

CLACKAMAS COUNTY BOARD OF COUNTY COMMISSIONERS

Policy Session Worksheet

Presentation Date: 9/29/2026

Approx. Start Time: 2:00 pm

Approx. Length: 30 minutes

Presentation Title: Employment Land Analysis and Comprehensive Economic Development Strategy Updates

Department: Department of Transportation & Development / Office of Economic Development

Presenters: Sarah Eckman, Assistant Director
Laura Edmonds, Manager

WHAT ACTION ARE YOU REQUESTING FROM THE BOARD?

Informational Update: Economic Opportunity Analysis Study findings and Comprehensive Economic Development Strategy (CEDS).

EXECUTIVE SUMMARY:

The Clackamas County OED Workplan, accepted by the Board of County Commissioners, includes economic priorities, goals and strategies to support a vibrant economy with components to ensure a focus on employment land availability.

Employment Site Readiness Studies

To fully understand land availability in Clackamas County, OED contracted with Mackenzie Inc, to perform Employment Site Readiness Studies. Two of the three phases of the studies have been completed. The last phase will be conducted by early 2027.

Phase 1: The Industrial Site Readiness Study took into account industrial land, 5 acres and more, within unincorporated Clackamas County. (Staff presented to the Board on April 28, 2026)

Phase 2: The Economic Opportunity Analysis (EOA) Analysis takes into account industrial, commercial and mixed use within incorporated cities in Clackamas County.

EOA Analysis: In Phase 2: EOA Analysis, Mackenzie reviewed EOAs for ten incorporated cities within Clackamas County: Estacada, Lake Oswego, Milwaukie, Canby, Happy Valley, Molalla, Sandy, Tualatin, West Linn, and Wilsonville (EOAs completed between 2011 and 2025). Findings from each city's Buildable Land Inventory (BLI) were extracted to compare and aggregate the buildable land available for industrial and commercial uses (vacant and redevelopable), as well as the forecasted land demand in the EOAs, and the resulting surplus or deficit for each city.

Phase 2 findings reflect point-in-time data that may not take into account more recently rezoned lands. Results detailed in Attachment A of this packet are:

- Combined, jurisdictions have approximately **930 parcels** of BLI – estimated at 1,700 acres
- 68% of identified parcels are smaller than 1 acre
- 22% are 1 - 4.99 acres; fewer than 10% are larger than 5 acres (89 total) which make up more than 1,000 acres (of the 1,700)
- **66% of BLI is located outside the Metro boundary in four cities** (Canby, Estacada, Molalla and Sandy)
- In the Metro boundary, 276 of 373 (74%) smaller than 1 acre, are located in Happy Valley, Oregon City and Wilsonville
- 75% of the 1,700 BLI is in industrial zones
- Largest sites are located in Estacada (est 50 acres); aggregated sites (est 94 acres)

Phase 3: This phase will analyze commercial and mixed-use inventory, providing a more robust picture of available employment lands in *unincorporated* Clackamas County. Staff are currently working on a scope of work with Mackenzie.

These studies will also help to support facts and findings when the Land Suitability Assessment study is underway. Together, all these studies give Clackamas County a stronger factual foundation to understand employment land needs, identify opportunities and constraints, and plan for growth.

Comprehensive Economic Development Strategy (CEDS):

The region, under the leadership of Greater Portland Inc in partnership with Metro, develops the region's CEDS every five years. The Greater Portland Economic Development District (GPEDD) Board/Steering Committee & Technical Advisory Committee (TAC) have been formed to guide the development of the next CEDS. The TAC includes regional partners from Multnomah, Washington, Clackamas and Clark Counties.

CivicSol is contracted to assist with the CEDS and has completed the following analysis:

- *Cluster Evaluation:* Emerging Sector analysis;
- *Competitive Benchmarking* (peer region comparisons include: Denver, Cincinnati, Kansas City, Las Vega/Henderson, Milwaukee WI, Minneapolis, Nashville, Phoenix-Mesa-Chandler, Pittsburgh, Sacramento & Salt Lake City);
- *6 Industry Roundtables* were held in August: Software/Digital Media; Health & Life Sciences; Advanced Manufacturing, Semiconductor & Clean Tech; Consumer & Lifestyle Products; Regional Economic Development; Workforce Development & Education.
- *Next step: CivicSol will perform an Emerging Trends and Economic Disruption Analysis; once all steps are completed, all findings will be compiled into the recommended regional CEDS; final strategies are due by 12/31/2026.*

FINANCIAL IMPLICATIONS (current year and ongoing):

Is this item in your current budget? ☒ YES ☐ NO

What is the cost? \$50,000 – Employment Site Readiness Studies
\$5,000 – CEDS

What is the funding source? Lottery Dollars (no General Funds were used)

STRATEGIC PLAN ALIGNMENT:

- How does this item align with the County's Performance Clackamas goals? Vibrant Economy and Build Public Trust through Good Government

LEGAL/POLICY REQUIREMENTS:

All contracts have been completed in coordination with County Procurement and Counsel.

PUBLIC/GOVERNMENTAL PARTICIPATION:

The Greater Portland Economic Development District (GPEDD) Board/Steering Committee & Technical Advisory Committee (TAC) have been formed to guide the development of the next CEDS. The TAC includes regional partners from Multnomah, Washington, Clackamas and Clark Counties.

OPTIONS:

None

RECOMMENDATION:

N/A – Informational Only

ATTACHMENTS:

Attachment A: Mackenzie Economic Opportunity Analysis

Attachment B: Land Availability Studies one-pager summary

SUBMITTED BY:

Division Director/Head Approval _____

Department Director/Head Approval *Dan Johnson*

County Administrator Approval _____

For information on this issue or copies of attachments, please contact Laura Edmonds 503-742-4366

MACKENZIE.

2025 EMPLOYMENT SITE READINESS STUDY

To
Clackamas County

For

Office of Economic
Development

Dated
June 26, 2026

Project Number
2250163.00



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RiverEast Center | 1515 SE Water Avenue, Suite 100, Portland, OR 97214
PO Box 14310, Portland, OR 97293 | T 503.224.9560 | www.mackenzie.inc

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I. EXECUTIVE SUMMARY

In order to support Clackamas County's economic development efforts, Mackenzie reviewed, analyzed, and mapped employment lands throughout the county through several different tasks. This document includes three chapters, one with findings from each task. Some of the tasks build off of one another while others are discrete and separate tasks, but all are summarized here together in one large report.

Chapter 1: Vacant Industrial Parcel Analysis

For the first task of this project, Mackenzie performed a desktop analysis of vacant and/or redevelopable industrially zoned parcels greater than 5 acres in unincorporated Clackamas County to better understand land availability and potential for future industrial development in the County. The analysis identified a total of 23 parcels that fit into one of four categories for development potential (Development-ready, Developable with constraints, Unlikely to develop due to constraints, and Active business use present). These parcels add up to approximately 457 acres.

Approximately 90% of all inventoried parcel acreage (19 out of 23 parcels) are in Category 4: *Active business use present*. Additionally, 43% of parcels (10 of the 23 parcels inventoried) are impacted by environmental constraints such as steep terrain, wetlands, and flood hazard zones. There are two parcels in the most promising category (Category 1: Development-ready), both owned by Clackamas County Development Agency (parcels 1 and 2). Mackenzie put additional consideration into development potential for these two parcels, including re-grouping the bisected and disconnected parcel segments and aggregating the parcel segments with adjacent smaller parcels under the same ownership to create two potential development-ready parcels.

Chapter 2: Economic Opportunity Analysis (EOA) Summary

For the second task of this project, Mackenzie reviewed Economic Opportunity Analyses (EOAs) for ten incorporated cities within Clackamas County: Estacada, Lake Oswego, Milwaukie, Canby, Happy Valley, Molalla, Sandy, Tualatin, West Linn, and Wilsonville (EOAs completed between 2011 and 2025). Findings from each city's Buildable Land Inventory (BLI) were extracted to compare and aggregate the buildable land available for industrial and commercial uses (vacant and redevelopable), as well as the forecasted land demand in the EOAs, and the resulting surplus or deficit for each city. This analysis illustrates that there is a wide range of forecasted land scenarios for cities within Clackamas County, with some cities forecasted to have surpluses of hundreds of acres, and other cities forecasted to have deficits of hundreds of acres.

Mackenzie tabulated the total buildable employment land for both commercial and industrial land for all these cities within Clackamas County, resulting in a total of 2,051 acres (AC) of buildable industrial land and 627 AC of buildable commercial land. After accounting for the three cities that are in Clackamas County but are also a part of another county (Lake Oswego, Tualatin, and Wilsonville), the adjusted total by share of cities' area within Clackamas County is 1,404 AC of buildable industrial land, and 601 AC of buildable commercial land. (The methodology for accounting for multi-county cities is detailed in Appendix 5.)

Combining the forecasted needs for each of the cities highlighted overall deficits for both industrial and commercial land: a deficit of 194 AC of industrial land and a deficit of 169 AC of commercial land across

the cities within Clackamas County.¹ After accounting for multi-county cities, the adjusted overall deficits by share of cities' area within Clackamas County are a deficit of 841 AC of industrial land, and a deficit of 196 AC of commercial land.

Chapter 3: BLI Mapping and Analysis

After summarizing these ten EOAs in task 2, Mackenzie analyzed and mapped the Buildable Land Inventory (BLI) for Canby, Estacada, Gladstone, Happy Valley, Johnson City², Lake Oswego, Milwaukie, Molalla, Oregon City, Sandy, Tualatin², West Linn, and Wilsonville.³ This analysis involved identifying the status of the buildable employment land as vacant, partially vacant/infill, or redevelopable based on 2024 data from Metro and data from the jurisdictions outside of Metro (from various years between 2019 and 2025). Important attributes such as parcel size and zoning classification were recorded. Additionally, to highlight potential impact of parcel aggregation, Mackenzie identified parcels which may be suitable candidates for aggregation based on shared property boundaries in order to create larger development sites.

Mackenzie found that the analyzed jurisdictions have approximately 930 parcels of buildable employment land (commercial, industrial, and mixed use). Approximately 68% of the identified parcels are smaller than one (1) acre in size and another 22% are in the 1-4.99-acre size range, meaning fewer than 10% of the analyzed parcels are larger than 5 acres. Importantly, this analysis is a snapshot in time, using the best available data, and may not be reflective of current conditions.

The analysis and technical findings are detailed in the following report and in the appendices, which include the map packages, spreadsheet deliverables, and in-depth methodologies.

¹ Goal 9 does not have a required method for employment forecasting. Each city has different approaches to forecasting demand scenarios, creating difficulty in direct comparison. Professional judgement was used to select the most similar forecast for each city for this analysis, selecting the forecasts based on OED employment growth trends and industry trends, or whatever forecast was available when only one was provided. The process for selecting comparable scenarios is detailed in Appendix 5.

² No buildable employment land parcels were identified by Metro in Johnson City and Tualatin (the portion of the City within Clackamas County). Therefore, these two jurisdictions have not been included in further steps of this study.

³ Only the portions of Lake Oswego, Tualatin, and Wilsonville within Clackamas County were studied in this analysis.

II. CHAPTER 1: VACANT INDUSTRIAL PARCEL ANALYSIS

Purpose

To support Clackamas County's economic development effort, Mackenzie performed a desktop analysis of vacant and/or redevelopable industrially zoned parcels greater than 5 acres in unincorporated Clackamas County. This analysis can help County staff better understand land availability and potential for future industrial development in the region.

Findings Summary

The analysis identified a total of 23 parcels that fit into one of four categories for development potential. These parcels add up to approximately 457 acres. Approximately 90% of all inventoried parcel acreage (19 out of 23 parcels) are in Category 4: *Active business use present* and have a lower likelihood of redevelopment. Additionally, 43% of parcels (10 of the 23 parcels inventoried) are impacted by environmental constraints such as steep terrain, wetlands, and flood hazard zones. There are two parcels in the most promising category (Category 1: *Development-ready*), both owned by Clackamas County Development Agency (parcels 1 and 2). Mackenzie put additional consideration into development potential for these two parcels, including re-grouping the bisected and disconnected parcel segments and aggregating the parcel segments with adjacent smaller parcels under the same ownership to create two potential development-ready parcels.

The following section shares a summary of the methodology and findings of this analysis. More technical information and findings, along with the maps, can be found in the below appendices:

- Appendix 1 – Spreadsheet summary of inventoried parcels
- Appendix 2 – Map package of inventoried parcels
- Appendix 3 – County wide map of inventoried parcels

Methodology Summary

To complete this analysis, Mackenzie utilized Geographic Information System (GIS) data from Clackamas County and Metro Regional Land Information System (RLIS). Clackamas County provided a dataset with all industrially zoned parcels of 5 acres or larger in the unincorporated areas of the County, which was created by County staff in the summer of 2025. There were 108 total parcels in this dataset, totaling 1,404 AC. Mackenzie reviewed each of these parcels to identify the parcels that were entirely vacant or were partially vacant but have at least 5 acres of contiguous vacant land. Parcels that were already fully in use were removed from analysis.

Additional spatial layers were added to the analysis, including Flood Hazard Zones, wetlands, and streams, which revealed significant development constraints on some parcels.⁴ Mackenzie also assembled additional details for each parcel, including identifying existing operations through internet searches and incorporating ownership (taxpayer) information and aerial photography. Discussions with Clackamas County staff about parcel context, surrounding uses, and (re)development potential helped further refine the list of parcels.

Based on this analysis, all parcels were placed into one of four categories:

⁴ Flood hazard zone data provided by FEMA. Wetland and stream data provided by Metro RLIS.

Category 1. Development-ready

- Vacant parcel, zoned for industrial development, without constraints (wetlands, floodplain, topography, etc.).
- Parcels in this category present no significant development constraints, have infrastructure at or near the property boundary, and entitlements are already in place or can be easily obtained.

Category 2. Developable with constraints

- Vacant parcel, zoned for industrial development, with some constraints (wetlands, floodplain, topography, etc.) that may or may not need to be mitigated prior to development.
- Parcels in this category could become viable for development within approximately three years, contingent upon addressing reasonable development constraints, securing necessary entitlements, and/or extending required public infrastructure.

Category 3. Unlikely to develop due to constraints

- Vacant parcel, zoned for industrial development, with significant constraints (wetlands, floodplain, topography, etc.), covering the majority of the parcels.
- Parcels in this category are significantly constrained, face challenges in obtaining entitlements, or are landlocked from viable public infrastructure. Examples include parcels with steep slopes, former quarry sites, or riverside locations with significant development restrictions.

Category 4. Active business use present

- Vacant or partially in use parcel owned by an existing business. Property may be partially in use by existing business or vacant but being held for future business needs/expansion.

Technical Analysis Findings

The analysis identified 23 industrially zoned parcels greater than 5 acres that are vacant, partially vacant, or have opportunity for expansion of nearby business operations. See Table 1 for a summary of results.

TABLE 1. INVENTORIED PARCEL OVERVIEW	
Number of Inventoried Parcels	23 AC
Range of Parcel Sizes	5-152 AC
Average Parcel Size	Roughly 20 AC
Average Parcel Size (Category 1-3)	11 AC
Median Parcel Size	11.50 AC

The summary of how all 23 parcels were categorized is shown in Table 2.

TABLE 2. PARCEL CATEGORIZATION SUMMARY		
Category	Number of Parcel	Total Parcel Area (AC)
Category 1 (Development-ready)	2	Roughly 20
Category 2 (Developable with constraints)	0	0
Category 3 (Unlikely to develop due to constraints)	2	Roughly 23.5
Category 4 (Active business use present)	19	Roughly 413
Total	23	Roughly 455

There were two parcels in Category 1, meaning only two parcels stand out as being vacant and development ready. These two parcels are further analyzed in the subsequent section. Additionally, of the +/-455 total acres in all categories, approximately 413 acres are in Category 4 (Active business use present). Furthermore, eight of these parcels in Category 4 are heavily impacted by flood hazard zones and/or wetlands.

Only one of the parcels identified in this analysis is considered “vacant” in Metro’s Buildable Land Inventory (BLI) from the 2024 Urban Growth Report Regional Forecast. This one parcel is Parcel #3, a 12-acre parcel owned by Clackamas River Water District that has significant environmental constraints (steep terrain and majorly impacted by flood hazard zones).

Table 3 presents more information about each of the 23 inventoried parcels, including the parcels impacted by environmental constraints. See Appendix 1 for more detailed parcel inventory spreadsheet with addresses and parcel numbers and Appendix 2 for more detailed parcel maps with contours and flood hazard zones.

TABLE 3. OVERVIEW OF INDIVIDUAL INVENTORIED PARCELS

Parcel Number	Gross Parcel Acreage	Owner/Taxpayer	City	Active Business Use	Topography and/or Environmental Constraints	Category
1	7.71	Clackamas County Development Agency	Clackamas			1
2	12.68	Clackamas County Development Agency	Clackamas			1
3	12.08	Clackamas River Water Dist.	Clackamas		✓	3
4	11.55	Clackamas Education Service District	Clackamas		✓	3
5	8.3	North Clackamas Parks & Rec. Dist.	Portland	✓	✓	4
6	5.44	Spitznagel Family LLC	Clackamas	✓		4
7	13.72	Tyler Family Limited Partnership	Boring	✓		4
8	8.59	Smith Larry D Trustee	Boring	✓		4
9	5.61	MVGD LLC	Clackamas	✓		4
10	7.93	Eagle Foundry Co.	Eagle Creek	✓		4
11	22.81	Eagle Foundry Co.	Eagle Creek	✓		4
12	6	Mckee Holdings II LLC	Eagle Creek	✓	✓	4
13	5	Day Portland Building LLC	Eagle Creek	✓	✓	4
14	7.01	Day Portland Building LLC	Eagle Creek	✓		4
15	62.03	Glacier Northwest Inc	Canby	✓	✓	4
16	17.48	Glacier Northwest Inc	Canby	✓	✓	4
17	10.17	B & Co Properties LLC	Canby	✓	✓	4
18	15.56	Canby Sand & Gravel Co	Canby	✓	✓	4
19	15.52	Fip Master Funding XIV LLC	Mulino	✓	✓	4
20	8.11	Sanders Wood Products Inc	Molalla	✓		4
21	25.26	Sanders Wood Products Inc	Molalla	✓		4
22	152.64	Sanders Wood Products Inc	Molalla	✓		4
23	16.23	Pacific Fibre Products Inc	Molalla	✓		4

Further Analysis of Category 1 Parcels

The two parcels that are in Category 1 (development-ready) are owned by the Clackamas County Development Agency. These two parcels are made up of irregular and disconnected segments which are also bisected by Highway 224. To better understand development potential for this area, Mackenzie examined what would happen if parts of the parcels were re-grouped, creating two parcels: Parcel 1 could be made up of the parcel segments on the east side of Highway 224 and Parcel 2 could be made up of the parcel segments on the west side of Highway 224. Next, Mackenzie examined aggregating the parcels with additional adjacent industrially zoned parcels with shared ownership that had not been included in the previous analysis because they are smaller than 5 acres. With the addition of these smaller parcels, the approximate size of hypothetical Parcel 1 is 9.38 AC and the approximate size of hypothetical Parcel 2 is 12.66 AC. Property line adjustments are necessary to deliver these as graphically shown.

The parcel aggregation of each new potential aggregated site is detailed in Table 4 and 5 and graphically depicted in Appendix 2.

TABLE 4. PARCEL 1 AGGREGATION Parcel Segments <u>East</u> of Highway 224			
Parcel Segment Number	Assessor Parcel Number (APN)	Parcel Segment Area (AC)	Included in Original Inventory Analysis
1a	22E09A 00800	6.41	✓
1b	22E09AB 00100	1.55	✓
1c	22E09AB 00100	0.78	✓
1d	22E09A 00101	0.64	
Total Parcel 1 AC:		9.38	
TABLE 5. PARCEL 2 AGGREGATION Parcel Segments <u>West</u> of Highway 224			
Parcel Segment Number	Assessor Parcel Number (APN)	Parcel Segment Area (AC)	Included in Original Inventory Analysis
2a	22E09AB 00100	9.82	✓
2b	22E09AB 00100	0.52	✓
2c	22E09A 00800	1.3	✓
2d	22E09AB 00200	0.61	
2e	22E09A 00101	0.41	
Total Parcel 2 AC:		12.66	

Conclusion

After reviewing approximately 1,404 AC of industrially zoned parcels greater than 5 acres throughout unincorporated Clackamas County, Mackenzie identified 20.39 AC of development-ready land (Category 1), representing approximately 1.45% of all land studied. These 20.39 AC of developable land are all located on two nearby parcels (Parcel 1 and Parcel 2), both owned by Clackamas County Development Agency.

More detailed analysis of these Category 1 parcels led Mackenzie to examine aggregating the parcels with adjacent parcels under shared ownership that were less than 5 acres (and therefore not included in original inventory analysis). This aggregation could add approximately 1.66 AC, for a total of 22.05 AC of development-ready land (Category 1), representing approximately 1.57% of studied land.

III. CHAPTER 2: ECONOMIC OPPORTUNITY ANALYSIS (EOA) SUMMARY

Purpose

Mackenzie's review of industrially zoned parcels greater than 5 acres in unincorporated Clackamas County yielded limited opportunities for industrial development. Given these findings in *unincorporated* Clackamas County, the next phase of this work was to investigate employment lands in *incorporated* Clackamas County.

To do this, Mackenzie reviewed Economic Opportunity Analyses (EOAs) for 10 cities within Clackamas County: Estacada; Lake Oswego; Milwaukie; Canby; Happy Valley; Molalla; Sandy; Tualatin; West Linn; and Wilsonville. Findings from each city's Buildable Land Inventory (BLI) were extracted to compare and aggregate the buildable land available for industrial and commercial uses (vacant and redevelopable), as well as the forecasted land demand in the EOAs, and the resulting surplus or deficit for each city.

The following section discusses the findings of this analysis along with data visualizations of these findings. More technical information on the methodology and findings can be found in the appendices:

- Appendix 4 – EOA Summary and Analysis Matrix
- Appendix 5 – EOA Summary Methodology and Assumptions

Findings

This analysis illustrates that there is a wide range of forecasted land needs for cities within Clackamas County, with some cities forecasted to have surpluses of hundreds of acres (e.g., Estacada), and other cities forecasted to have deficits of hundreds of acres (e.g., Milwaukie and Canby).

Countywide Analysis

Mackenzie summed up the total buildable land for both commercial and industrial land for all the cities within Clackamas County, resulting in a total of 2,051 acres (AC) of buildable industrial land and 627 AC of buildable commercial land. After accounting for the three cities that are in Clackamas County but are also a part of another county, the adjusted total by share of cities' area within Clackamas County is 1,404 AC of buildable industrial land, and 601 AC of buildable commercial land. (The methodology for accounting for multi-county cities is detailed in Appendix 5.)

Combining the forecasted needs for each of the cities resulted in overall deficits for both industrial and commercial land: a deficit of 194 AC of industrial land and a deficit of 169 AC of commercial land across the cities within Clackamas County.⁵ After accounting for multi-county cities, the adjusted overall deficits by share of cities' area within Clackamas County are a deficit of 841 AC of industrial land, and a deficit of 196 AC of commercial land.

The findings are summarized in Table 6 below, and the full analysis can be found in Appendix 2.

⁵ Goal 9 does not have a required method for employment forecasting. Each city has different approaches to forecasting demand scenarios, creating difficulty in direct comparison. Professional judgement was used to select the most similar forecast for each city for this analysis, selecting the forecasts based on OED employment growth trends and industry trends, or whatever forecast was available when only one was provided. The process for selecting comparable scenarios is detailed in Appendix 5.)

TABLE 6. COUNTYWIDE ANALYSIS	
Summary of all cities within Clackamas County, as entire city and by share of area within Clackamas County.	
Total acreage of buildable industrial land	
By share of cities' area within Clackamas County	1,404 AC
Entire cities	2,051 AC
Total acreage of buildable commercial land	
By share of cities' area within Clackamas County	601 AC
Entire cities	627 AC
Reconciliation: Surplus (+) or Deficit (-)	
Industrial	
By share of cities' area within Clackamas County	-841AC
Entire cities	-194 AC
Commercial	
By share of cities' area within Clackamas County	-196 AC
Entire cities	-169 AC

Subtotals

Given the variation of cities across Clackamas County – in size, location, and character – the findings were divided into three groups. Tables 7, 8, and 9 show subtotals of these three groupings, with subtotals of acreage of buildable industrial and commercial land, and the subtotals of the surplus or deficit this group of cities face given industrial and commercial land demand.

The first group, “Small Cities,” includes Estacada, Canby, Molalla, and Sandy which are all outside of the Metro boundary. The second group, “Inside Metro,” includes Milwaukie, Happy Valley, and West Linn, which are within the Metro boundary. The third group, “Multi-County Cities,” includes Lake Oswego, Tualatin, and Wilsonville, which are all part of two counties, and therefore need an additional layer of analysis.

TABLE 7. SMALL CITIES (OUTSIDE OF METRO) SUBTOTAL	
Summary of Estacada, Canby, Molalla, and Sandy	
Total acreage of buildable industrial land	761 AC
Total acreage of buildable commercial land	308 AC
Reconciliation: Surplus (+) or Deficit (-)	
Industrial	0 AC
Commercial	+122 AC

TABLE 8. INSIDE METRO SUBTOTAL	
Summary of Milwaukie, Happy Valley, West Linn	
Total acreage of buildable industrial land	230 AC
Total acreage of buildable commercial land	122 AC
Reconciliation: Surplus (+) or Deficit (-)	
Industrial	-483 AC
Commercial	-150 AC

TABLE 9. MULTI-COUNTY SUBTOTAL	
Summary of Lake Oswego (95% of area is within Clackamas County) Tualatin (9% of area is within Clackamas County) Wilsonville (89% of area is within Clackamas County)	
Total acreage of buildable industrial land	
By share of cities' area within Clackamas County	413 AC
Entire cities	1,060 AC
Total acreage of buildable commercial land	
By share of cities' area within Clackamas County	171 AC
Entire cities	197 AC
Reconciliation: Surplus (+) or Deficit (-)	
Industrial	
By share of cities' area within Clackamas County	-358 AC
Entire cities	+771 AC
Commercial	
By share of cities' area within Clackamas County	-167 AC
Entire cities	-141 AC

City by City Summaries

- **Estacada (EOA completed in 2019 through forecast year 2038):** Approximately 370 AC of buildable industrial land and 100 AC of buildable commercial land. Despite the city seeing growth, there is projected to be surpluses of over 300 AC of industrial land, and surpluses of between 85 and 100 AC of commercial land.
- **Lake Oswego (EOA completed in 2013 through forecast year 2035):** Approximately 39 AC of buildable industrial land and 120 AC of buildable commercial land. Forecasted to have surplus of approximately 35 AC of industrial land and between 77 and 100 AC of commercial land in low and medium growth scenarios, but deficits of 32 AC of industrial land and 68 AC of commercial land in the high growth scenario.
 - 5% of Lake Oswego's area (land mass) is located within Multnomah County. After accounting for only 95% of Lake Oswego being within Clackamas County, the adjusted buildable industrial land by share of area within Clackamas County is 36 AC of industrial land and 113 AC of commercial land. The approach to accounting for multi-county cities is detailed in Appendix 5.
- **Milwaukie (EOA completed in 2017, but City generated updated data in 2026 for this analysis, through projected year 2035):** Approximately 12 AC of buildable industrial land and 14 AC of buildable commercial land. City is projected to have significant deficits of between 576 and 593 AC of industrial land and between 158 and 239 AC of commercial land.

- **Canby (EOA completed in 2023 through forecast year 2043):** Approximately 163 AC of buildable industrial land and 16 AC of buildable commercial land. City is projected to have deficits of between 81 and 474 AC of industrial land and between 4 and 8 AC of commercial land. Canby is currently under evaluation for an Urban Growth Boundary (UGB) expansion.
- **Happy Valley (EOA completed in 2011 through forecast year 2035):** Approximately 207 AC of buildable industrial land and 76 buildable commercial land. City is projected to have a surplus of industrial land between 91 and 152 AC. City is projected to have surplus of commercial land in low and medium growth scenarios (between 3 and 21 AC), but a 16 AC deficit of commercial land in the high growth scenario.
- **Molalla (EOA completed in 2025 through forecast year 2045):** Approximately 175 AC of buildable industrial land, and 55 AC of buildable commercial land. City is projected to have a 97 AC surplus of industrial land, and a 15 AC deficit of commercial land. Molalla is currently under evaluation for an Urban Growth Boundary (UGB) expansion.
- **Sandy (EOA completed in 2024 through forecast year 2044):** Approximately 54 AC of buildable industrial land and 142 AC of buildable commercial land. City is projected to have a deficit of 9 AC of industrial land and a 52 AC surplus of commercial land.
- **Tualatin (EOA completed in 2019 through forecast year 2040):** Approximately 668 AC of buildable industrial land and 15 AC of buildable commercial land. City is forecasted to have a slight deficit of 9 AC of industrial land, and a large deficit of 171 AC of commercial land.
 - 91% of Tualatin’s area is located within Washington County. After accounting for only 9% of Tualatin being within Clackamas County, the adjusted buildable industrial land by share of area within Clackamas County is 61 AC of industrial land and 1 AC of commercial land. The approach to accounting for multi-county cities is detailed in Appendix 5.
- **West Linn (EOA completed in 2016 through forecast year 2036):** Approximately 12 AC of buildable industrial land and 32 AC of buildable commercial land. City is forecasted to have a slight surplus of industrial land, between 0.5 and 8.5 AC, and a slight surplus of commercial land, between 5 and 7 AC.
- **Wilsonville (EOA completed in 2025 through forecast year 2046):** Approximately 353 AC of buildable industrial land and 63 AC of buildable commercial land. The city is projected to have a surplus of 32 AC of industrial land and a deficit of 47 AC of commercial land.
 - 11% of Wilsonville’s area is located within Washington County. After accounting for only 89% of Wilsonville being within Clackamas County, the adjusted buildable industrial land by share of area within Clackamas County is 315 AC of industrial land and 56 AC of commercial land. The approach to accounting for multi-county cities is detailed in Appendix 5.

Gladstone and Oregon City are not included in this analysis due to lack of publicly available data at the time of this report. Oregon City does not have an updated EOA that includes data that could be utilized in this analysis, similar to other jurisdictions. Oregon City’s BLI data is included in the project scope’s subtask 7, which uses data from Metro and is detailed in Chapter 3. The City of Gladstone EOA is from 1979, which was determined to be no longer relevant.

Data Visualizations

Buildable Land

*Part of city is located within a different county.

^Milwaukie’s EOA was completed in 2017, but their BLI methodology was re-run to produce updated data in 2026

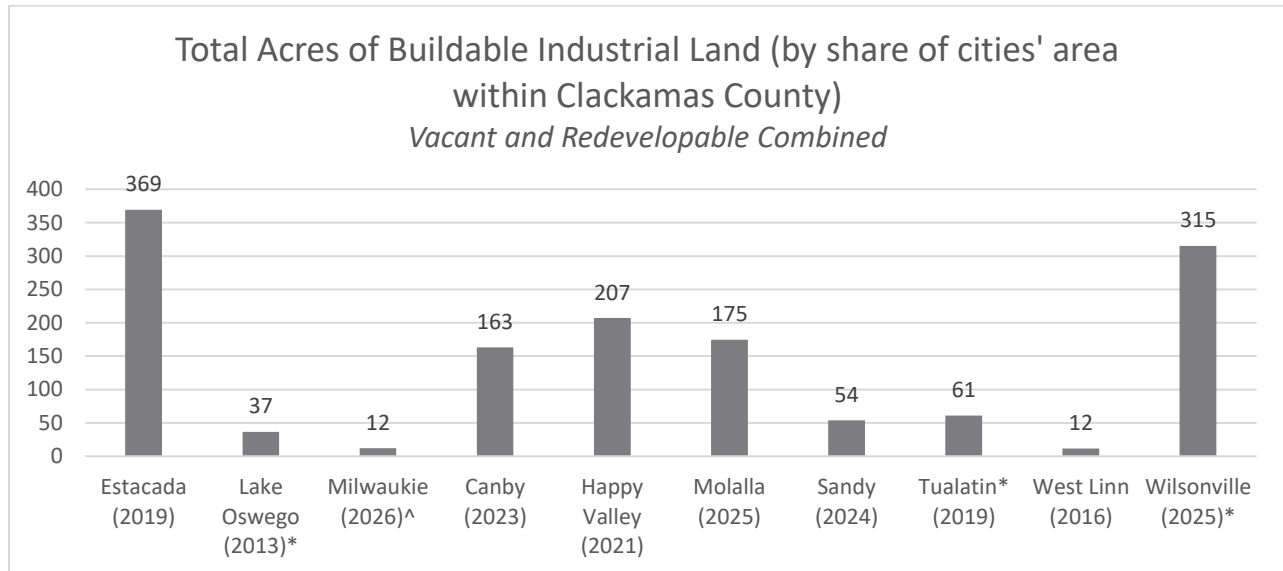


Figure 1. Total Acres of Buildable Industrial Land (by Share of Cities' Area within Clackamas County)

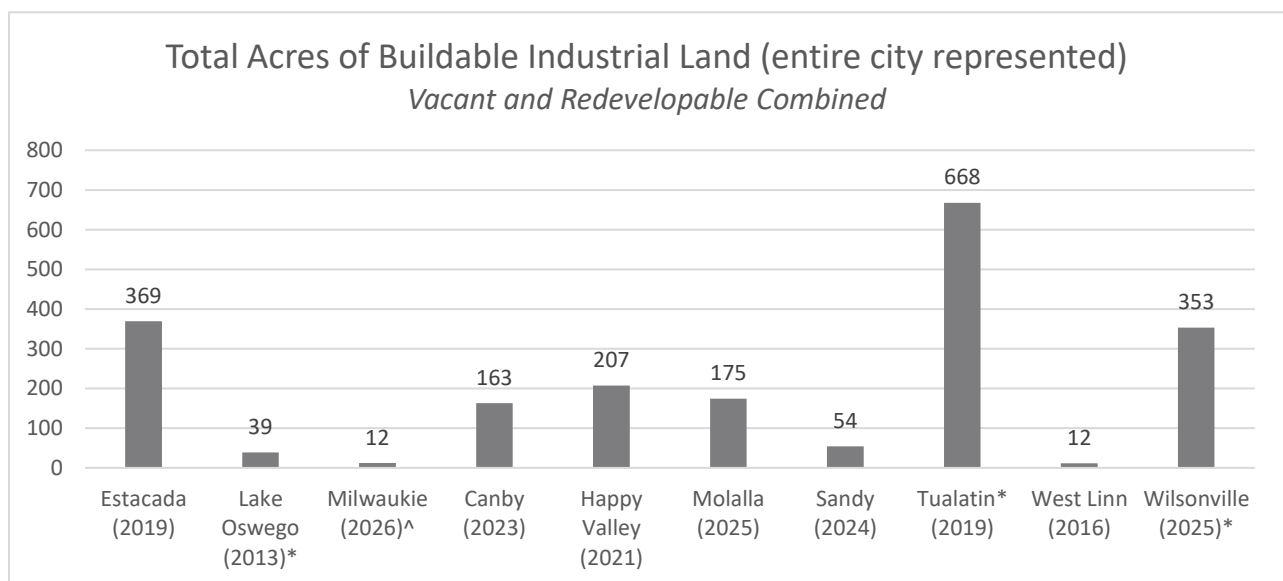


Figure 2. Total Acres of Buildable Industrial Land (Entire City Represented)

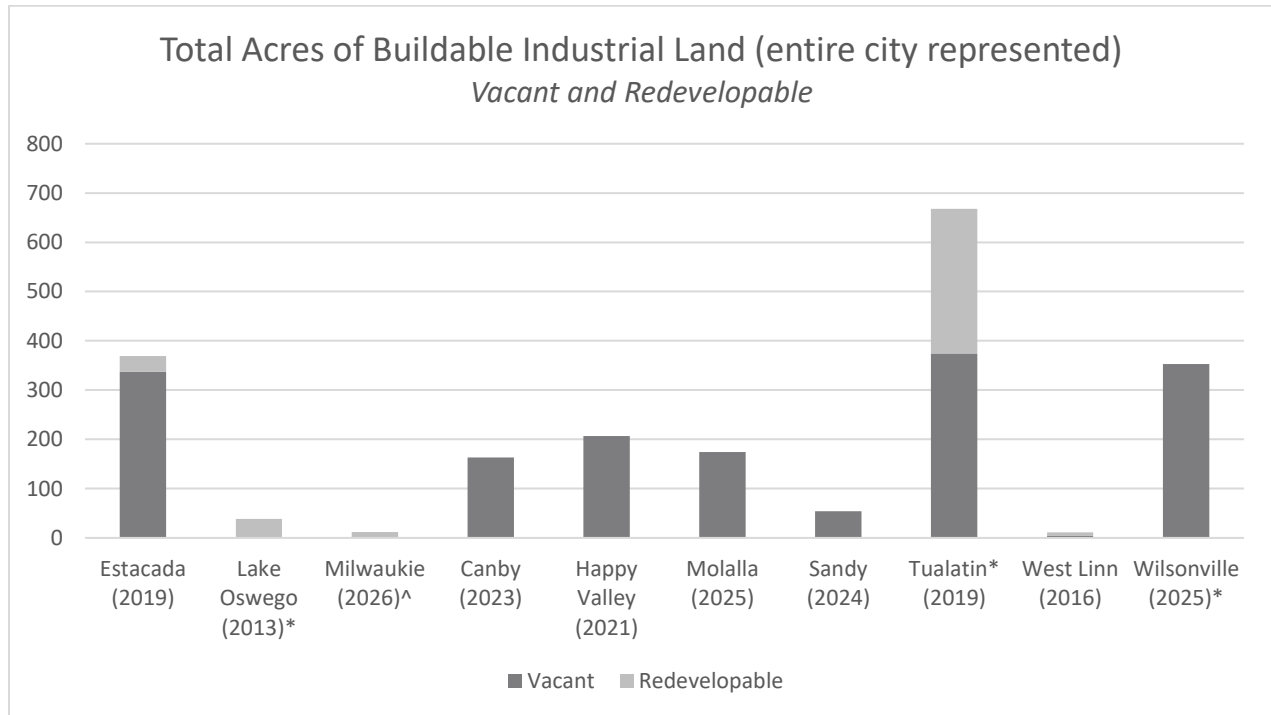


Figure 3. Total Acres of Buildable Industrial Land (Entire City Represented) by Status

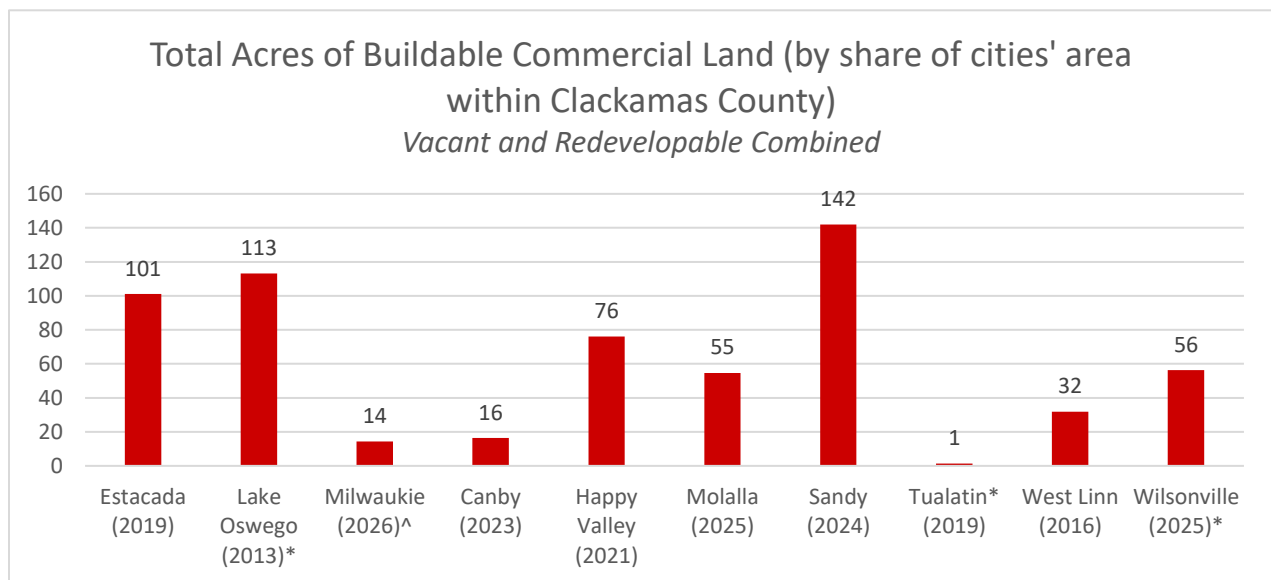


Figure 4. Total Acres of Buildable Commercial Land (by Share of Cities' Area within Clackamas County)

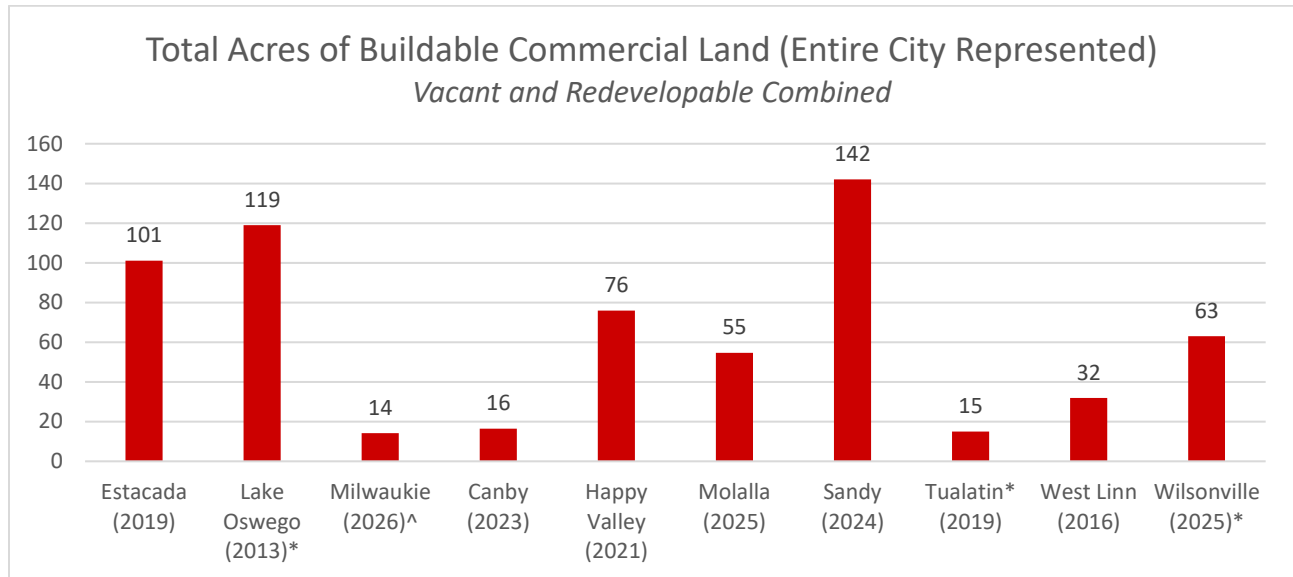


Figure 5. Total Acres of Buildable Commercial Land (Entire City Represented)

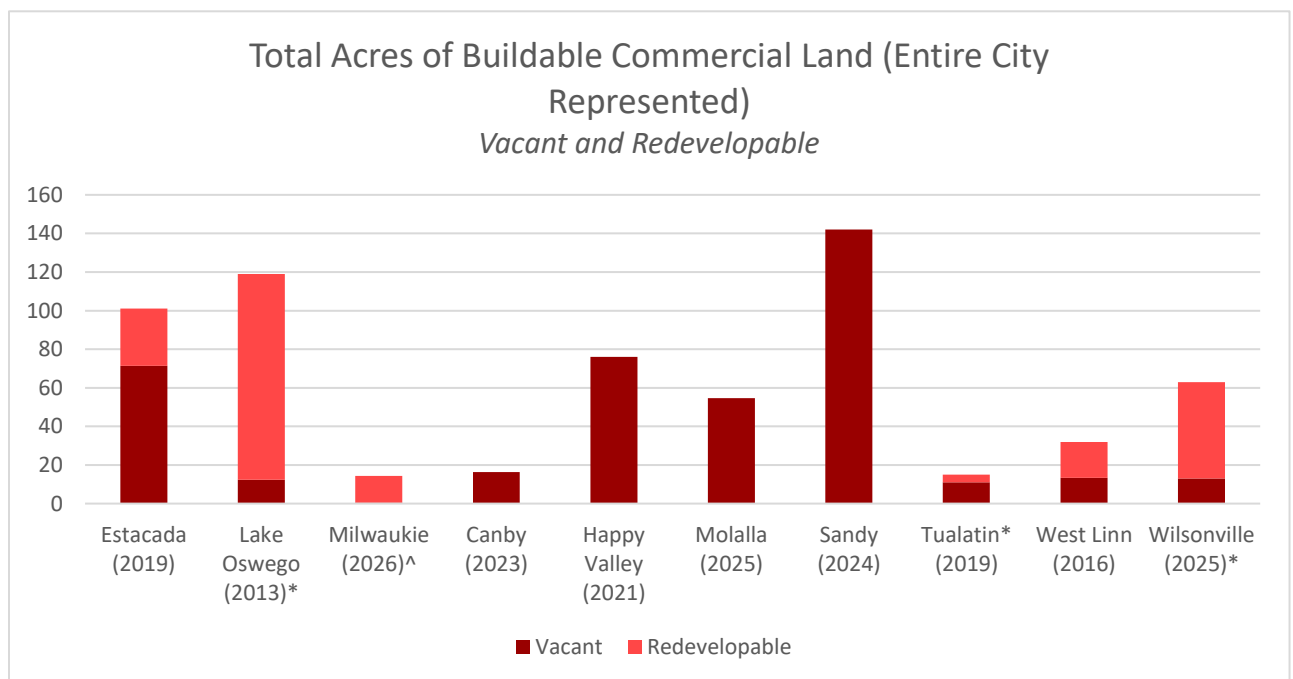


Figure 6. Total Acres of Buildable Commercial Land (Entire City Represented) by Status

Land Demand

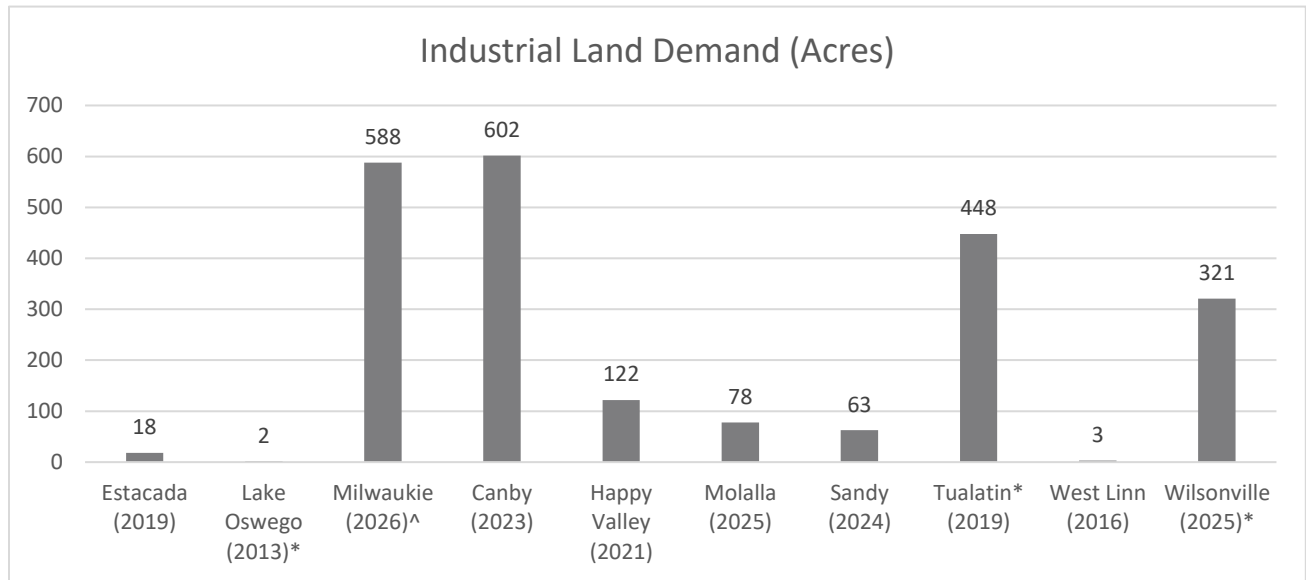


Figure 7. Industrial Land Demand (Acres) by City

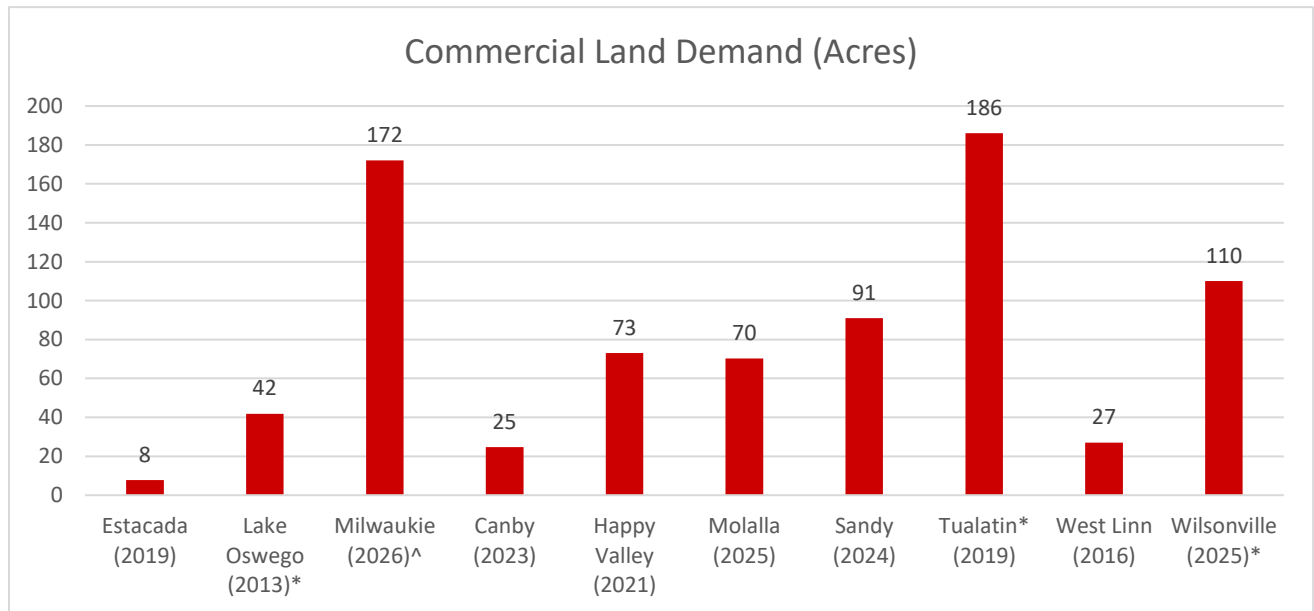


Figure 8. Commercial Land Demand (Acres) by City

Reconciliation

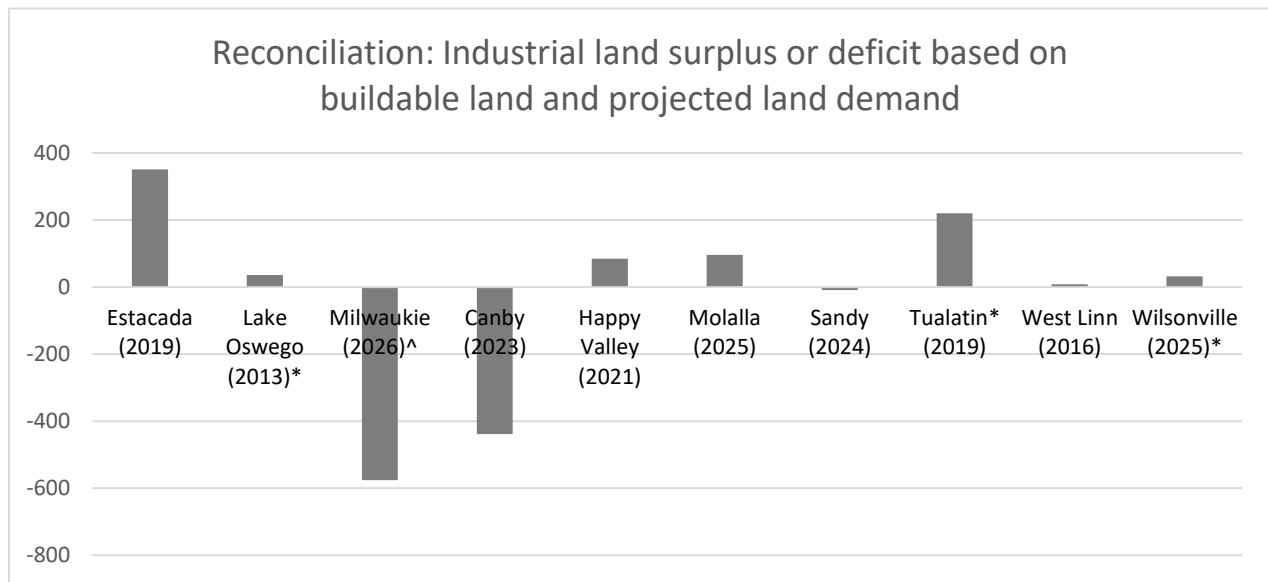


Figure 9. Reconciliation: Industrial Land Surplus or Deficit

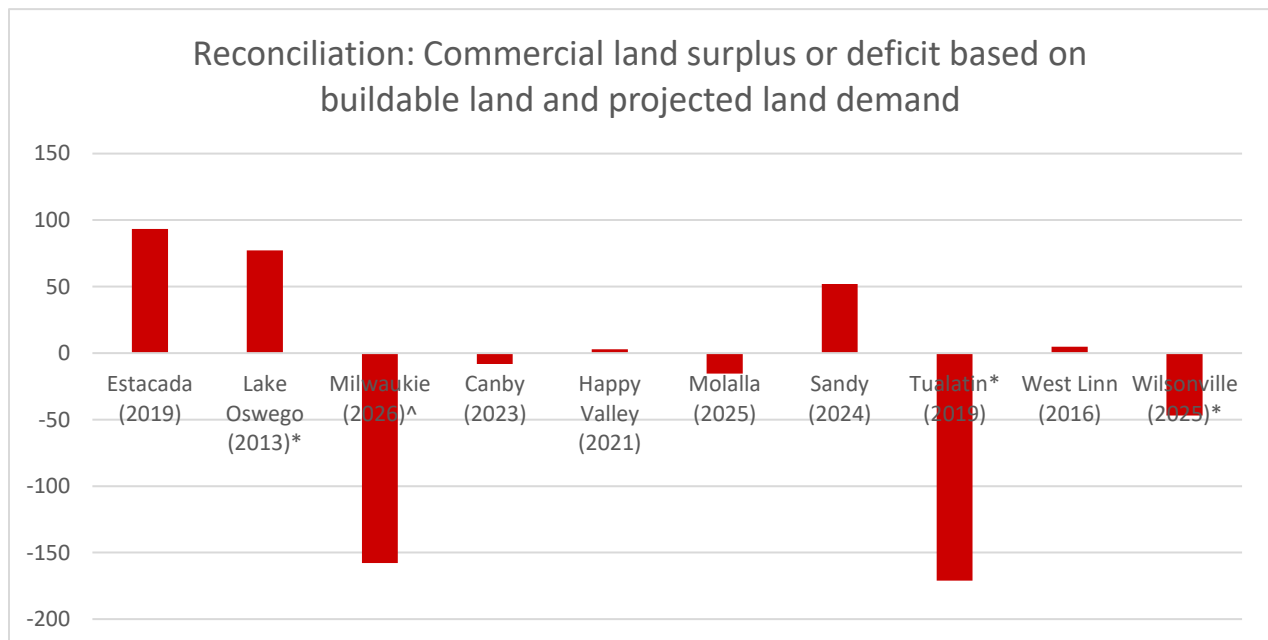


Figure 10. Reconciliation: Commercial Land Surplus or Deficit

IV. CHAPTER 3: BUILDABLE LAND INVENTORY (BLI) MAPPING AND ANALYSIS

Purpose

After reviewing and analyzing the Economic Opportunity Analysis (EOAs) for ten cities within Clackamas County and summing up the supply, demand, and surplus/deficit of employment land throughout these ten cities, Mackenzie mapped the Buildable Land Inventories (BLI's) to further analyze and illustrate the buildable employment land. The purpose of this analysis is to further the economic development objectives of Clackamas County through providing an analysis of buildable employment land within Canby, Estacada, Gladstone, Happy Valley, Johnson City⁶, Lake Oswego, Milwaukie, Molalla, Oregon City, Sandy, Tualatin, West Linn, and Wilsonville. Only the portions of Lake Oswego, Tualatin, and Wilsonville within Clackamas County have been studied in this analysis.

To do so, Mackenzie identified the status of buildable employment land as vacant, partially vacant/infill, and redevelopable based on data from Metro and the jurisdictions outside Metro. Important attributes such as parcel size and zoning classification were recorded. Additionally, to highlight potential impact of parcel aggregation, Mackenzie identified parcels which may be suitable candidates for aggregation based on shared property boundaries in order to create larger development sites.

Importantly, the land in the Buildable Employment Land (BLI) datasets includes industrial, commercial, and mixed use and is considered “buildable,” but not necessarily “development-ready.” “Buildable Land” may have one, or more barriers to development (e.g. infrastructure availability). This should be taken into account when considering site suitability and development feasibility.

Additionally, this analysis does not include land in unincorporated Clackamas County, because the County does not have an Economic Opportunity Analysis (EOA), however, Metro's Buildable Land Inventory (BLI) does include urban and unincorporated areas within Metro's jurisdiction. See the first chapter of this report for an analysis of available industrially zoned parcels over 5 acres in unincorporated Clackamas County. The second chapter of this report analyzed the EOAs for jurisdictions within Clackamas County, taking into account forecasted needs and subsequent deficits and surpluses. Due to the lack of a County EOA, a next project phase may include an investigation of commercial and mixed use inventory in unincorporated Clackamas County, which would be a more robust county-wide perspective of available and buildable land inventories.

The following section shares both a summary of the key findings and a more detailed discussion of the technical findings along with recommended next steps. The map package and more technical information on the methodology can be found in the below appendices:

- Appendix 6 – Map package of BLI by jurisdiction
- Appendix 7 – BLI Mapping Methodology and Assumptions

Findings Summary

- The analyzed jurisdictions have approximately 930 parcels of buildable employment land (commercial, industrial, and mixed use).

⁶ No buildable employment land parcels were identified by Metro in Johnson City and Tualatin (the portion of the City within Clackamas County). Therefore, these two jurisdictions have not been included in further steps of this study.

- Approximately 68% of the identified parcels are smaller than 1 acre in size and another 22% are in the 1-4.99-acre size range, meaning fewer than 10% of the analyzed parcels are larger than 5 acres. These 5 acres and larger parcels (89 total) make up more than 1,000 acres of the 1,700 acres identified in this report.
- As shown in Figure 11, below, approximately 66% of the identified buildable employment land is located within the four jurisdictions outside of Metro (Canby, Estacada, Molalla, and Sandy).
- Within Metro, Happy Valley, Oregon City, and Wilsonville each have over 100 acres of identified buildable employment land, with most parcels, 276 out of 373 (74%), smaller than 1 acre.
- The average parcel size of all identified parcels is 1.7 acres, and the median parcel size is 0.25 acres.
- In total, the analyzed jurisdictions have approximately 1,700 acres of buildable employment land (commercial, industrial, and mixed use).
 - Approximately 75% of the 1,700 buildable employment land acreage is found in the jurisdictions' industrial zones (not commercial or mixed use).
- The largest parcel of all identified parcels is approximately 50 acres, and the largest site (after aggregating parcels) is approximately 94 acres. Both the largest parcel and largest site are located in Estacada (notably, these parcels are not impacted by the 2023 rezone).⁷ Although this study found one site greater than 100 AC (103 AC in Estacada), the site was rezoned in 2023 and is now less than 100 AC in size.
- This analysis found 17 parcels within the incorporated cities of Clackamas County that are larger than 20 acres. Parcel aggregation could result in 8 additional sites over 20 acres.
- Of the 5,800 acres of employment land identified by Metro in the 2024 Urban Growth Report, approximately 1,300 acres (22%) are within the Clackamas County Metro jurisdictions.

Data and Methodology Considerations

- For the jurisdictions in Metro, much of the employment land is impacted by one or more environmental constraints, including slope, wetlands, or floodplain. However, the acreage figures in this analysis are the net unconstrained acres after removal of the constrained areas.
- Many jurisdictions use different criteria to classify land as vacant, partially vacant/infill, or redevelopable. This presents a challenge when comparing jurisdictions evenly. These classifications are explained in the methodology appendix (Appendix 7) as reference.
- This analysis is a snapshot in time, with source data from different years, ranging from 2019 to 2025. Therefore, the status of parcels may be outdated and not reflective of current parcel status, due to the age of the best available data used in this report.

Figure 11 below summarizes the total buildable employment land for each jurisdiction analyzed.

⁷ This analysis uses the City of Estacada's BLI, which was completed in 2019. In 2023, approximately 100 acres of Industrial land in the City of Estacada was rezoned to residential and an additional 100 acres of industrial land was redesignated for commercial and mixed-use. Accordingly, 100 acres of Employment land should be subtracted from the total acreage presented in this report.

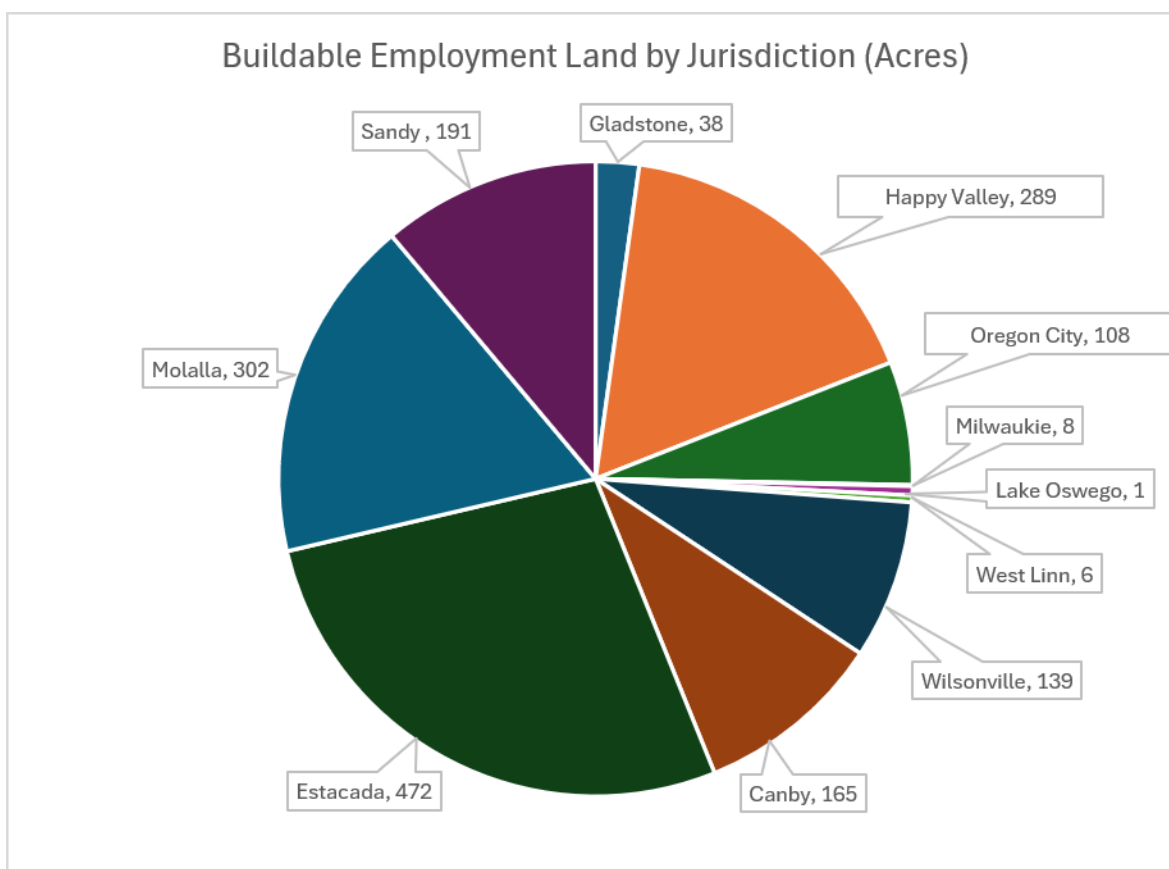


Figure 11. Buildable Employment Land by Jurisdiction

Technical Analysis Findings

Mackenzie analyzed employment land supply data for 13 jurisdictions to provide detailed findings regarding the inventory of buildable lands for the incorporated jurisdictions in Clackamas County. The source of the buildable employment land data for Gladstone, Happy Valley, Johnson City⁸, Lake Oswego, Milwaukie, Oregon City, Tualatin, West Linn, and Wilsonville was the 2024 Metro Buildable Lands Inventory, provided by Metro. The source of buildable employment land data for Canby (2023), Estacada (2019), Molalla (2025), and Sandy (2024), was each City's respective Buildable Land Inventory (dates provided in parentheses), provided by Clackamas County. Refer to Appendix 7 for further details on methodology and assumptions.

The initial step in the analysis was to filter Geographic Information System (GIS) data to identify parcel status as vacant, partially vacant/infill, and redevelopable. This analysis focused on parcels with employment zoning designations, including mixed use since office development is allowed in most mixed-use zones.

Once parcel status was analyzed, Mackenzie tabulated the acreage by zone classification and parcel size. Additionally, in situations where a parcel had a shared property line of over approximately 100' with another parcel, these parcels were aggregated into sites to illustrate how parcel aggregation could impact

⁸ No buildable employment land parcels were identified by Metro in Johnson City and Tualatin (the portion of the City within Clackamas County). Therefore, these two jurisdictions have not been included in further steps of this study.

the supply of employment lands. Parcel aggregation did not take into consideration ownership, access, or infrastructure, or other development related requirements.

Technical findings are summarized in charts and detailed in the tables and figures below. Additionally, Appendix 6 contains a series of maps and tables showing the vacant, partially vacant/infill, and redevelopable sites in the studied jurisdictions.

Parcel and Site Size Distribution

To provide a more complete picture of the County's buildable employment land's development potential, Mackenzie sorted the identified parcels and sites into the following acreage size ranges to see the distribution of parcel and site size:

- Smaller than 1 acre.
- 1-4.99 acres.
- 5-9.99 acres.
- 10-19.99 acres.
- Larger than 20 acres.

The findings of this analysis are provided in Table 10, below.

TABLE 10: EMPLOYMENT PARCEL AND SITE SIZE BY JURISDICTION (COUNT)								
		Acres	1<	1-4.99	5-9.99	10-19.99	>20	Total
Inside Metro	Gladstone	Parcels	31	0	0	0	1	32
		Sites	24	0	0	0	1	25
	Happy Valley	Parcels	112	28	13	3	3	159
		Sites	77	7	2	0	4	90
	Oregon City	Parcels	81	17	7	1	0	106
		Sites	57	4	1	2	2	66
	Lake Oswego	Parcels	14	0	0	0	0	14
		Sites	12	0	0	0	0	12
	Milwaukie	Parcels	34	3	0	0	0	37
		Sites	27	2	0	0	0	29
	West Linn	Parcels	17	3	0	0	0	20
		Sites	11	0	1	0	0	12
	Wilsonville	Parcels	83	19	3	0	3	108
		Sites	70	8	5	0	3	86
Inside Metro Subtotals		Parcels	372	70	23	4	7	476
		Sites	278	21	9	2	10	320
Outside Metro	Canby	Parcels	47	22	4	0	3	76
		Sites	18	13	5	1	2	39
	Estacada	Parcels	89	42	16	4	6	157
		Sites	26	9	2	1	6	44
	Molalla	Parcels	88	50	12	3	0	153
		Sites	27	12	5	3	5	52
	Sandy	Parcels	36	25	7	2	1	71
		Sites	16	8	1	2	2	29
Outside Metro Subtotals		Parcels	260	139	39	9	10	457
		Sites	87	42	13	7	15	164
Totals		Parcels	632	209	62	13	17	933
		Sites	365	63	22	9	25	484

Key Takeaways:

- As shown in Table 10, the analyzed jurisdictions have 933 parcels of buildable employment land (commercial, industrial, and mixed use) which can be aggregated into 484 sites.
- Approximately 68% of the identified parcels are smaller than 1 acre in size and another 22% are in the 1-4.99-acre size range, meaning fewer than 10% of the parcels are larger than 5 acres.
- There are several jurisdictions where most employment acreage (both parcels and sites) is in the 1 acre and smaller category (Gladstone, Lake Oswego, Milwaukie, and West Linn).
- This analysis found 17 parcels (fewer than 2%) within the incorporated cities of Clackamas County that are larger than 20 acres. Parcel aggregation could increase that number to 25.
- Often, mid-size parcels (5-9.99 and 10-19.99 acres) can be aggregated to achieve sites larger than 20 acres. Though this aggregation creates larger sites, it can lead to a reduction in the number of mid-size parcels.

- When aggregating adjacent parcels, more large sites were able to be created in only one category: 20 acres and larger (25 compared to 17). In the other acreage categories, site aggregation resulted in fewer sites compared to parcels as small parcels were aggregated with other smaller parcels, and barely resulting in a larger aggregated site. The aggregated sites were reduced by nearly 50% compared to individual parcels (484 versus 933). While this was expected, the difference in some jurisdictions is very large (Happy Valley, Oregon City, Wilsonville, Canby, Estacada, Molalla, and Sandy), meaning that property aggregation will be key to providing larger development sites.
- The average parcel size of all identified parcels is 1.7 acres, and the median parcel size is 0.25 acres. The largest parcel of all identified parcels is approximately 50 acres, and the largest site (after aggregating parcels) is approximately 94 acres. Both the largest parcel and largest site are located in Estacada (notably, these parcels are not impacted by the 2023 rezone).
- The share of buildable parcels that is smaller than 1 acre is higher for jurisdictions within Metro (between 70% to 100%) than for jurisdictions outside of Metro (between 51% to 62%).
- In jurisdictions where site aggregation yielded a large reduction in the number sites (compared to individual parcels), this indicates the jurisdiction has a highly parcelized employment land base. Accordingly, parcel aggregation may have more impact in these jurisdictions.

Employment Land Acreage

TABLE 11: BUILDABLE EMPLOYMENT LAND BY JURISDICTION (ACRES)														
	Inside Metro								Outside Metro					
	Gladstone	Happy Valley	Oregon City	Lake Oswego	Milwaukie	West Linn	Wilsonville	Inside Metro Subtotal	Canby	Estacada	Molalla	Sandy	Outside Metro Subtotal	Total
Commercial	1	0	12	0	0	0	6	19	13	101	91	137	342	361
Vacant	1	0	0	0	0	0	4	5	11	61	54	53	178	183
Partially Vacant/ Infill	0	0	11	0	0	0	0	11	0	11	37	85	132	143
Redevelopable	0	0	1	0	0	0	2	3	2	30	0	0	32	35
Industrial	37	273	86	0	8	6	133	543	152	371	211	54	788	1,331
Vacant	0	180	28	0	1	3	47	259	112	212	131	23	479	738
Partially Vacant/ Infill	37	92	56	0	7	1	86	279	30	126	80	30	267	546
Redevelopable	0	1	2	0	1	1	0	5	9	32	0	0	41	46
Mixed Use	0	16	10	1	0	0	0	27	n/a	n/a	n/a	n/a	n/a	27
Vacant	0	16	10	1	0	0	0	27	n/a	n/a	n/a	n/a	n/a	27
Partially Vacant/ Infill	0	0	0	0	0	0	0	0	n/a	n/a	n/a	n/a	n/a	0
Redevelopable	0	0	0	0	0	0	0	0	n/a	n/a	n/a	n/a	n/a	0
Total	38	289	108	1	8	6	139	589	165	472	302	191	1130	1,719

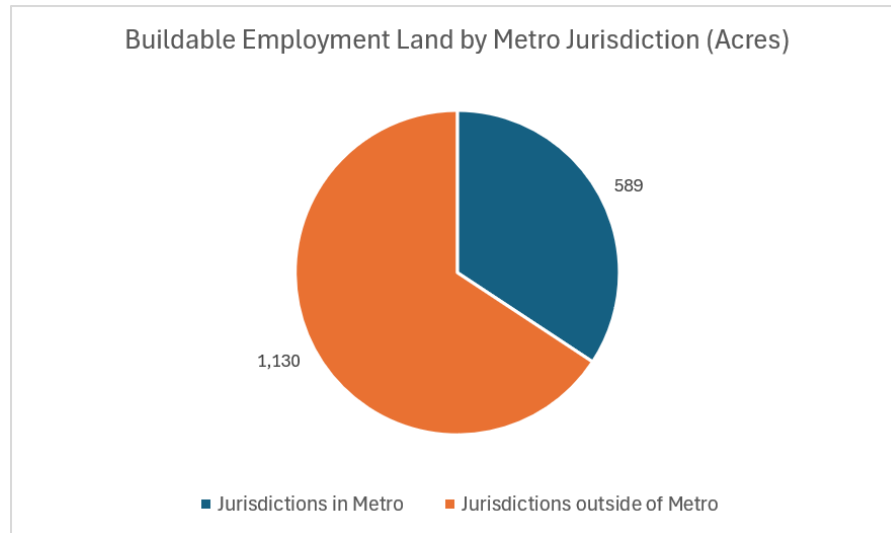


Figure 12. Buildable Employment Land by Metro Jurisdiction (Acres)

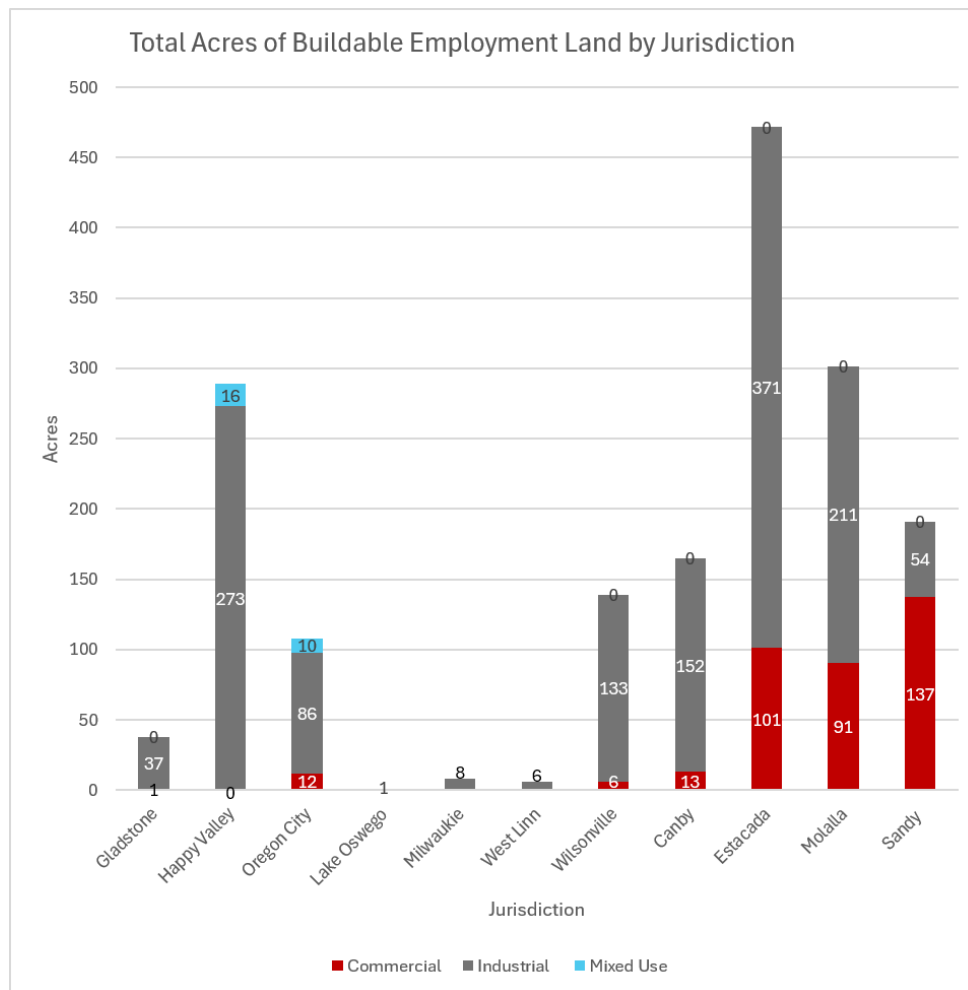


Figure 13. Total Acres of Buildable Employment Land by Jurisdiction

Key Takeaways:

- As shown in Table 11, the analyzed jurisdictions have 1,719 acres of buildable employment land (commercial, industrial, and mixed use).⁹
- Over 75% of the buildable employment land acreage (1,331) is found in the jurisdictions' industrial zones and approximately 20% is found in the commercial zones. Mixed use zones were the remaining 1.5%.
- As shown in Figure 12, approximately 66% of the identified buildable employment land is located within the four (4) jurisdictions outside of Metro (Canby, Estacada, Molalla, and Sandy).
 - As shown in Figure 14 and Figure 15, approximately 60% of identified 1,331 AC of buildable *industrial* land is located within the four (4) jurisdictions outside of Metro (Canby, Estacada, Molalla, and Sandy).
 - As shown in Figure 16 and Figure 17, approximately 95% of identified 361 AC of buildable *commercial* land is located within the four jurisdictions outside of Metro (Canby, Estacada, Molalla, and Sandy).
- Within Metro, Happy Valley, Oregon City, and Wilsonville each have over 100 total acres of identified buildable employment land. The average parcel sizes range from 1 to 1.8 AC.

Data and Methodology Considerations

- Many jurisdictions use different criteria to classify land as vacant, partially vacant, or redevelopable. This presents a challenge when comparing jurisdictions evenly/consistently/uniformly.
- This analysis is a snapshot in time. The status of parcels and sites are based on the most recent best available data, which ranges from 2019-2025. Given the age of the best available data, the current status may not be reflective of current conditions.
- The data provided indicates that much of the employment land is impacted by one or more environmental constraints, including slope, wetlands, or floodplain. However, the acreage figures in this analysis are the net unconstrained acres. The constrained land has been removed.

Figure 14 and Figure 15 below show the distribution of total *industrial* acres by jurisdiction for vacant, partially vacant, and redevelopable land.

⁹ This analysis uses the City of Estacada's BLI, which was completed in 2019. In 2023, approximately 100 acres of Industrial land in the City of Estacada was rezoned to residential and an additional 100 acres of industrial land was redesignated for commercial and mixed-use. Accordingly, 100 acres of Employment land should be subtracted from the total acreage presented in this report.

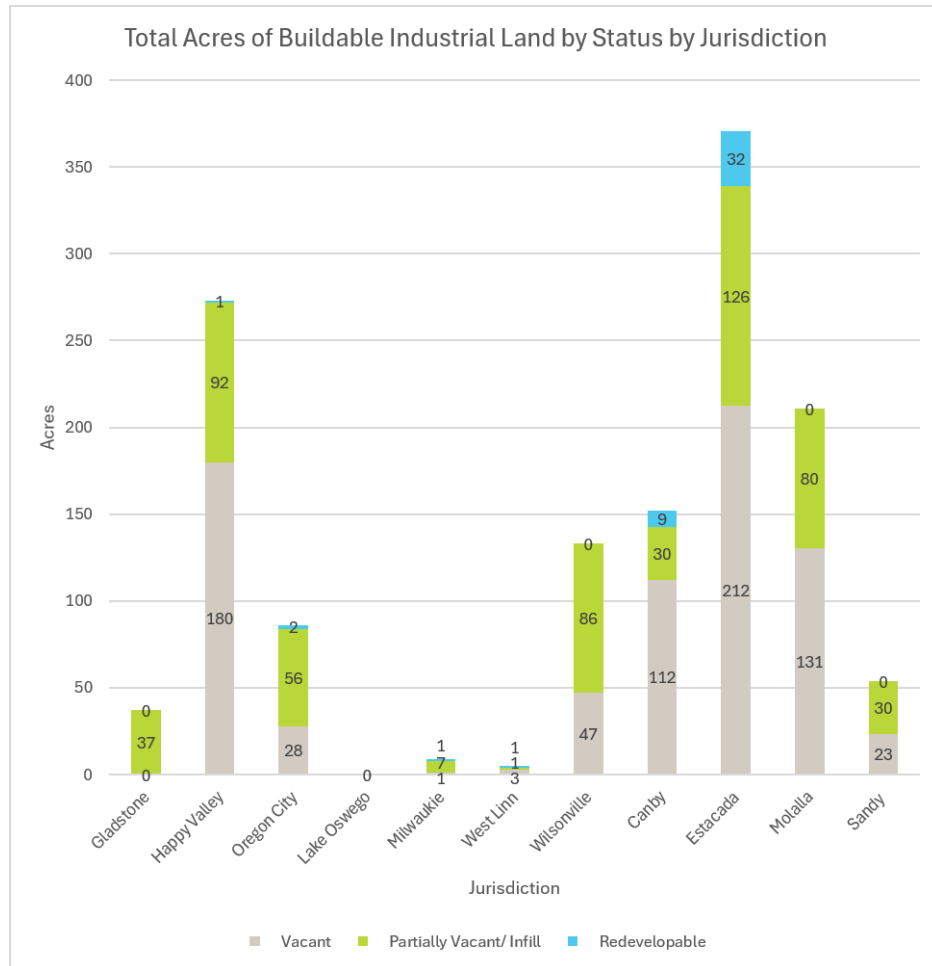


Figure 14. Total Acres of Buildable Industrial Land by Status by Jurisdiction

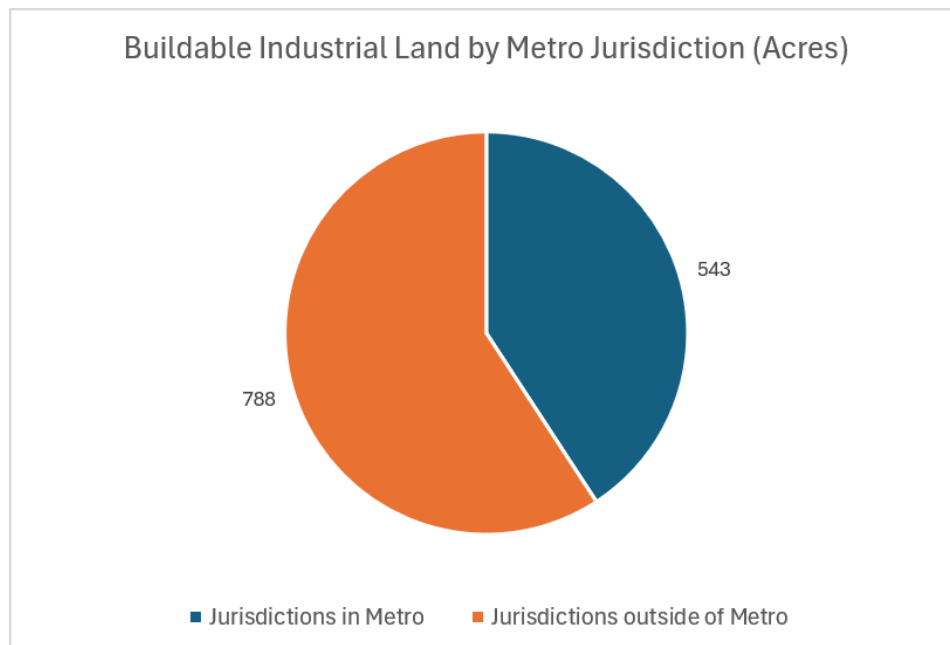


Figure 15. Buildable Industrial Land by Metro Status (Acres)

Figure 16 and Figure 17 below show the distribution of total *commercial* acres by jurisdiction for vacant, partially vacant, and redevelopable land.

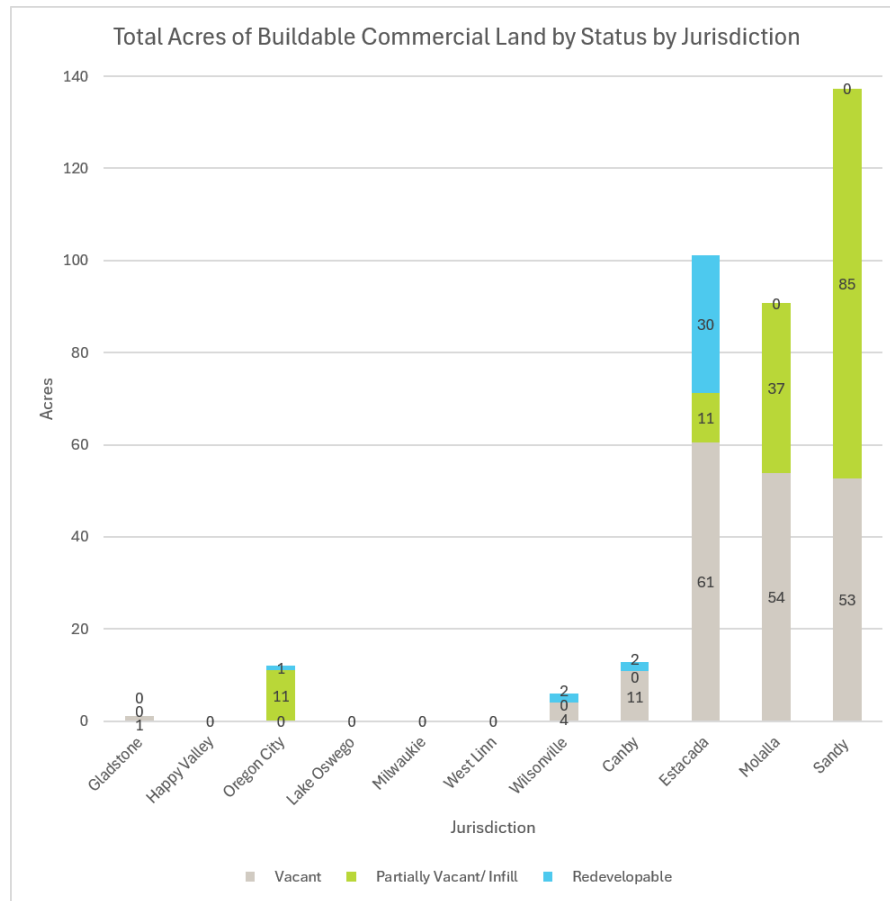


Figure 16. Total Acres of Buildable Commercial Land by Status by Jurisdiction

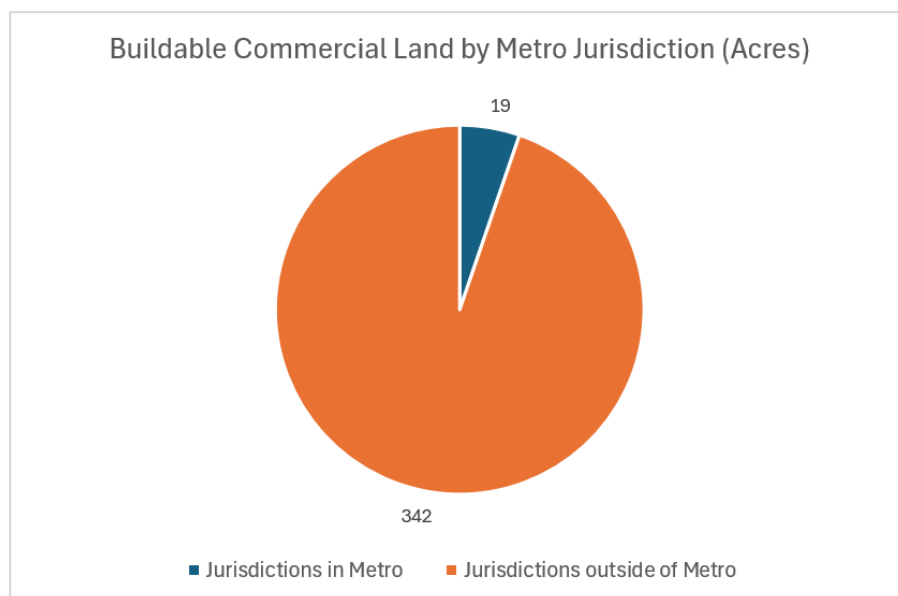


Figure 17. Buildable Commercial Land by Metro Status (Acres)

Land Availability Studies

Building a Clearer Picture of Employment Land

Clackamas County is conducting multiple studies to understand what industrial and employment land is currently available and ready for development, as well as what may be needed to meet future needs. The County is building on previous work — including the Economic Landscape Analysis and Site Characteristics Study — to develop a more complete understanding of the county's land supply. Together, these studies provide factual data to inform policy conversations that help the County work toward its implementation goal:

“By 2028, in conjunction with our communities and partners, the County will work to increase available land to retain, expand, and recruit new businesses.”

01

Economic Landscape Analysis

COMPLETED • AUGUST 2026

A snapshot of the county's economic health using historical data, examining five industry clusters that provide family-wage jobs: advanced manufacturing, food systems, high tech, health systems, and logistics.

02

Industrial Site Readiness Study

COMPLETED • APRIL 2026

Examines industrially zoned properties 5+ acres in unincorporated Clackamas County to identify development-ready sites versus significantly constrained ones. Now being updated to add mixed-use and commercial lands.

03

Site Characteristics Study

COMPLETED • BUSINESS OREGON

Statewide site readiness study focused on land, site, and infrastructure requirements for key industrial clusters. Produces an Industrial Development Competitiveness Matrix used to assess feasibility.

04

Economic Opportunities Analysis Consolidation

COMPLETED • SEPTEMBER 2026

Consolidated summary of Clackamas County cities' Economic Opportunities Analysis (EOA), clarifying the goals, opportunities, and needs of our cities.

05

Land Suitability Assessment

LATE 2027 / EARLY 2028

Studies rurally zoned land inside the urban growth boundary and land in the county's urban reserves to understand potential industrial development opportunities and constraints, and clarify land, site, and infrastructure requirements for key clusters.

Why this matters

Employment land is foundational to job creation and economic resilience — businesses need sites that are appropriately zoned, serviced, and ready to develop.

Together, these studies give Clackamas County a stronger factual foundation to understand employment land needs, identify opportunities and constraints, and plan for growth.