

DATE: July 1, 2025
TO: City of Wilsonville
FROM: Nicole Underwood, Barrett Lewis, and Beth Goodman, ECONorthwest
SUBJECT: Wilsonville Economic Opportunity Analysis: Buildable Lands Inventory

The City of Wilsonville is undertaking an Economic Opportunities Analysis (EOA) to assess whether the city's existing supply of employment land is sufficient to support anticipated business and job growth between 2026 and 2046. This technical assessment will be paired with the development of an Economic Development Strategy, which will offer targeted policy recommendations and implementation steps to advance economic growth that aligns with local priorities.

This memorandum presents the findings of the Buildable Lands Inventory (BLI) for land designated for employment in Wilsonville. Specifically, it identifies the amount and characteristics of land available to support future *commercial* and *industrial* development. Ultimately, this memorandum will be incorporated as a chapter into Wilsonville's EOA and will inform the Economic Development Strategy.

Contents of This Memorandum:

- ◆ **Buildable Lands Inventory:** Summarizes the results of the commercial and industrial BLI for Wilsonville.
- ◆ **Appendix A – Methods and Definitions:** Describes the methodology and key definitions used in compiling the BLI for Wilsonville.

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.¹

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.

¹ 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. Table 1 provides a breakdown of the land base by Wilsonville Comprehensive Plan designation within Wilsonville.

Table 1. 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

Table 2 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.

Table 2. 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:

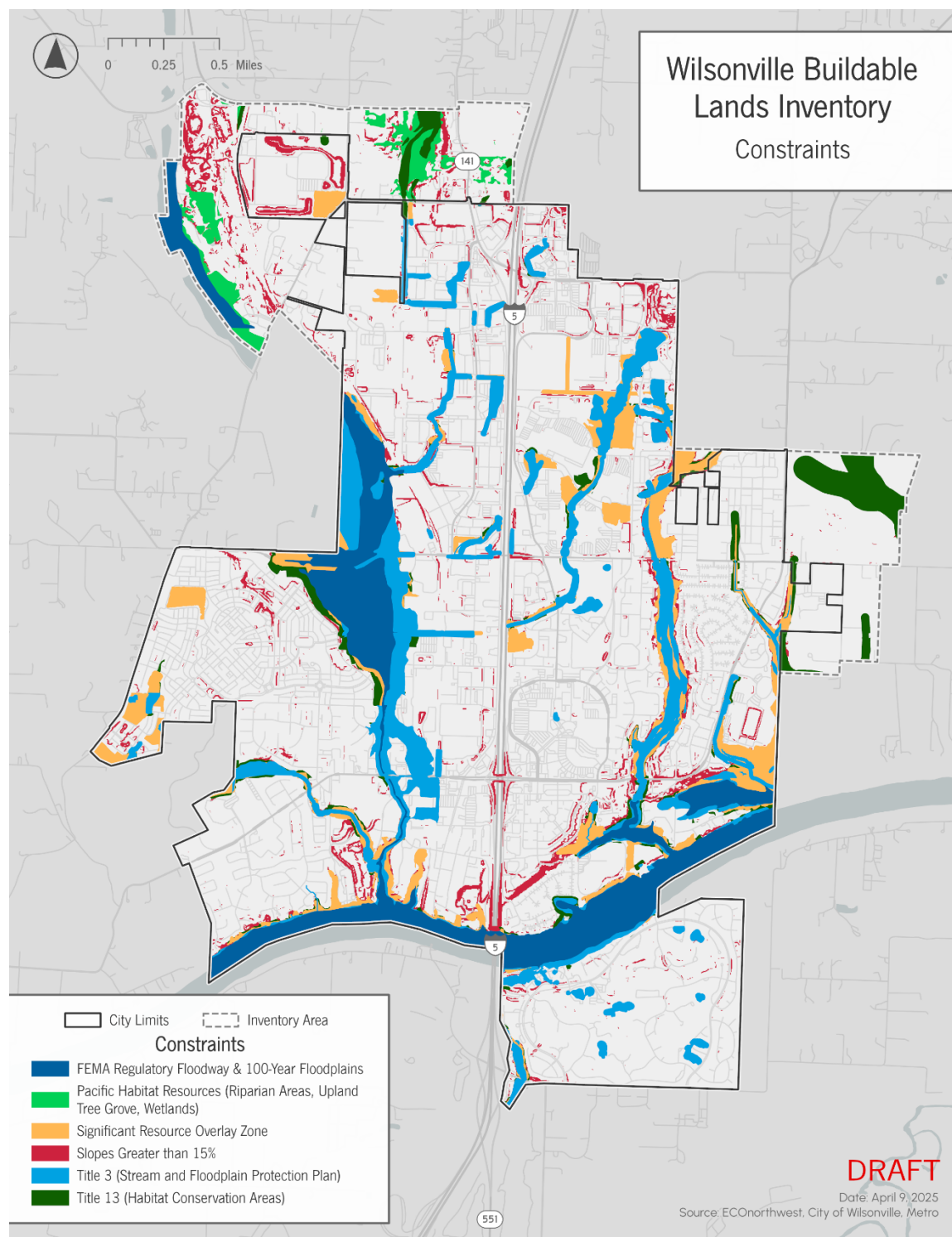
- ◆ FEMA 100-Year Floodplains and Regulatory Floodway
- ◆ High or very high landslide susceptibility
- ◆ Slopes greater than 15%
- ◆ Title 3 (Stream and Floodplain Protection Plan)
- ◆ Title 13 (Habitat Conservation Areas)
- ◆ Significant Resource Overlay Zone (SROZ)
- ◆ Pacific Habitat Services (riparian areas, upland tree groves, or wetlands) 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.



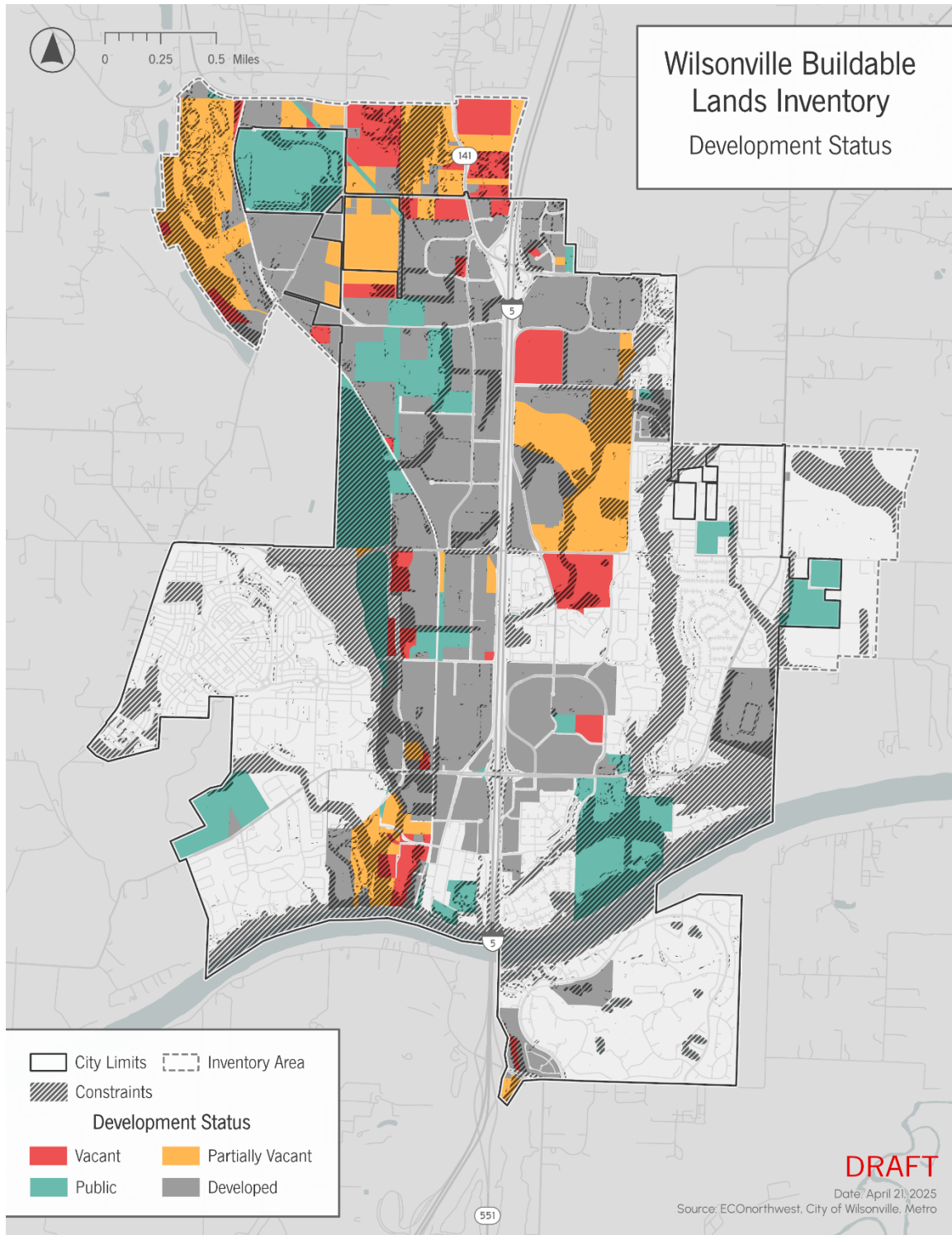
Figure 1. Development Constraints, Wilsonville city limits and UGB area, 2025



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



Figure 2. 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.).

Table 3 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.

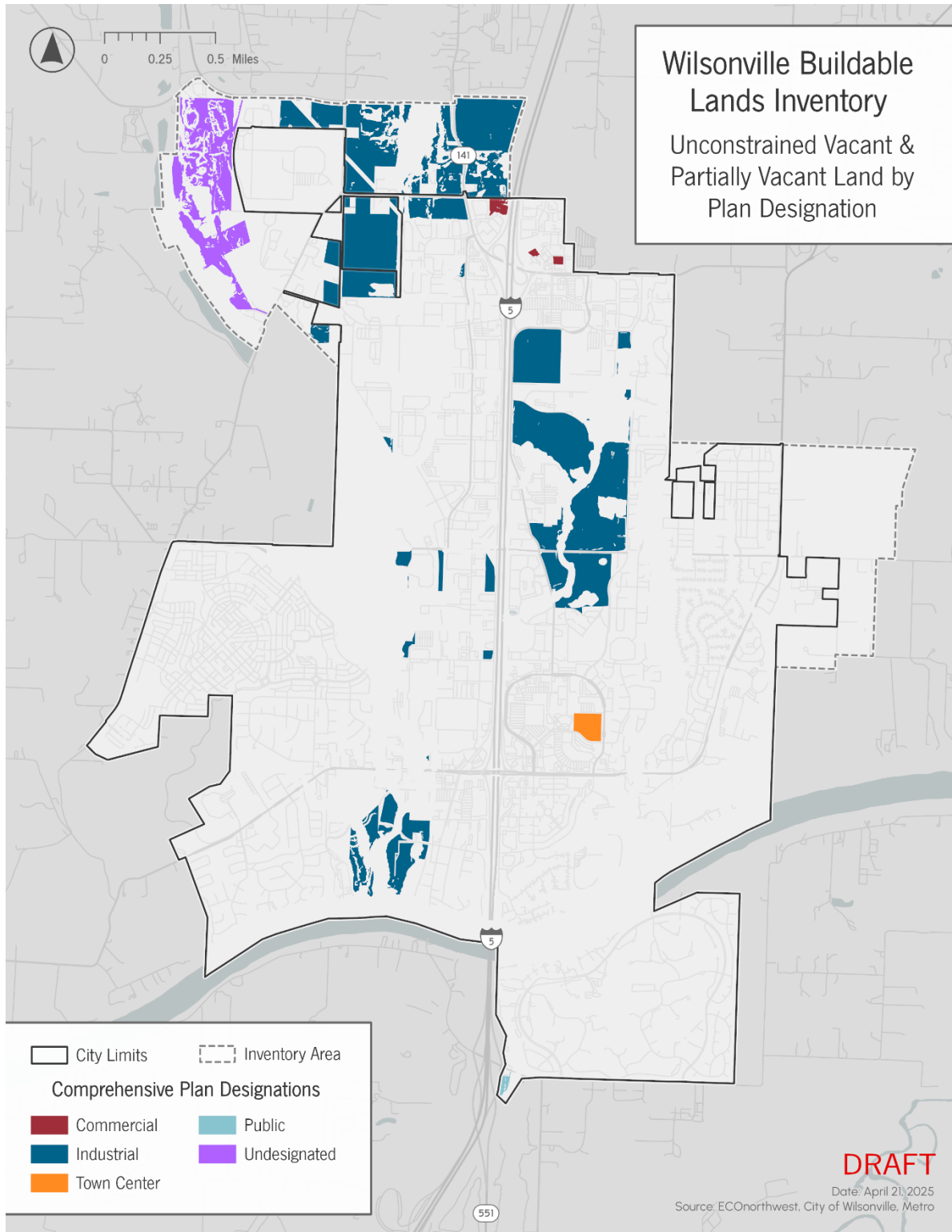
Table 3. Buildable Acres in Vacant/Partially Vacant Tax Lots by Wilsonville Comprehensive Plan Designation, Wilsonville city limits and UGB area, 2025

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



Figure 3. Buildable Employment Land by Plan Designation, Wilsonville city limits and UGB area, 2025



Source: ECONorthwest analysis, City of Wilsonville, Metro



Table 4 shows the size of lots by plan designations for buildable employment land.

Table 4. 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



Appendix A – Methods and Definitions

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.² 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

² 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.



Table 5. 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: <ol style="list-style-type: none"> 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) ³
Partially Vacant Land	A tax lot: <ol style="list-style-type: none"> 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. <p>This determination was based on a visual assessment and City staff verification.</p>	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)

³ <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.

Table 6. 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.

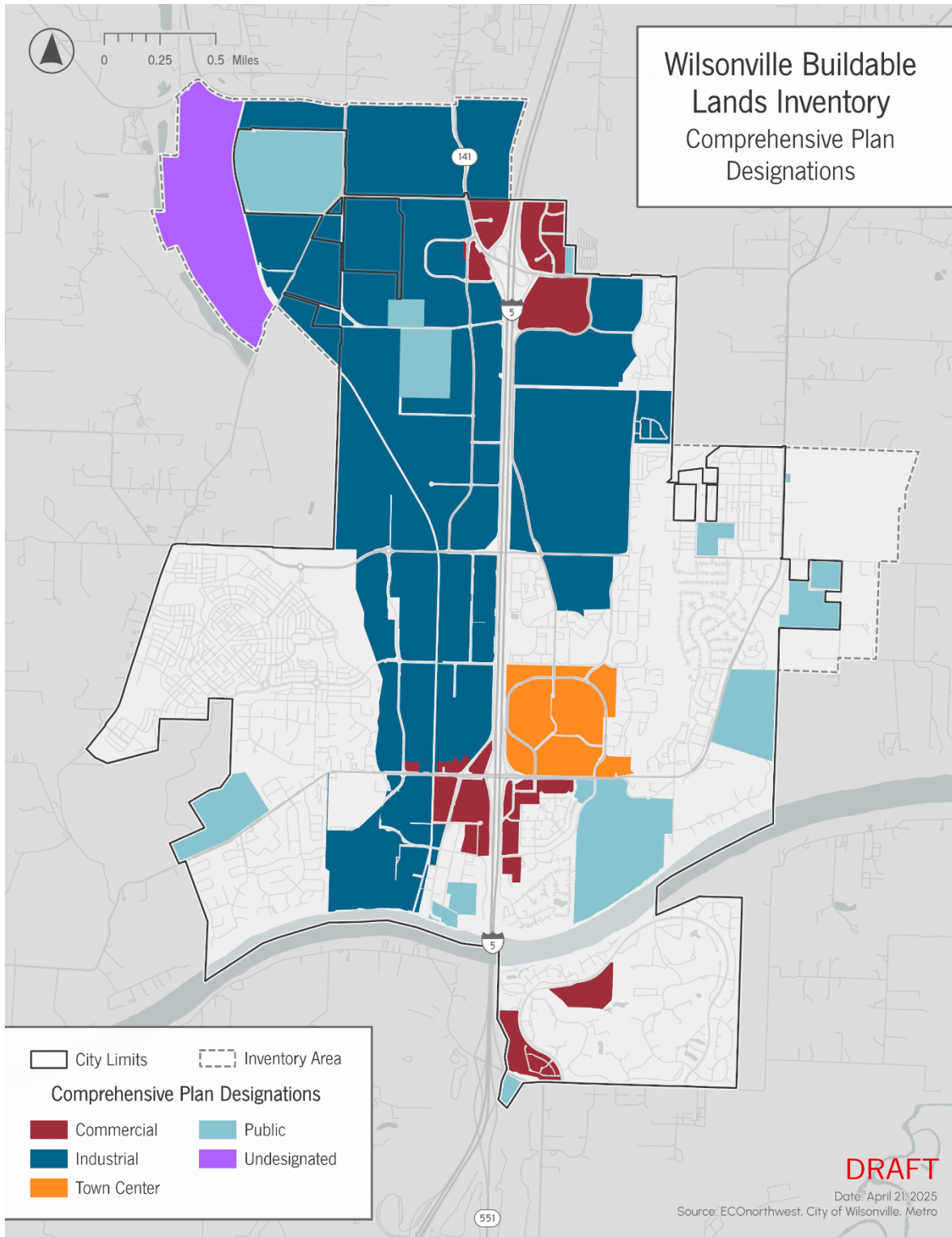
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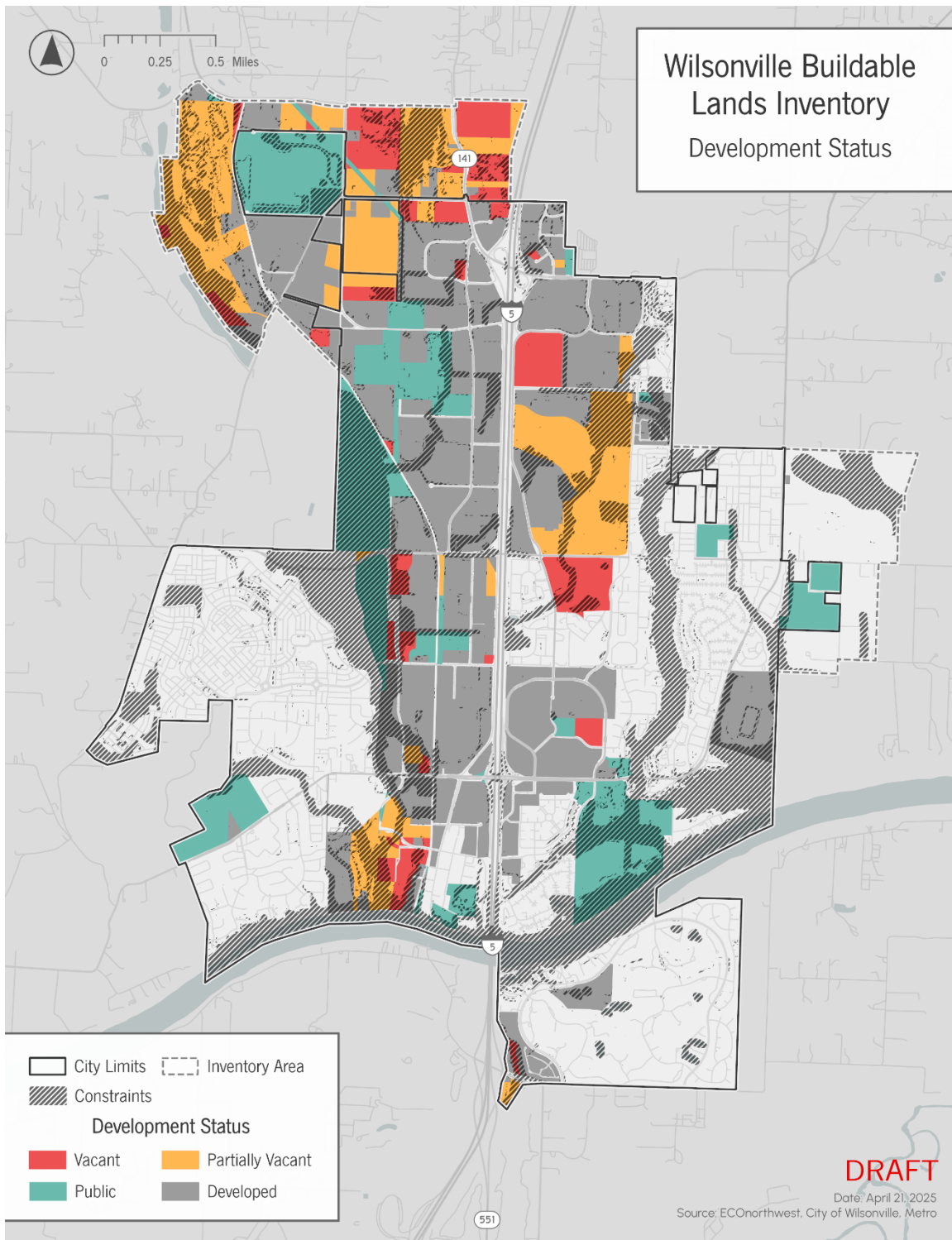
Figure 4. Comprehensive Plan Designations Included in the Employment Land Base, Wilsonville city limits and UGB area, 2025



Source: ECONorthwest analysis, City of Wilsonville, Metro

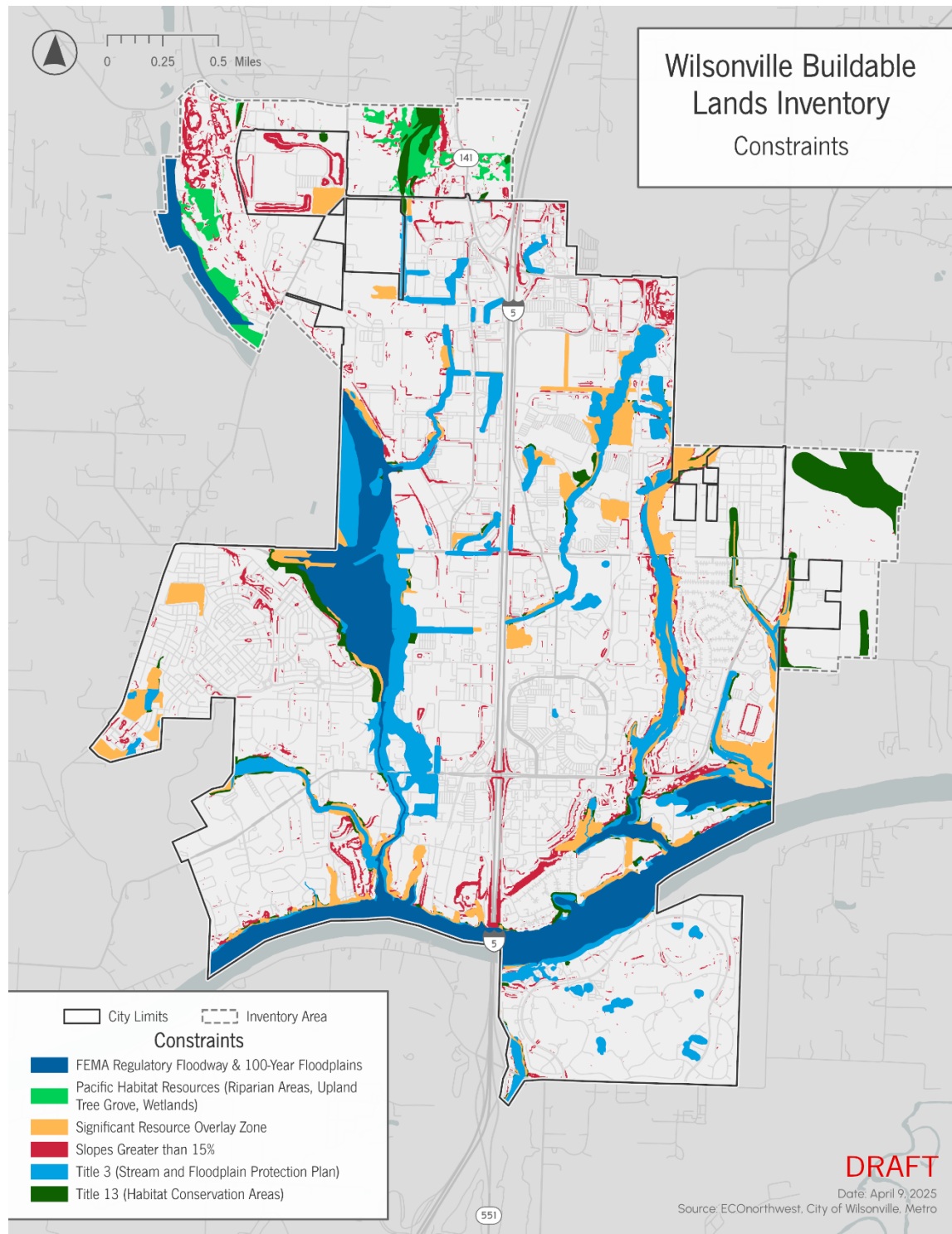


Figure 5. Buildable Area Status with Constraints, Wilsonville city limits and UGB area, 2025



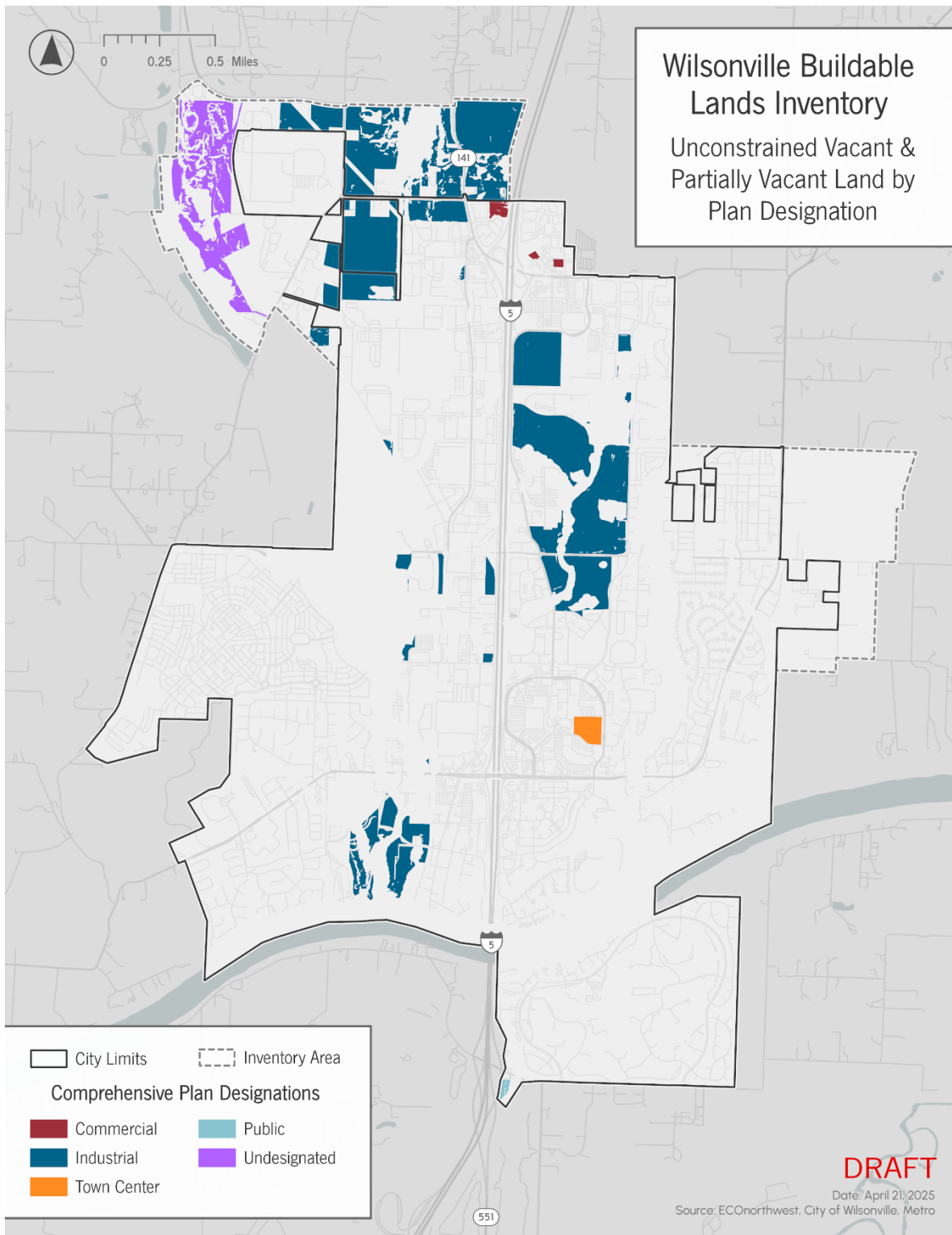
Source: EConorthwest analysis, City of Wilsonville, Metro

Figure 6. Development Constraints, Wilsonville city limits and UGB area, 2025



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

Figure 7. Buildable Employment Land by Comprehensive Plan Designation, Wilsonville city limits and UGB area, 2025



Source: ECONorthwest analysis, City of Wilsonville, Metro

