acres	Buildable Acres on Vacant Lots	Buildable Acres on Partially Vacant Lots
Commercial	4	4	0.3
Industrial	308	178	130
Town Center	9	9	-
Undesignated	45	1	44
Total	**366**	**191**	**175**

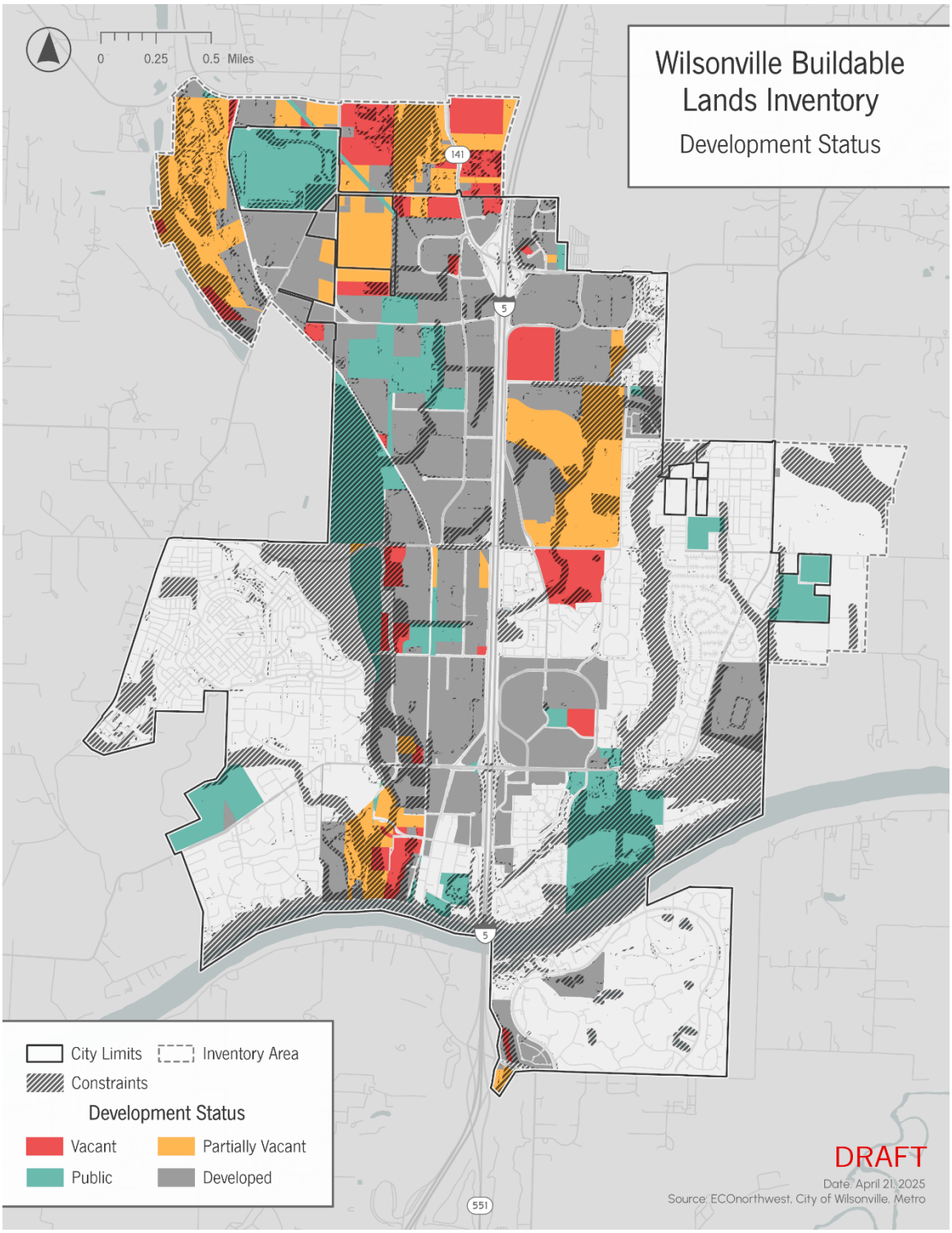
Source: ECOnorthwest analysis, City of Wilsonville, Metro

Exhibit 66. Comprehensive Plan Designations Included in the Employment Land Base, Wilsonville City limits and UGB area, 2025



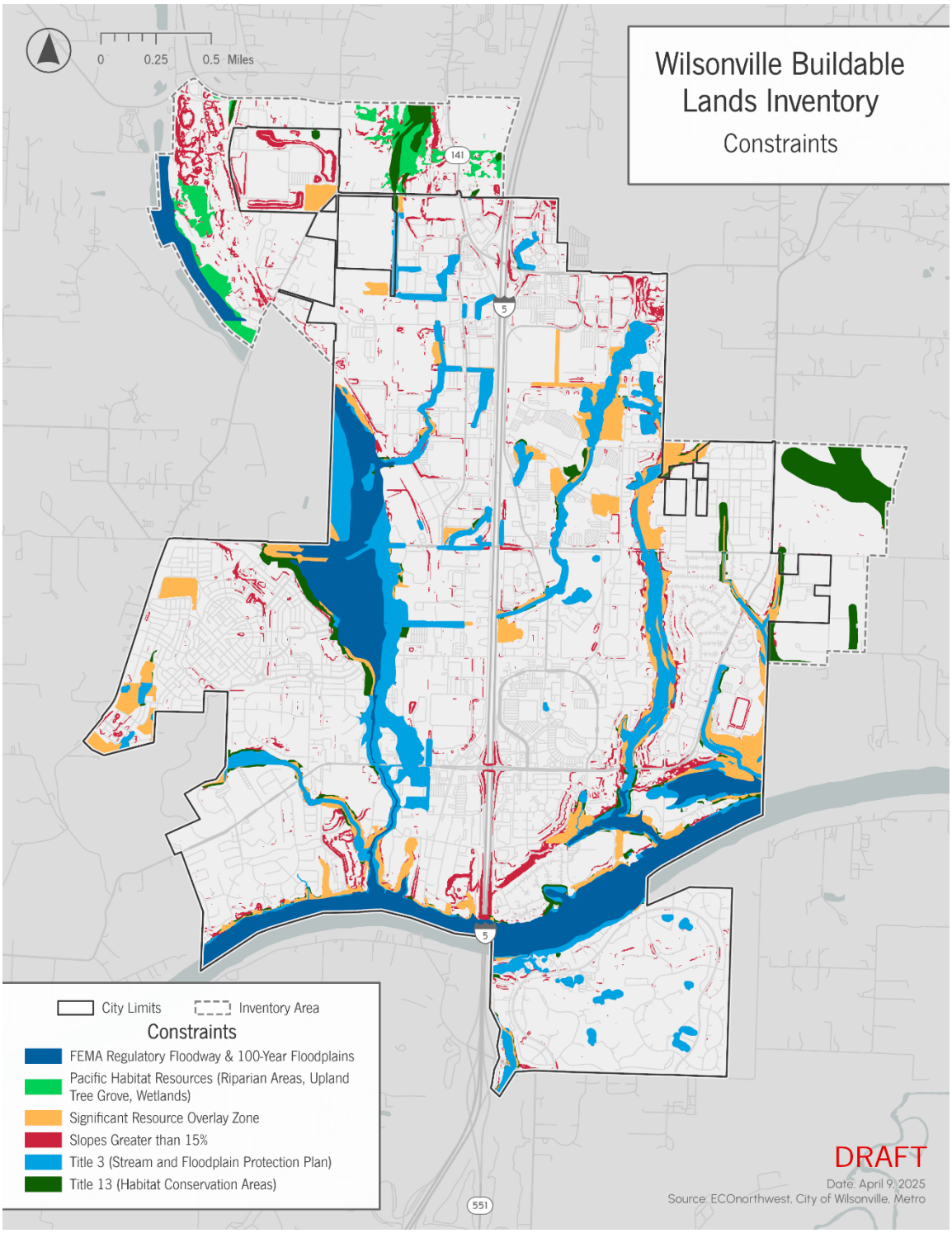
Source: ECOnorthwest analysis, City of Wilsonville, Metro

Exhibit 67. Buildable Area Status with Constraints, Wilsonville City limits and UGB area, 2025



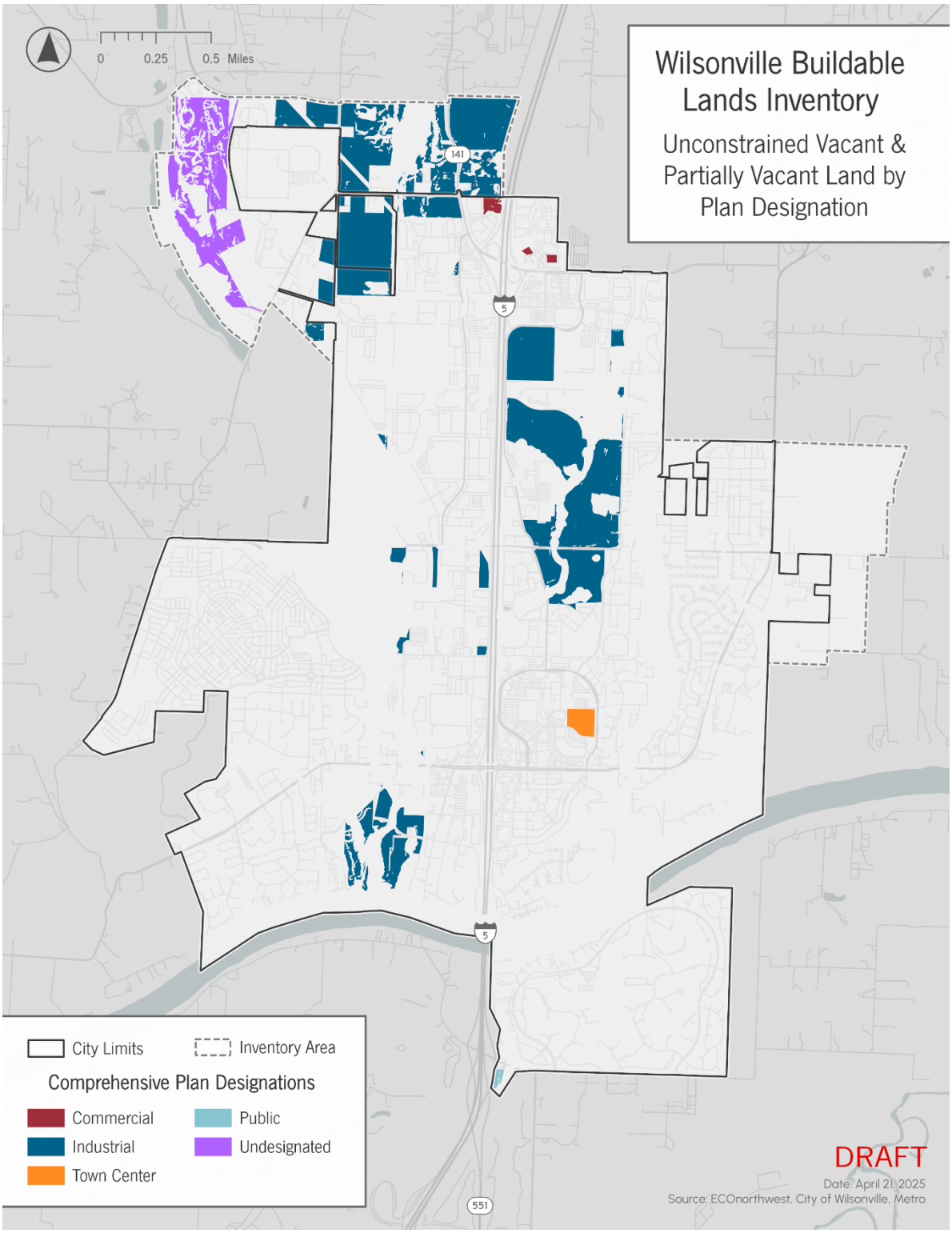
Source: ECOnorthwest analysis, City of Wilsonville, Metro

Exhibit 68. Development Constraints, Wilsonville City limits and UGB area, 2025



Source: ECOnorthwest analysis, City of Wilsonville, Metro, Pacific Habitat Services, USGS

Exhibit 69. Buildable Employment Land by Comprehensive Plan Designation, Wilsonville City limits and UGB area, 2025



Source: ECOnorthwest analysis, City of Wilsonville, Metro