

AGENDA

**PLANNING COMMISSION and CITY COUNCIL
JOINT WORK SESSION**

August 21, 2025

5:30 p.m.

City Hall Council Chambers
313 Court Street, The Dalles, Oregon

Via Zoom

<https://us06web.zoom.us/j/82327794645?pwd=c1d2UGhUb1BoVithR0tFUzZzcWtXQT09>

Meeting ID: **823 2779 4645** Passcode: **001537**

Dial: 1-669-900-6833 or 1-253-215-8782

1. CALL TO ORDER
2. ROLL CALL
3. PLEDGE OF ALLEGIANCE
4. APPROVAL OF AGENDA
5. DISCUSSION ITEM
 - A. City of The Dalles Economic Opportunities Analysis
 1. Welcome
 2. Project Overview, Background, and Objectives
 3. Refined Employment and Land Demand Analysis
 4. Refined Buildable Land Inventory
 5. Refined Comprehensive Plan Goals, Policies, and Implementation Measures
 6. Wrap-up and Next Steps
6. ADJOURNMENT

Meeting conducted in a room in compliance with ADA standards.

Prepared by/
Crystal Sayre, Administrative Assistant
Community Development Department

CITY OF THE DALLES

"By working together, we will provide services that enhance the vitality of The Dalles."



CITY of THE DALLES

313 COURT STREET
THE DALLES, OREGON 97058

(541) 296-5481 ext. 1125
COMMUNITY DEVELOPMENT DEPARTMENT

MEMORANDUM

To: Honorable Mayor, City Council, and Planning Commission

Meeting Date: August 21, 2025

Re: City of The Dalles Economic Opportunities Analysis
Planning Commission/City Council Joint Work Session

Prepared by: Joshua Chandler, Community Development Director

DISCUSSION:

Beginning in Spring 2025, the City of The Dalles initiated an update to its Economic Opportunities Analysis (EOA) and Employment Buildable Lands Inventory (BLI) to guide long-term economic development and support updates to the City's Comprehensive Plan. Led by the consulting firm Moore Iacofano Goltsman, Inc. (MIG), this effort provides an in-depth analysis of employment and land needs, refines the inventory of buildable lands, and evaluates workforce and industry trends to position The Dalles for future growth. The EOA identifies land needed to accommodate projected industrial and other employment growth over a 20-year planning horizon, consistent with Statewide Planning Goal 9.

The City last completed an EOA in 2007, with updates in 2011. While the Oregon Department of Land Conservation and Development (DLCD) does not mandate a specific update frequency, it encourages local jurisdictions to periodically estimate future employment land demand to ensure comprehensive plans remain aligned with current economic trends and land use needs. A 2019–2021 EOA update raised concerns about the BLI, at which time the City Council did not adopt the analysis or proposed Comprehensive Plan updates. With prior data now outdated and significant changes in land supply over the past two to three years, the current update provides new data and analysis. This updated EOA will serve as the foundation for detailed economic development action planning, offering updated data, findings, and policy recommendations. It will guide future decision-making, grant applications, and planning efforts; serving as a basis for resource allocation; and informing review of development applications for consistency with Comprehensive Plan goals and policies.

As part of this process, City staff and MIG conducted three work sessions with a project-specific Advisory Committee composed of regional representatives. Advisory Committee members reviewed findings, provided feedback based on local conditions, and assisted in site-specific

refinements, collaborating to develop recommendations that align with the unique needs of The Dalles.

The findings from this work will support Comprehensive Plan updates to ensure the plan reflects anticipated opportunities and challenges. The purpose of tonight's meeting is to review and discuss the information presented to the Advisory Committee members over the past few months. This material represents work completed to date, with anticipated revisions following this discussion to guide strategies that reflect the economic opportunities and priorities of The Dalles.

The following meeting materials are included with this packet:

- **Attachment 1** – Memorandum: Summary of Additional Changes to Packet Materials, dated August 13, 2025
- **Attachment 2** – Economic Trends and Employment Land Needs
- **Attachment 3** – Refined Employment Buildable Lands Inventory, dated July 15, 2025
- **Attachment 4** – Revised Comprehensive Plan Goals, Policies, Actions, and Narrative, dated July 16, 2025



CITY OF THE DALLES | ECONOMIC OPPORTUNITIES ANALYSIS

JOINT PLANNING COMMISSION AND CITY COUNCIL WORK SESSION SUMMARY OF ADDITIONAL CHANGES TO PACKET MATERIALS

DATE August 13, 2025
 TO City of The Dalles Planning Commission and City Council
 FROM Matt Hastie and Jessa Miller, MIG
 CC Joshua Chandler, City of The Dalles

SUMMARY OF ADDITIONAL CHANGES TO PACKET MATERIALS

This document summarizes proposed changes to the materials included in the meeting packet for today's joint work session based on recommendations of the Public Advisory Committee (PAC) and City Staff. These changes have not yet been incorporated in those documents and will be made in the next round of revisions, along with any changes recommended by the Planning Commission and City Council during today's session.

REFINED EMPLOYMENT AND LAND DEMAND ANALYSIS

The PAC recommends the following revisions to the Refined Employment and Land Demand Analysis that will be incorporated in the next round of revisions.

- Add additional narrative explaining the aggregate need calculations and how they were adjusted throughout the process (e.g. to reflect updated information about target industry needs and current land use in The Dalles).
- Add additional narrative explaining the difference between aggregate land needs and site size configuration needs, and what this means for overall employment land needs in The Dalles. We will articulate the different methods for the two approaches for calculating land need and also highlight the limitations of the site needs analysis.
- Add an additional site needs summary table with an estimate for the acreage needed to accommodate demand for the different site need categories with caveats explaining the limitations of this analysis and the approach used to identify total acreage needs associated with the site needs analysis. This table will be presented at the work session and will demonstrate that although the City has sufficient acreage to accommodate the aggregate net land demand of 142 acres based on that typical approach to estimating land need, the City lacks sufficient land to accommodate the demand for the different site need categories.



The following average size is recommended to estimate the demand for the different site need categories:

- Small Sites: 0.75 acres
- Small/Medium sites: 4 acres
- Medium sites: 30 acres
- Large sites: 60 acres

REFINED BUILDABLE LAND INVENTORY

The PAC recommends the following revisions to the Refined Buildable Land Inventory that will be incorporated in the next round of revisions.

- Update the development status of 7 sites, including:
 - Identify one additional site as committed;
 - Identify five additional sites as developed; and
 - Identify one additional site as constrained.
- Update maps and tables to reflect the development status changes outlined above.
- Add additional narrative summarizing the range of sites available within each of the site size categories summarized in Step 4: Refined Results. Note that the ranges for some categories are quite large, given the potential variation in site needs across different industries.
- Add additional narrative explaining the difference between aggregate land needs and site size configuration needs, and what this means for overall employment land needs in The Dalles. Highlight the limitations of this analysis.

REFINED COMPREHENSIVE PLAN GOALS, POLICIES, AND IMPLEMENTATION MEASURES

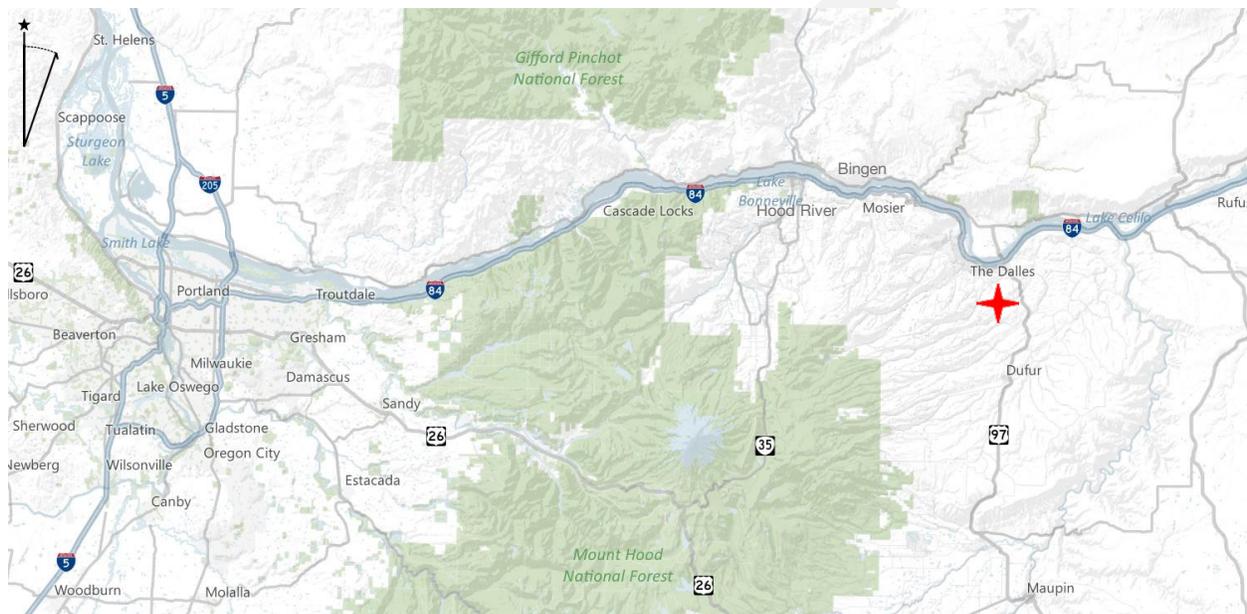
The PAC recommended the following revisions to the Refined Comprehensive Plan Goals, Policies, and Implementation Measures that will be incorporated in the next round of revisions.

- Update the narrative and narrative summary tables to reflect updates to the BLI.
- Add additional narrative explaining the difference between aggregate land needs and site size configuration needs, and what this means for overall employment land needs in The Dalles. Highlight the limitations of this analysis.
- Expand Policy 1-1 to reflect healthcare and target industry sectors.
- Expand Policy 2-2 to reflect additional amenities that are beneficial in helping to grow, attract, and retain a skilled workforce, including education, healthcare, recreation, and other quality of life services. Add two additional Implementation Measures relating to relocation of the hospital and urban renewal investment in riverfront properties.
- Add an additional Implementation Measure to Policy 2-2 focused on fostering partnerships to encourage community gardens to expand locally sourced food supplies.

ECONOMIC TRENDS AND EMPLOYMENT LAND NEEDS

OVERVIEW

The City of The Dalles is a regional center for the five-county Mid-Columbia Region centrally located along the Columbia River Gorge. With a population of approximately 16,100 people, it is the county seat and largest city of Wasco County, Oregon. It is well-positioned along Interstate 84 approximately 85 miles east of Portland, Oregon and Highway 197 that connects northerly to Dallesport, Washington across the Columbia River. It is surrounded by unique natural beauty of the Gorge, farmlands and Mt. Hood to the south.



As the end of the historic Overland Oregon Trail, The Dalles was the central location for commerce and activity within the Gorge. Today, the city continues to serve as the regional center for retail, government and institutions such as the Adventist Health Columbia Gorge, Columbia Gorge Community College, and Wasco County Courthouse. The Dalles region traditionally thrived on manufacturing industries tied to agriculture and metals such as the Harvey/Martin-Marietta aluminum smelter plant. Over time the regional economy has diversified with private investments such as Google data center, the success of the Port attracting new business and downtown investments. In 2024, employment levels in the region were nearing pre-pandemic levels as the economy continues to recover.

ECONOMIC DEVELOPMENT OVERVIEW

Economic development can be defined as efforts that seek to improve the economic well-being and quality of life for a community by supporting the creation and/or retention of middle and high-income jobs which grow incomes and the tax base through diversification of the local economy. These jobs are generally placed into two different categories defined as traded and local sector, and each have distinct needs in terms of workforce and business location. In addition, these sectors require different types of support and investments from various stakeholders. These sectors are distinguished for clarification regarding strategy objectives and actions.

TRADED SECTOR VS. LOCAL SECTOR JOBS

Traded sector (also referred to as an export or basic sector) businesses include industries and employers which produce goods and services that are consumed outside the region where they are produced and

therefore bring in new income to the area (e.g., metals and machinery, food processing, data centers). These sectors are sometimes referred to as productive sectors of the economy as their activities add value through the transformation of raw materials through the manufacturing process or pursuit of new innovations or processes that create greater efficiencies. Workers in the traded sector tend to have higher educational attainment, work more hours, and earn higher average wages than local sector business.

As the traded sector increases employment and wages, it also enables entrepreneurs to develop skills and resources to foster innovation and start new businesses and increase employment opportunities. Furthermore, certain traded sector companies foster a supply chain effect that creates the need for additional companies to supply components of a product that is manufactured or a service that is provided. Traded sector businesses in The Dalles include the Oregon Cherry Growers, PowderPure and Google.

Local sector businesses produce goods and services that are consumed locally in the region where they were made, and therefore circulate existing income in the area (e.g., breweries, physician offices, banks). These businesses are important as they make a community distinct and provide amenities to attract young professionals and families that drive the new economy. Local sector businesses in The Dalles include Freebridge Brewing, Columbia View Dental and regionally based Rivermark Credit Union.

Figure 1 highlights the average wage difference between traded sector jobs and local sector jobs across the United States. As the job base expands, a community is more attractive to employees because they have more options for career growth. In turn, once the employment base grows, competition will occur and ultimately increase wages.

Figure 1: Annual Average Wage Comparison Across Industries U.S. (2023)

NAICS	Industry Sector	Average Wage
Traded Sector		
51	Information	\$150,089
52-53	Financial Activities	\$118,623
42	Wholesale Trade	\$98,587
54-56	Professional & Business Services	\$97,154
31-33	Manufacturing	\$82,634
22,48-49	Transportation & Utilities	\$70,502
11,21	Natural Resources & Mining	\$70,285
Local Sector		
92	Government	\$80,352
23	Construction	\$76,878
62	Health Services	\$64,432
61	Education	\$62,052
91	Other Services	\$50,759
44-45	Retail Trade	\$41,127
71-72	Leisure & Hospitality	\$32,073

Source: Bureau of Labor Statistics, QCEW data

REVIEW OF ECONOMIC TRENDS

CURRENT ECONOMIC SITUATION & OUTLOOK, U.S. AND OREGON

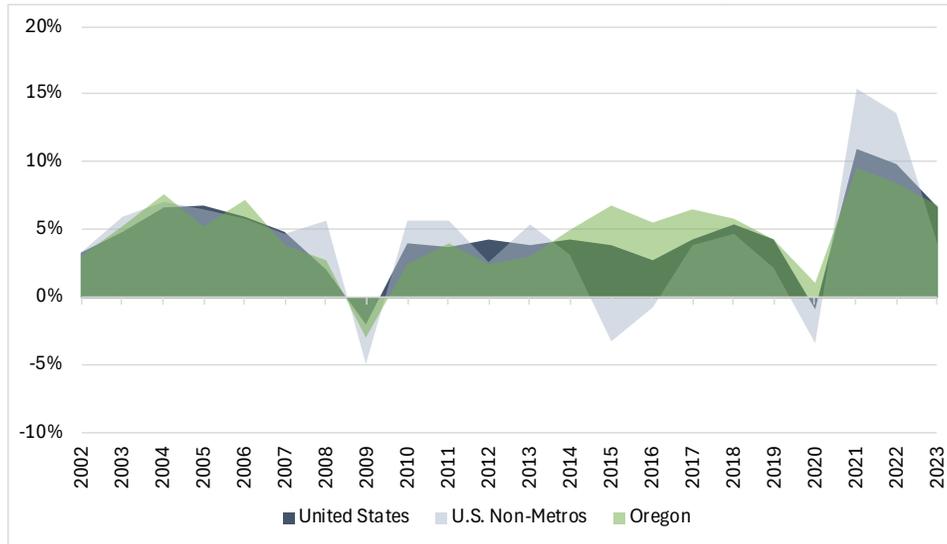
The current economic outlook for the U.S. and Oregon is mixed. Leading up to April 2025, the U.S. economy is generally solid with labor market conditions stable, inflation returning to the Federal Reserve’s long run goal of 2% and GDP averaging annual growth above 5% since 2021. Economic projections produced by the Federal Reserve indicate that GDP is expected to range between 0.6 and 2.5% through 2027, reflecting moderate uncertainty in the short term while longer term growth is expected to range between 1.5 and 2.5% annually.¹

Total employment has continued to rise since 2020 and unemployment has remained steady at just over 4% since April 2024. Federal Reserve projections anticipate that unemployment will likely remain at roughly 3.9 to 4.7% through 2027.

¹ Federal Reserve Board. (2025 March 19) *Summary of Economic Projections*: <https://www.federalreserve.gov/monetarypolicy/files/fomcproptab120250319.pdf>.

Similarly, Oregon’s economy has rebounded back from 2020 losses adding back over 300,000 jobs. Oregon’s GDP averaged 8.2% between 2021 and 2023. After a strong post-pandemic recovery, Oregon’s growth rates for major indicators appeared to be returning to long run averages in 2023.

Figure 2: GDP Growth for U.S., U.S. Non-Metros & Oregon (2001-2023)



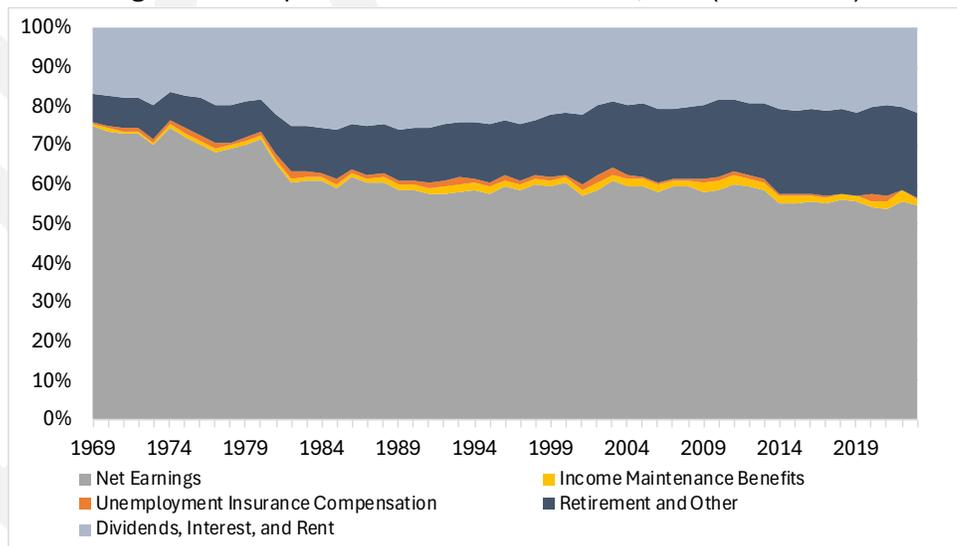
Source: U.S. Bureau of Economic Analysis

WAGES & PERSONAL INCOME

U.S. wages experienced strong gains starting in 2020 after holding steady at an average year over year increase of 3% during the 2010s. Industry wages increased by nearly 7% starting in 2020 but appear to be returning back to long-run averages as of 2023.

Figure 3 illustrates the trends in components of personal income in the U.S. between 1969 and 2023. Wages as a component of income have been steadily decreasing over time as other components such as retirement income and dividends, interest and rental income have gained magnitude. This trend is likely to continue for the next five to ten years as the number of retirees hits a peak in the U.S. around 2030.

Figure 3: Components of Personal Income, U.S. (1969-2023)



Source: Bureau of Economic Analysis

EMPLOYMENT GROWTH

Since 2020, national and state employment have grown by 2.1% and 1.7%, respectively. Employment in the MCEDD region has increased by 1.4%. Between 2015 and 2020, the region had been experiencing a

strong recovery from the 2008-09 recession adding 2,445 jobs resulting in a 2.0% annual growth rate.

Employment statistics within the Mid-Columbia Economic Development District (MCEDD) region are driven primarily by Hood River County and Wasco County, which together account for about 92% of total employment in the region. Relative to the region, Hood River County typically maintains above average growth rates, while Wasco County growth rates trend below average. Figure 4 shows average employment growth rates for five year periods since 2001. When not confronting the challenges of major economic disruptions such as the Great Recession or COVID pandemic, employment growth has been strong in most of the region's counties.

Figure 4: Comparison of Employment Growth Rates Since 2001

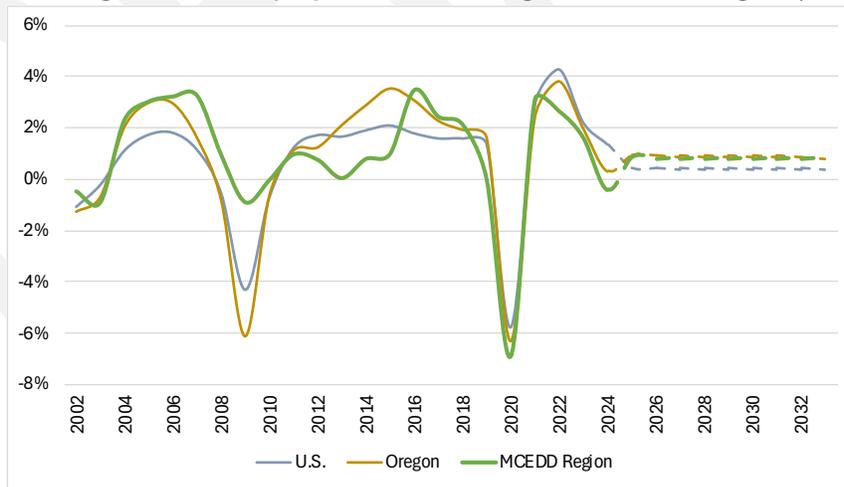
	2001-2005	2005-2010	2010-2015	2015-2019	2015-2020	2020-2024
U.S.	0.4%	-0.6%	1.7%	1.6%	0.1%	2.1%
Oregon	0.8%	-0.6%	2.2%	2.2%	0.5%	1.7%
REGION	1.0%	1.3%	0.7%	2.0%	0.2%	1.4%
Hood River Co.	2.7%	1.3%	0.8%	3.1%	0.6%	1.6%
Sherman Co.	0.8%	3.2%	1.5%	2.2%	1.9%	1.0%
Wasco Co.	-0.2%	1.0%	1.6%	0.5%	-0.7%	1.1%
Klickitat Co.	-0.6%	2.5%	-0.7%	3.1%	1.3%	1.1%
Skamania Co.	2.7%	-0.7%	0.0%	0.2%	-1.9%	2.8%

Source: U.S. Bureau of Economic Analysis, Oregon Employment Department and Washington Employment Security Department

During the next year or possibly two and thereafter, the consensus is that the U.S. as well as Oregon can expect continued but reduced job growth. The Oregon Employment Department (OED) forecasts job growth in Oregon to average about 0.9% annually or 170,000 total jobs through 2033.

The U.S. is expected to average 0.5% annual job growth through 2033.² According to forecasting from the Oregon Employment Department and Washington Employment Security Department, the MCEDD region is expected to grow at about 0.9% annually through 2033.

Figure 5: Change in Total Employment, U.S., Oregon & MCEDD Region (2001-2033)



*MCEDD Region Counties: Sherman, Wasco, Hood River, Klickitat and Skamania
 Source: Bureau of Labor Statistics, Oregon Employment Department, Washington Employment Security Department

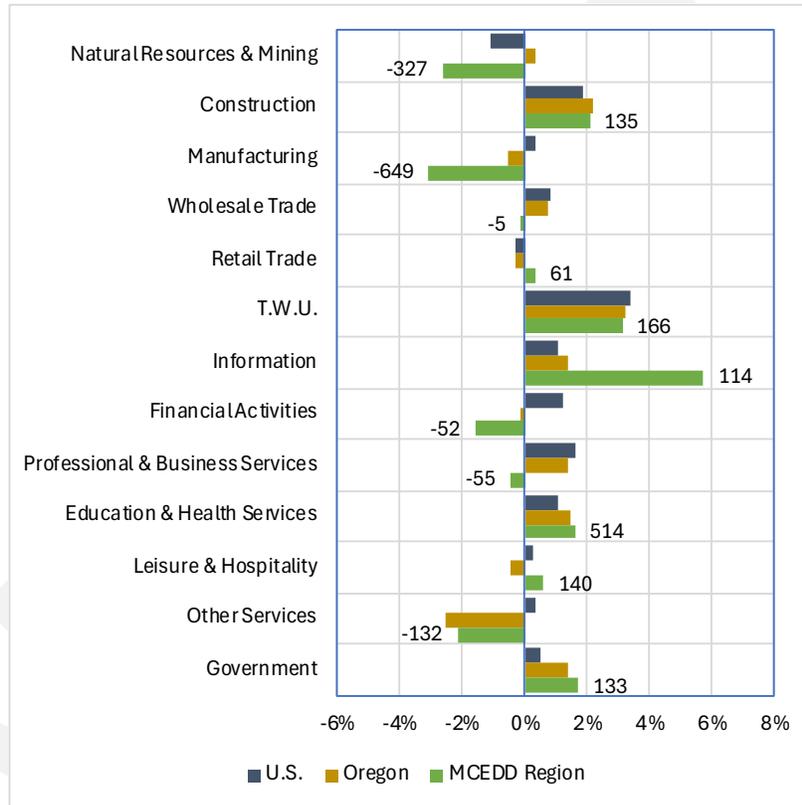
² U.S. Bureau of Labor Statistics. (2024 Aug 29) *Employment Projections: 2023-2033 Summary*: <https://www.bls.gov/news.release/ecopro.nr0.htm>

INDUSTRY SECTOR EMPLOYMENT GROWTH

Between 2019 and 2023, industry sectors in the U.S. experienced a number of major disruptions to economic activity with the COVID pandemic being the most significant. Since 2020, industry growth has been mixed with varying rates of recovery by industry. The region’s recovery is generally following national trends with strong growth in Construction, Transportation, Warehousing & Utilities (T.W.U.) and Information. On the other hand, Natural Resources, Manufacturing, Wholesale Trade and Other Services have experienced significant job declines.

T.W.U. has outpaced all other industries in growth in U.S. and Oregon, not surprising given the changes to economic activity brought on by the pandemic.

Figure 6: Industry Sector Growth, U.S., Oregon & MCEDD Region (2018-2023)



Source: U.S. Bureau of Labor Statistics

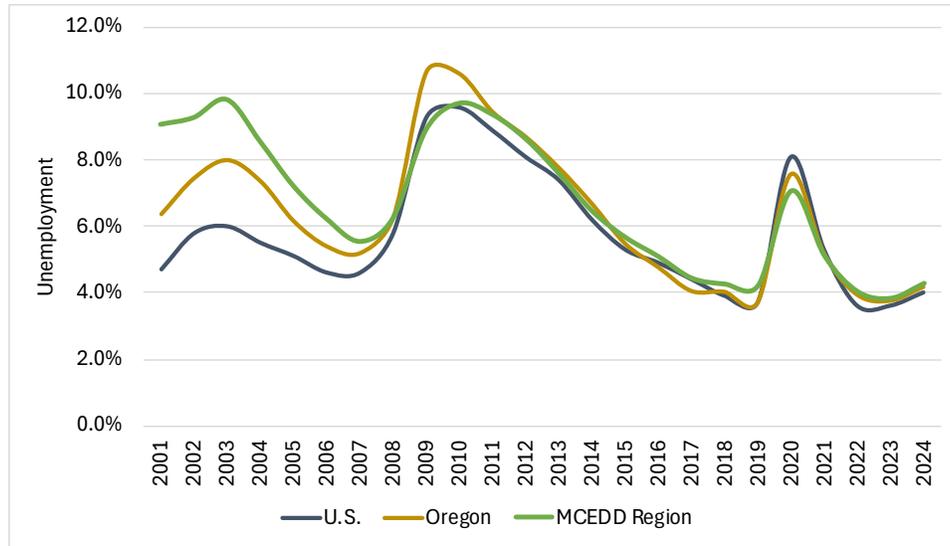
REGIONAL UNEMPLOYMENT

Figure 7 displays the U.S., Oregon and MCEDD region jobless rates between 2000 and 2024. After reaching 8.1% in 2020, the national unemployment rate dropped to 4.0% in 2024. U.S. job gains have far surpassed the jobs lost during the pandemic.

According to the U.S. Bureau of Labor Statistics, total “underemployment” in the U.S. – those unemployed and looking for work, as well as discouraged workers, underutilized workforce given skills and experience, as well as part-time employment by virtue of no full-time position availability – peaked at roughly 23% in April of 2020 and remained above 10% until June of 2021. It declined to 6.6% in April 2023 and has been slowly climbing to 7.9% as of March 2025.

Oregon and MCEDD’s unemployment rate have been closely tracking with the national rate. In 2023, Oregon and the region’s rates had dropped to 3.8% but exceeded 4% as of February 2025.

Figure 7: Unemployment Rate, U.S., Oregon & MCEDD Region (2001-2024)



Source: Bureau of Labor Statistics

POPULATION GROWTH

Between 2015 and 2024, The Dalles added 1,588 residents averaging a 1.2% annual growth rate. After the 2020 Census, the Portland State University’s (PSU) Population Research Center (PRC) adjusted population estimates for The Dalles upwards by 8%. Between 2015 and 2023, The Dalles added 887 households and 868 housing units.³

The MCEDD region added 3,429 residents and averaged 0.4% annual growth. Hood River County and Wasco County populations were adjusted downward by about 2,000 residents after the 2020 Census.

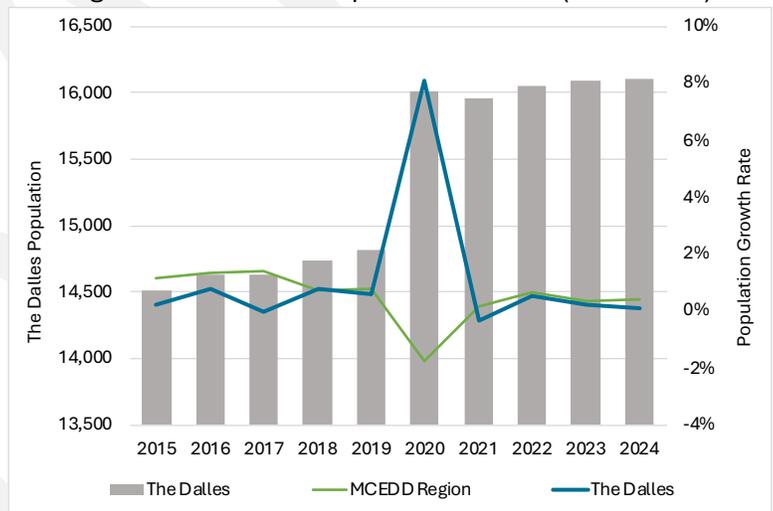
Oregon’s population rate over the same period was 0.7%.

MEDIAN AGE

The median age in The Dalles is 38.5, which is slightly younger than The Dalles was trending during the 2010s. Further, The Dalles is slightly younger than the overall MCEDD region, which averages a median age of 43.6. Similarly, the City of Hood River trends younger than the region with a median age of 37.9.

Places with relatively younger populations tend to have higher levels of labor force participation and better employment opportunities, as is the case for the cities of Hood River and The Dalles relative to the region. Labor force participation in The Dalles has been increasing over time to 61.6%. Regional labor force participation is 59.5%.

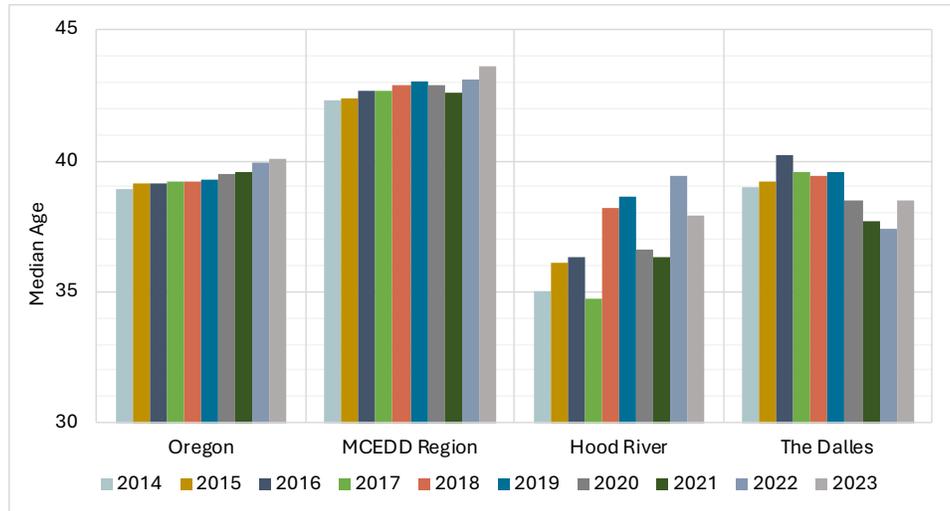
Figure 8: The Dalles Population Growth (2015-2024)



MCEDD Region Counties: Sherman, Wasco, Hood River, Klickitat and Skamania
Source: PSU Population Research Center (PRC)

³ Household and housing data is from the U.S. Census Bureau American Community Survey (ACS) 5-Year Estimates for 2015 through 2023.

Figure 9: Median Age, Oregon, MCEDD, Hood River & The Dalles (2014-2023)



MCEDD Region Counties: Sherman, Wasco, Hood River, Klickitat and Skamania
 U.S. Census Bureau, American Community Survey (ACS) 5-Year Estimates

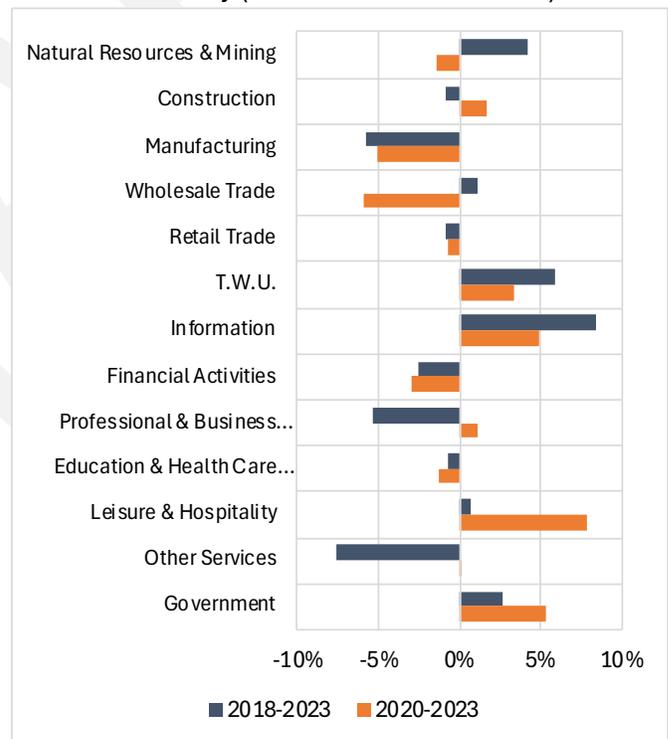
EMPLOYMENT & WAGE GROWTH

Between 2004 and 2019, employment growth in The Dalles slightly outpaced population growth at an average of 1.5% annually. Since dropping by 6.3% in 2020, employment in The Dalles has recovered at an annual average rate of 1.2%. The Dalles' share of Wasco County employment stands at 77% which is a slight increase from about 73% in 2006.

T.W.U., Information and Government experienced relatively strong growth during and after the pandemic. Most other industries, however, have experienced negative or mixed growth. While the region has likely recovered employment growth since 2020, as of 2023, The Dalles was 260 jobs (or 3.0%) short of its 2019 employment.

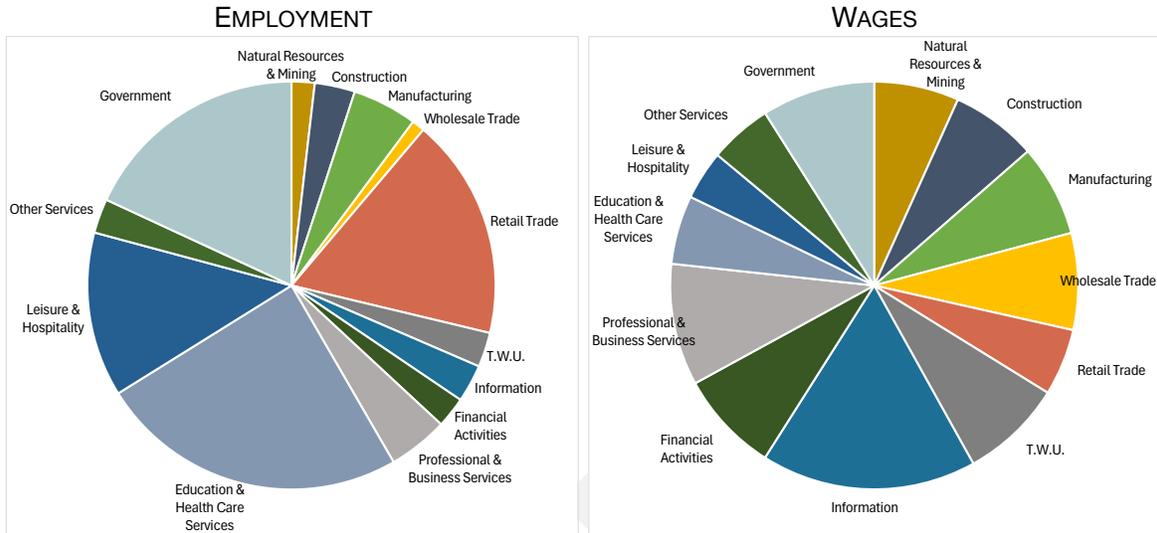
Figure 11 breaks down employment and wages in The Dalles by industry share. While Education & Health Care, Government and Retail Trade employ large shares of workers in The Dalles, wages by industry are more distributed with industries such as Natural Resources, Construction, Manufacturing, Wholesale Trade, T.W.U., Information, Financial Activities and Professional & Business Services contributing significantly to wages in The Dalles relative to their employment levels.

Figure 10: The Dalles Employment Growth by Industry (2018-2023 & 2020-2023)



Source: Oregon Employment Department QCEW

Figure 11: The Dalles Share of Industry Employment and Industry Wages (2023)

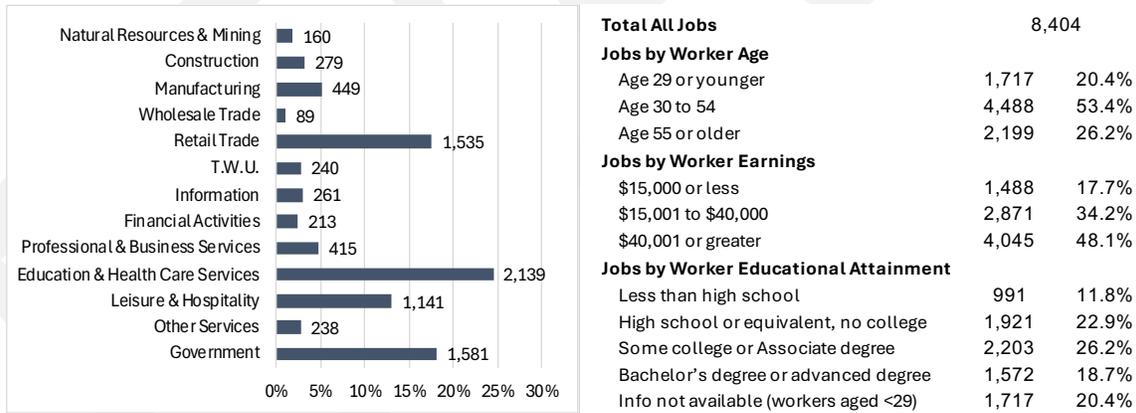


Source: Oregon Employment Department QCEW

Wage growth in The Dalles has increased by 4.1% annually during the last 10 years, following U.S. and statewide trends.

As of 2022, the city had 8,404 jobs, with Education and Health Care accounting for nearly a quarter of all jobs, followed by Government accounting for 18% of jobs and Retail Trade accounting for nearly 17.6%.⁴ Figure 12 shows the breakdown of workers in The Dalles by age, earnings and educational attainment.

Figure 12: The Dalles Employment Categories (2022)



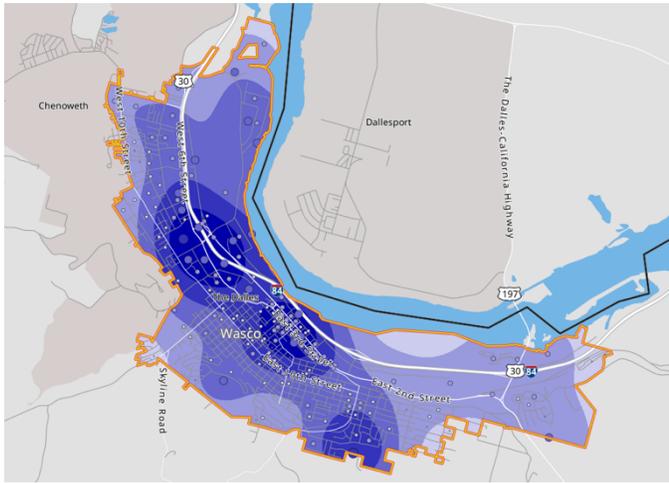
Source: U.S. Census Bureau On the Map and Oregon Employment Department QCEW

EMPLOYMENT DENSITIES & COMMUTE PATTERNS

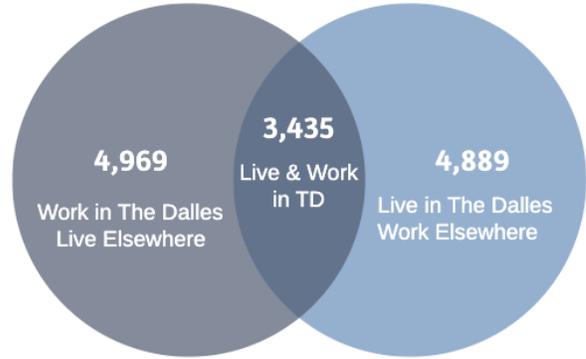
In 2022, of the 8,404 workers employed in The Dalles, the majority of jobs were concentrated in the areas along Interstate 84 in downtown and west of downtown as well as near the Adventist Health Columbia Gorge.

⁴ The most recent data available for the U.S. Census Bureau LEHD/On the Map program is 2022. For this reason, year 2022 data is also used for OED QCEW comparison.

Figure 13: The Dalles Employment Density & Worker Inflows/Outflows (2022)



Source: U.S. Census Bureau On the Map



Of the 4,969 workers who commute to The Dalles for jobs, the most prevalent areas in which workers live are Hood River/White Salmon area, Portland metro area, Goldendale and Eugene, Salem and Bend. Of the 4,889 residents who commute for work elsewhere, the majority of those residents are commuting to the Portland metro area, Hood River/White Salmon area, Salem, Bend/Redmond, Eugene and to cities to the east.

Figure 14: Where Workers Live (2022)

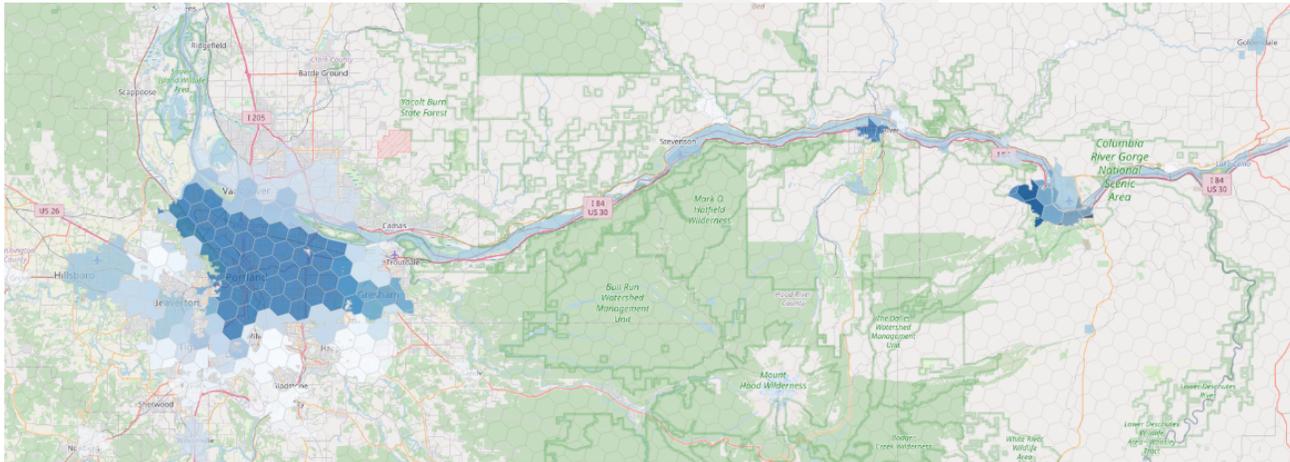
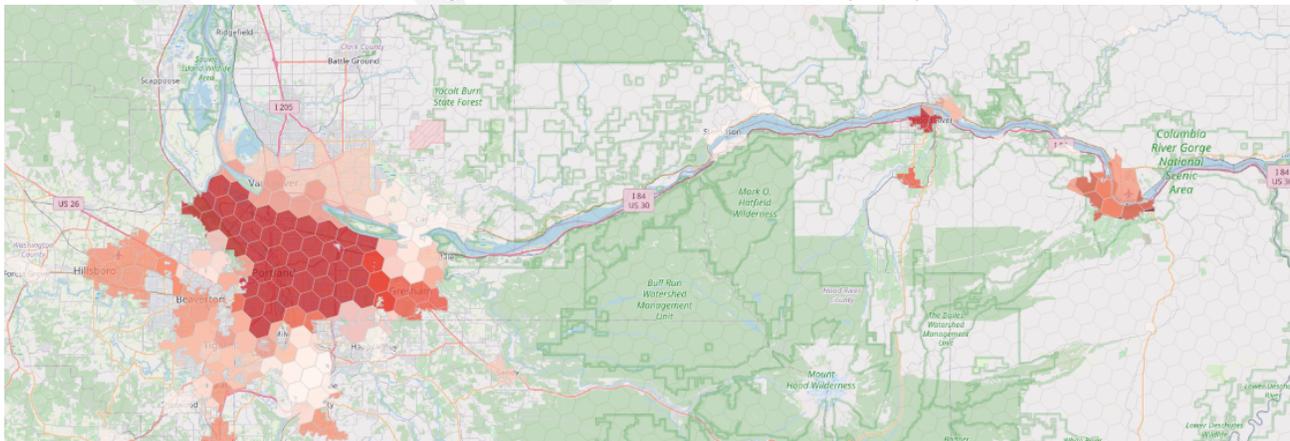


Figure 15: Where Residents Work (2022)



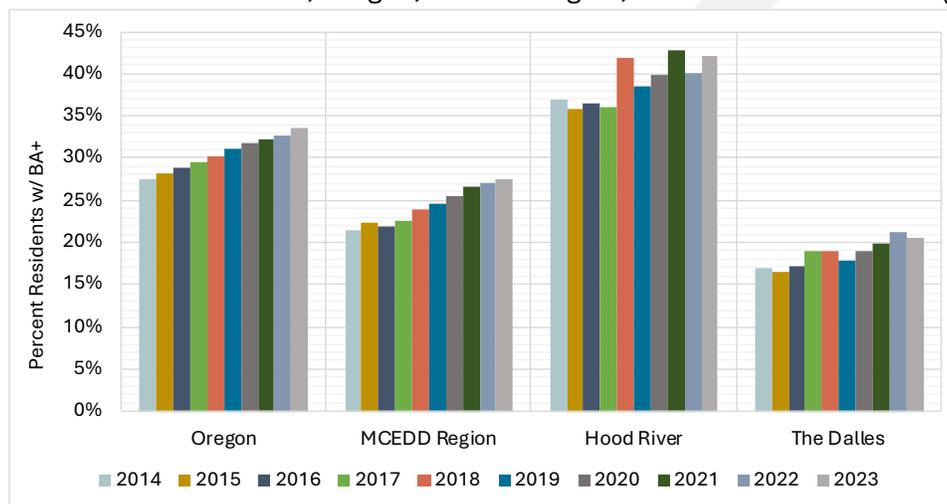
Source: U.S. Census Bureau On the Map

EDUCATIONAL ATTAINMENT

The Dalles exceeds statewide percentages (38% versus 34%, respectively) of residents with post-secondary or associate's degree education possibly indicating that the area may be more competitive for employers whose needs include the trades or other jobs requiring some college or certifications.

On the other hand, the percent of residents with a bachelor's degree or higher is significantly below statewide and regional levels but has been improving over the last ten years. The degree to which The Dalles is able to maintain or grow future economic activity will depend on the community's ability to attract and retain residents with bachelor's degrees and/or targeted post-secondary education levels.

Figure 16: Educational Attainment, Oregon, MCEDD Region, Hood River & The Dalles (2014-2023)



Source: U.S. Census Bureau, ACS 5-Year Estimates

OCCUPATIONAL SKILLS & OUTLOOK

Since 2018, The Dalles has had an influx of residents (new or newly experienced and/or trained) with skills in the following:

- Management, business and financial occupations, including all subcategories of management, business and financial operations.
- Healthcare practitioners and technical occupations, driven primarily by diagnosing and treating practitioners as well as technicians.
- Food preparation and service occupations.
- Natural resources, construction and maintenance occupations, driven primarily by agricultural and construction related occupations.
- Education, legal, community service, arts and media occupations, driven primarily by community and social service occupations.

According to occupational projections produced by the Oregon Employment Department, through 2033, The Dalles is expected to have about 550 new openings for various occupational skills. Total demand for occupations, including replacements, will be greatest in "Service" occupations, primarily in Food Preparation and Personal Care. Health Care and Management, Business, Financial and Professional related occupational skills will be in high demand as well.

ECONOMIC DEVELOPMENT POTENTIAL & REGIONAL INDUSTRY ASSESSMENT

REGIONAL INDUSTRY ASSESSMENT & POTENTIAL

The State of Oregon and MCEDD have identified industries for which there is a competitive advantage at a state and regional level based on employer strength, workforce and industry assets such as land and infrastructure. Identifying general alignment between the state, region and local industry strengths is important to maximize support for economic activity and talent development. Furthermore, Business Oregon focuses resources for infrastructure funding and business support on target and traded-sector industries. If the city intends to utilize such resources, it is important to identify and focus on these types of businesses. Figure 17 lists state, regional and local target industries.

The opportunity industries identified in Figure 17 are based on a review of existing economic activity in the region, conversations with local stakeholders familiar with business activity in The Dalles, programs at Columbia Gorge Community College (CGCC) and the need to expand growth in productive sectors of the economy. Infrastructure and workforce investments that will allow The Dalles to leverage regional and state efforts to bolster these industries are likely to have the greatest economic development impact. Firms and workers in these targeted industries can draw advantages from their proximity to growing competitors, skilled workforce, specialized suppliers, and a shared base of research driven knowledge within each growing segment.

One of the critical factors for successful business growth within target industries is a local talent pipeline. As the city and regional stakeholders focus efforts on industry development, CGCC is a critical partner in developing the essential talent needed. CGCC degree and/or certificate programs that are relevant to target industries are listed below as well.

Figure 17: Target Industry Comparison

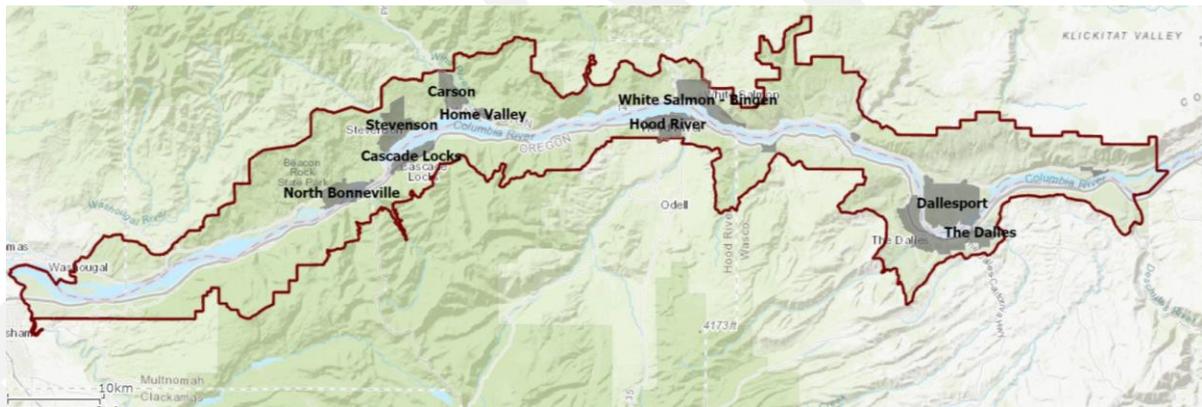
State of Oregon Key Industries	MCEDD Target Industries	The Dalles Target/Opportunity Industries	CGCC PROGRAMS
High Technology		High Technology (Data Centers, Data Analysis, Software)	Associate of Science - Computer Science (AS-CS)
Metals & Machinery/ Advanced Manufacturing	High Tech Unmanned Systems	Advanced Manufacturing (Unmanned Systems, Renewable Energy, Aerospace)	Advanced Manufacturing Aviation Maintenance Electro-Mechanical Technology Uncrewed Aircraft Systems
	Renewable Energy		
Bioscience	Health Care	Health Care	Associate of Applied Science: Nursing (OCNE)
		Life Sciences & Medicine, Manufacturing Fermentation	Advanced Manufacturing
Food & Beverages	Manufacturing: Value-Added Agriculture	Value-Added Agriculture, Manufacturing Fermentation	Advanced Manufacturing
		Agriculture	
Outdoor Gear & Apparel		Outdoor Recreation Equipment	Advanced Manufacturing

ASSESSMENT OF COMMUNITY ECONOMIC DEVELOPMENT POTENTIAL

The following key themes emerged as important topics among stakeholders or were identified through research as unique assets to the region that should be noted. In sum, The Dalles is well positioned to

support a growing, sustainable, and diversified economy within the Gorge. While productive sectors in The Dalles are still recovering from disruptions in 2020, they have a track record of recovery and dynamism that can be expected to return in the future if there exists an environment that supports growth. Continued local investments in the foundational components of thriving communities such as adequate and modern infrastructure, diverse and efficacious educational opportunities and space for development will ensure projected employment growth and opportunity for local residents.

- **Strong Infrastructure** – As evidenced by the Google data center investment, The Dalles is fortunate to have strong broadband and electrical power infrastructure that is provided through non-carbon emitting hydro-power. These assets are significant and should be promoted to encourage continued business investment.
- **Columbia Gorge Regional Airport Business Park** – The City of The Dalles, Oregon and Klickitat County, Washington jointly own Federal Aviation Administration (FAA) regulated 994-acre facility located in unincorporated Dallesport, Washington. The airport is surrounded by a 90-acre business park, which consists of shovel ready lots currently served with utilities and roads. Some of the parcels must be used for aviation related purposes but others can be used for general industrial purposes.
- **Columbia Gorge National Scenic Area (NSA)** – This is a unique federal designation that pertains to both states of Oregon and Washington. The intent of the NSA is to protect and provide for the enhancement of the scenic, cultural, recreational and natural resources of the Gorge; and to protect and support the economy of the Columbia River Gorge area by encouraging growth to occur in existing urban areas (shaded gray on the maps) and thereby allowing future economic development to occur.



Industry leaders conveyed that the Gorge and surrounding recreation is a huge asset for talent attraction. The scenic area serves to protect a significant asset but must be balanced with the need for growth. Stakeholders noted that the Gorge Commission views the NSA urban areas holistically (not by state boundaries) and agreed that this regional perspective is appropriate as the two areas complement each other through various services, housing and job opportunities that benefit workers and employers on both sides of the river.

- **Pendleton UAS Range (PUR)** - PUR is a partner test site within the University of Alaska Fairbanks (UAF) led Pan-Pacific UAS Test Range Complex, one of seven [FAA permitted UAS Test Sites](#) in the country. This facility is located approximately 125 east of The Dalles along Interstate 84. PUR is an important element in growing the UAS industry cluster. Continued collaboration, support and promotion of the facility on an ongoing basis is encouraged. The PUR director indicated that several out-of-state companies utilize the test range and may want a second location near the facility. A win-win collaboration between Pendleton and The Dalles will expand the offering of office/industrial sites available to out of state investors. Future outreach to the Warm Springs UAS Range, which has more limited service offerings, could be considered as well.

STRENGTHS, WEAKNESSES, OPPORTUNITIES, AND THREATS

Below is a non-exhaustive consideration of the strengths, weaknesses, opportunities, and threats to economic growth in The Dalles based on stakeholder input and general research.

Strengths and Opportunities

The Dalles is fortunate to be situated as a regional hub serving many of the smaller communities in the region. Its relatively larger economy offers a diversity of industries and talent that enable it to recover from economic shocks and begin to grow again.

The Dalles has excellent broadband availability and water and power capacity. The Columbia River Gorge is an exceptional asset by which to draw visitors and new residents who want access to varied outdoor recreational activities. Despite an acute lack of housing, The Dalles has added population and has increased its labor force participation during the last ten years.

The Columbia Gorge Regional Airport and the Business Park is a significant opportunity for growth in the aviation and manufacturing sector. The Columbia Gorge Community College has strong ties to the community and programs meant to support employer needs, changing industrial dynamics and the goals of its students.

Weaknesses and Threats

The most significant challenge for The Dalles is the lack of housing and land available for housing and employment growth. Given constraints due to the National Scenic Area and other land use restrictions, overcoming this challenge will require significant efforts by stakeholders to maximize infill development and work with regulators to expand development options. Further development options, and the tax revenues that accompany them, are critical for reducing the cost of housing as well as investing in and maintaining the infrastructure and talent development that provide the foundations for economic growth and a thriving community.

A further challenge in The Dalles is a lack of childcare providers. This issue is not unique to The Dalles and creative measures to reduce costs for childcare businesses in the short run is likely needed for the childcare sector to gain momentum wherein revenues can more closely cover costs.

While The Dalles has a strong downtown form, it also has significant investment opportunities. Efforts to incentive these investments will go far in presenting a community that continues to invest in itself and maintains optimism for the future.

THE DALLES EMPLOYMENT AND LAND DEMAND FORECAST

EMPLOYMENT PROJECTION SUMMARY

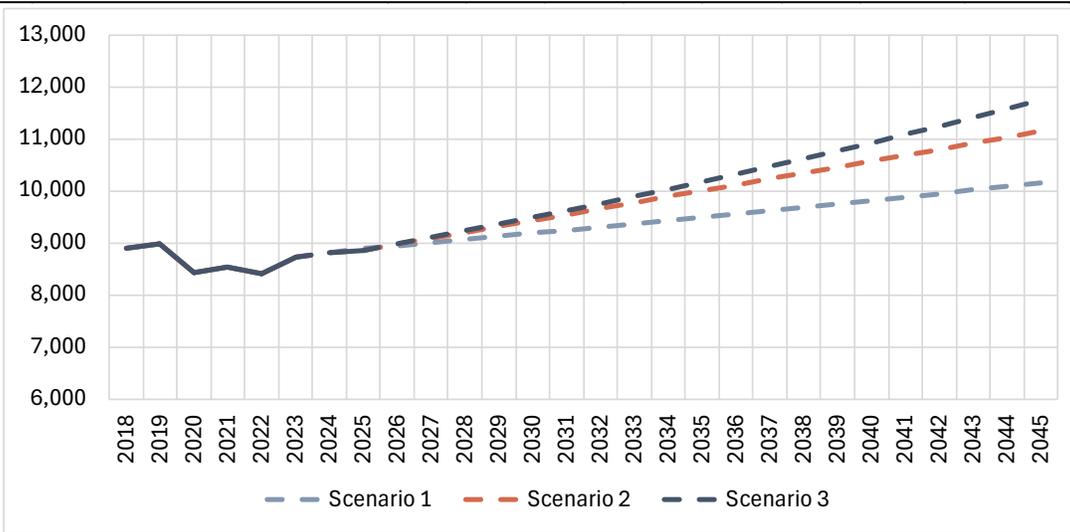
A range of three employment forecasts are estimated for The Dalles to understand alternative employment opportunity scenarios. Figure 18 summarizes total employment growth estimated under each of the three scenarios.

- The first scenario extends to twenty-years the ten-year regional forecast estimated by the Oregon Employment Department.
- The second scenario assumes The Dalles will maintain current population growth rates while also continuing to see an increase in labor participation rates.
- The third scenario assumes sustained growth in target industries and productive sectors which will increase overall dynamism in economic activity in The Dalles during the forecast period.

The scenarios and their methodologies are explained in greater detail in the sections below.

Figure 18: Employment Projections under 3 Methodologies for The Dalles (2025-2045)

Total Growth All Industries		2020	2025	2030	2035	2040	2045	Δ	CAGR
								2025-2045	2025-2045
1	TD Share of OED Extended Forecast	8,433	8,897	9,190	9,498	9,821	10,160	1,263	0.7%
2	Trend/Employment-Population Ratio	8,433	8,897	9,507	10,025	10,571	11,147	2,250	1.1%
3	Target Industries Growth Projection	8,433	8,897	9,490	10,174	10,926	11,757	2,860	1.4%



Source: Oregon Employment Department QCEW

20-YEAR EMPLOYMENT PROJECTIONS & METHODOLOGY

SCENARIO 1 is based on OED’s 2023-2033 regional employment forecast for Gilliam, Hood River, Sherman, Wasco and Wheeler Counties. As Hood River County and Wasco County together account for approximately 90.4% of total employment in the region, Scenario 1 assumes Hood River and Wasco Counties’ share of regional employment will remain fixed through the forecast period. Based on Hood River/Wasco Counties share of regional employment, Scenario 1 estimates annual growth rates by industry through 2033. Annual growth rates by industry are then extended through 2045 and adjusted for The Dalles estimated employment growth by industry between 2025 and 2045.

Under Scenario 1, The Dalles is expected to grow by 0.7% annually through 2045 and add 1,263 employees. The OED has downgraded the employment outlook for the Columbia Gorge during the last five years. Given significant uncertainty apparent in the U.S. economy, it is possible that OED is hedging employment forecasts in the event that the U.S. undergoes another major economic disruption. However, the essentially backward-looking forecast largely assumes that growth or disruptions in the past represent growth in the future. This may be the case but it is not a foregone conclusion. If The Dalles can address housing demand, maintain investments in infrastructure and talent and ensure space for future growth, it will position itself to exceed OED projections.

Another drawback to estimates under Scenario 1 is that projected growth in The Dalles is limited to regional industry growth projections which may not accurately represent local industry potential in The Dalles. While Hood River and Wasco Counties account for the majority of employment in the region, it is difficult to parse out how the other three counties may be impacting OED’s estimates of future growth potential in the region and therefore what expected growth rates are more representative for Hood River County, Wasco County and The Dalles.

Figure 19 provides more detail about the OED regional forecast and how it is applied to employment growth under Scenario 1.

Figure 19: Scenario 1. Oregon Employment Department (OED) Regional Forecast (2023-2033)

Employment	2023			Emp. Share Hood River/ Wasco	2033		Growth Rate**
	OED Region*	Hood River	Wasco		OED Region*	Hood River/ Wasco	
Total Private	23,910	12,600	9,364	91.9%	25,620	23,535	0.7%
Natural Resources & Mining	3,770	2,147	1,328	92.2%	3,860	3,558	0.2%
Construction	1,080	537	419	88.5%	1,210	1,071	1.1%
Manufacturing	2,360	1,812	493	97.7%	2,440	2,383	0.3%
Trade, Transportation & Utilities	4,510	1,988	2,072	90.0%	4,670	4,204	0.3%
Wholesale Trade	610	396	185	95.2%	650	619	0.6%
Retail Trade	3,170	1,460	1,599	96.5%	3,220	3,107	0.2%
Transportation, Warehousing & Utilities	730	132	288	57.5%	800	460	0.9%
Information	420	135	270	96.4%	460	444	0.9%
Financial Activities	710	225	237	65.1%	720	469	0.1%
Professional & Business Services	1,860	1,034	584	87.0%	2,080	1,809	1.1%
Educational & Health Services	4,340	1,967	2,234	96.8%	4,860	4,704	1.1%
Leisure & Hospitality	4,070	2,410	1,356	92.5%	4,500	4,164	1.0%
Other Services	790	337	368	89.2%	820	732	0.4%
Government	4,160	1,378	2,042	82.2%	4,210	3,461	0.1%
Federal Government	550	122	279	72.9%	540	394	-0.2%
State Government	470	113	274	82.3%	500	412	0.6%
Local Government	3,140	1,143	1,489	83.8%	3,170	2,657	0.1%
Local Government Education	1,540	641	700	87.1%	1,470	1,280	-0.5%
Total	28,070	13,978	11,406	90.4%	29,830	26,996	0.6%

*OED Region includes Gilliam, Hood River, Sherman, Wasco, and Wheeler Counties

**Growth rate applied to TD employment projections in Scenario 1.

Source: OED Regional Employment Projections

SCENARIO 2 is based on the presumption that The Dalles will continue current population growth albeit at a slightly lower rate (0.8% versus 1.0% between 2010 through 2023). Based on the PSU PRC population forecast, The Dalles is expected to grow at a rate of 0.3% during the forecast period. However, Scenario 2 assumes that The Dalles can begin to address its housing shortage and will be more likely to grow at a higher but still modest rate of 0.8%.

It is additionally assumed that The Dalles will continue to experience an increase in its labor force participation rate during the next twenty years thereby lowering of its population to jobs ratio (meaning it will have more jobs relative to its population). In Scenario 2, total employment is estimated and then distributed by industry sector based on current industry sector shares and historical industry growth rates. Employment in The Dalles is expected to grow by 1.1% annually through 2045 and add 2,250 employees.

Figure 20 details projected employment growth by sector over the twenty-year forecast period.

Figure 20: Scenario 2. Trend/Employment-Population Ratio Forecast (2025-2045)

Industry Sector	2020	2025	2030	2035	2040	2045	CHG (2025-45)	AAGR (2025-45)
Natural Resources & Mining	167	167	221	233	245	259	92	2.2%
Construction	265	284	323	340	359	378	94	1.4%
Manufacturing	524	452	469	494	521	549	97	1.3%
Wholesale Trade	107	91	96	101	107	113	22	1.1%
Retail Trade	1,570	1,551	1,640	1,730	1,824	1,923	372	1.1%
T.W.U.	217	248	315	332	350	369	121	2.0%
Information	226	267	325	342	361	381	114	1.8%
Financial Activities	233	214	221	233	246	260	46	1.0%
Professional & Business Services	401	425	494	521	549	579	154	1.6%
Education & Health Care Services	2,227	2,193	2,399	2,530	2,668	2,813	621	1.3%
Leisure & Hospitality	908	1,167	1,234	1,302	1,373	1,447	280	1.1%
Other Services	237	241	250	264	278	293	52	1.0%
Government	1,351	1,597	1,520	1,603	1,690	1,782	185	0.5%
Total	8,433	8,897	9,507	10,025	10,571	11,147	2,250	1.1%
Population	16,014	16,226	16,856	17,510	18,190	18,896	2,670	0.8%
Population/Employment Ratio	1.9	1.8	1.8	1.7	1.7	1.7	-0.12	-0.4%
Labor Force Participation	52.7%	54.7%	55.5%	56.3%	57.2%	58.0%	3.4%	0.3%

Source: Oregon Employment Department QCEW

SCENARIO 3 assumes that efforts to promote target industries and other productive sectors will be successful. Figure 21 shows projected employment growth by industry sector. Specifically, the following is implicit in the estimates:

- **Natural Resources & Mining:** Will experience marginal growth in fruit processing. This sector has maintained strong growth during the last twenty years.
- **Construction:** As housing and other employment sectors experience growth, building construction and specialty trades will see a local resurgence.
- **Manufacturing:** As a target industry, this forecast assumes that The Dalles will experience growth in manufacturing sectors related to Fermentation and Food & Beverage Processing, Advanced Manufacturing, Metals & Machinery, Renewable Energy and Bioscience/Medical Devices.
- **Wholesale Trade:** As a result of growth in target industries, growth in this sector is expected.
- **Retail Trade:** Sector is starting to recover and marginal growth is expected.
- **T.W.U.:** As a regional hub and with the growth in small regional and local Warehousing & Distribution facilities, this forecast assumes growth in this sector.
- **Information:** Given current activity in this sector, growth is expected.
- **Financial Activities:** While recovery and growth in this sector will lag, marginal growth is expected.
- **Professional & Business Services:** Continued growth in this sector is expected, particularly as some technology and aviation related activity is captured here.
- **Education & Health Care Services:** Marginal growth is expected.
- **Leisure & Hospitality:** Sector is starting to recover and growth is expected.
- **Other Services:** As other sectors begin to grow, this sector will recover.
- **Government:** Assumes slower growth over forecast period.

Figure 21: Scenario 3. Target Industry Growth Projection Forecast (2025-2045)

Industry Sector	2020	2025	2030	2035	2040	2045	CHG (2025-45)	AAGR (2025-45)
Natural Resources & Mining	167	167	186	207	230	256	89	2.2%
Construction	265	284	305	327	351	377	94	1.4%
Manufacturing	524	452	521	644	795	982	530	4.3%
Wholesale Trade	107	91	96	102	108	114	23	1.1%
Retail Trade	1,570	1,551	1,629	1,711	1,797	1,887	335	1.0%
T.W.U.	217	248	278	310	347	388	140	2.3%
Information	226	267	283	299	317	336	69	1.1%
Financial Activities	233	214	222	231	240	249	35	0.8%
Professional & Business Services	401	425	469	517	571	630	205	2.0%
Education & Health Care Services	2,227	2,193	2,332	2,481	2,639	2,807	615	1.2%
Leisure & Hospitality	908	1,167	1,267	1,375	1,492	1,619	451	1.6%
Other Services	237	241	254	266	280	294	52	1.0%
Government	1,351	1,597	1,650	1,704	1,761	1,819	222	0.7%
Total	8,433	8,897	9,490	10,174	10,926	11,757	2,860	1.4%

Source: Oregon Employment Department QCEW

IDENTIFICATION OF REQUIRED SITE TYPES

The land demand forecast extends the employment forecast to estimate the demand for employment land. Figure 22 shows 20-year land demand under the three employment growth scenarios. Short-term five-year land demand follows in Figure 23.

1. Projected total square footage needed to accommodate future employment is projected by assuming standard square feet per employee by employment land type. Total square footage needed is converted into gross acres but note that it is possible and perhaps preferable for The Dalles to accommodate certain types of future employment growth as infill within its downtown and other built areas, thereby reducing the number of gross acres demanded.
2. Total square feet per employee is converted into gross acres by assuming standard floor area ratios by employment land type. Other assumptions used in the conversion include:
 - a. A certain proportion of new employment will be expansions/hiring by existing companies that will not require site expansion. We have assumed 10% for industrial users, 15% for commercial/office users and 35% for commercial/retail users.
 - b. A percentage “gross up” due to infrastructure, setbacks, etc. For industrial sites, we assume 15% and for commercial (office & retail) users, we assume 20%.

Figure 22: The Dalles Twenty-Year Land Demand Forecast (2025-2045)

Scenario 1	Employment Land	New Employment	Sq.Ft./Employee	Total SF Needed	Floor Area Ratio*	Gross Acres Needed	Net Buildable Acres
	Industrial		174	600	104,328	0.15	16.9
Office		1,006	350	352,077	0.30	28.6	22.9
Retail		44	450	19,976	0.20	1.9	1.5
Government		39	550	21,241	0.25	2.1	1.7
Total		1,263		497,623		49.5	40.4

Scenario 2	Employment Land	New Employment	Sq.Ft./Employee	Total SF Needed	Floor Area Ratio*	Gross Acres Needed	Net Buildable Acres
	Industrial		456	600	273,876	0.15	44.4
Office		1,304	350	456,376	0.30	37.1	29.7
Retail		335	450	150,651	0.20	14.1	11.2
Government		185	550	101,713	0.25	9.9	7.9
Total		2,280		982,615		105.5	86.6

Scenario 3	Employment Land	New Employment	Sq.Ft./Employee	Total SF Needed	Floor Area Ratio*	Gross Acres Needed	Net Buildable Acres
	Industrial		1,149	600	689,449	0.15	111.7
Office		1,187	350	415,495	0.30	33.8	27.0
Retail		302	450	135,781	0.20	12.7	10.1
Government		222	550	122,135	0.25	11.9	9.5
Total		2,860		1,362,861		170.1	141.7

Source: OED QCEW

*Floor Area Ratio (FAR) is the ratio of total usable building area relative to the total area of the site. It allows a consideration of the entire floor area of a building as opposed to its footprint.

Figure 23: The Dalles Five-Year Land Demand Forecast (2025-2030)

Scenario 1	Employment Land	New Employment	Sq.Ft./Employee	Total SF Needed	Floor Area Ratio*	Gross Acres Needed	Net Buildable Acres
	Industrial		41	600	24,444	0.15	4.0
Office		232	350	81,148	0.30	6.6	5.3
Retail		11	450	4,936	0.20	0.5	0.4
Government		10	550	5,263	0.25	0.5	0.4
Total		293		115,790		11.5	9.4

Scenario 2	Employment Land	New Employment	Sq.Ft./Employee	Total SF Needed	Floor Area Ratio*	Gross Acres Needed	Net Buildable Acres
	Industrial		211	600	126,576	0.15	20.5
Office		426	350	149,138	0.30	12.1	9.7
Retail		80	450	36,032	0.20	3.4	2.7
Government		46	550	25,428	0.25	2.5	2.0
Total		763		337,175		38.5	31.8

Scenario 3	Employment Land	New Employment	Sq.Ft./Employee	Total SF Needed	Floor Area Ratio*	Gross Acres Needed	Net Buildable Acres
	Industrial		174	600	130,214	0.15	21.1
Office		327	350	81,755	0.30	6.6	5.3
Retail		70	450	24,497	0.20	2.3	1.8
Government		53	550	39,627	0.25	3.9	3.1
Total		623		276,094		33.9	28.2

Source: OED QCEW

*Floor Area Ratio (FAR) is the ratio of total usable building area relative to the total area of the site. It allows a consideration of the entire floor area of a building as opposed to its footprint.

Around 70% of employers in The Dalles are firms that employ under 10 people and account for about 18% of employment. These firms require all types of employment zones and typical land needs range from small sites in the Central Business Commercial district to two acres in more industrial zones. Businesses employing 10 to 20 employees account for 15% of firms and 16% of total employment. Land needs for these firms average two acres to around eight acres. Medium employers in The Dalles whose employment ranges between 20 to 99 employees account for 14% of firms and 47% of employment. For certain firms in this category, such as those that can situate in the Central Business Commercial district, employment can be accommodated on small sites but for most firms, site needs are more likely to range above eight acres. Firms employing more than 100 employees account for 1% of firms in The Dalles and 18% of employment. These firms typically require large sites above 60 acres. If feasible, medium and large firms are more likely to hold sites that are larger than currently needed or to hold additional sites to ensure the possibility for future local expansion.

For Scenarios 1 and 3, Figure 24 considers site needs to accommodate future employment growth based on average firm size in The Dalles. While Figure 24 estimates potential site need, it is important to remember that site demand varies extensively within industry sectors and many industries may need sites in different employment zones at different times or within the same time period. Due to this dynamic, to achieve results under the Target Industry/Scenario 3 forecast and particularly because it is difficult to forecast the needs of larger employers, The Dalles will need to have an adequate number of sites at all sizes.

Figure 24: The Dalles Potential Distribution of Site Type Demand* (2025-2045)

	General Commercial	Industrial	Retail	Government	Total
Employment Scenario 1	1,006	174	44	39	1,263
Small (1-9 employees)	216	39	8	2	265
Small/Medium (10-19 employees)	166	32	9	4	211
Medium (20-99 employees)	411	86	12	32	542
Large (100+ employees)	213	17	15	0	245
Employment Scenario 3	1,187	1,149	302	222	2,860
Small (1-9 employees)	255	258	52	14	579
Small/Medium (10-19 employees)	196	212	61	21	490
Medium (20-99 employees)	485	569	84	187	1,325
Large (100+ employees)	252	110	104	0	465
No. Sites by Avg Emp Scenario 1	82	15	2	1	100
Small (0 - 2 acres)	61	12	1	1	74
Small/Medium (2 - 8 acres)	10	2	0	0	13
Medium (8 - 60 acres)	9	2	0	1	12
Large (60 - 100 acres)	1	0	0	0	1
No. Sites by Avg Emp Scenario 3	97	102	12	8	218
Small (0 - 2 acres)	72	77	7	3	159
Small/Medium (2 - 8 acres)	12	14	3	1	30
Medium (8 - 60 acres)	11	10	2	3	26
Large (60 - 100 acres)	2	1	1	0	4

* Based on current average development patterns by zoning, site sizes and firm sizes.



CITY OF THE DALLES | ECONOMIC OPPORTUNITIES ANALYSIS

Refined Employment Buildable Lands Inventory – FINAL DRAFT

DATE July 15, 2025
 TO Joshua Chandler, City of The Dalles
 FROM Matt Hastie, Jessa Miller, and Andrew Parish, MIG
 CC Ayreann Colombo, Jacob Anderson, and Sandy Freund

INTRODUCTION

This memorandum describes the methodology and results of the refined Employment Buildable Lands Inventory (BLI). The BLI is part of an updated Economic Opportunities Analysis (EOA Update) for the City of The Dalles. It builds on preliminary work by Bridge Economic Development and MIG (previously Angelo Planning Group) for the City conducted in 2019-2020 (2020 EOA). The first phase of the current EOA Update, conducted by Competinomics, identifies employment conditions and trends, target industries, employment land needs, and draft strategies and actions to achieve the City's economic objectives.

The BLI represents the second phase or major task in the process. Once the BLI has been further refined as needed, the team will compare the land supply shown in the BLI to the land need identified by Competinomics to determine if there is enough land in the City's urban growth boundary (UGB) to meet the City's future employment land needs. In addition, the results will be used to update the City's recommended economic development strategies and actions.

This inventory covers land within the City's UGB, consistent with Oregon statutory and administrative rule requirements. It does not cover land within the community of Dallesport, Washington although that area is considered part of a larger regional employment area from an economic development perspective. As an example, the City of The Dalles co-owns the Columbia Gorge Regional Airport and markets land there for economic development purposes.

This document is accompanied by two attachments:

- Attachment A: EOA Update BLI Maps
- Attachment B: Employment Projections and Land Demand Analysis



REGULATORY BASIS

The BLI is conducted consistent with the requirements of statewide planning Goal 9 and the Goal 9 administrative rule (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 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.
2. **Industrial and commercial development policies (OAR 660-009-0020).** Cities with a population over 2,500 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 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 adopted 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.



REFINED BLI METHODOLOGY

The BLI for the EOA Update refines the employment buildable lands inventory conducted as part of the City's 2020 EOA (2020 BLI). Consistent with OAR 660-009-0015, the 2020 BLI was conducted in several steps, described below.

- **Step 1: Determine Land Type** – This step identifies all land within the UGB as either residential, employment, or other, based on zoning and other characteristics.
- **Step 2: Identify and Calculate Constraints** – This step identifies development constraints and removes them from the inventory to get an accurate measurement of the amount of developable land within the UGB.
- **Step 3: Classify Land by Development Status** – This step classifies land into categories of Vacant, Partially Vacant, Developed, and Committed, based on a series of filters using available data.
- **Step 4: Inventory Results** – This step reports the results of the analysis in various ways, and accounts for land needed for right-of-way and other public uses to arrive at total developable net acreage within the UGB.
- **Step 5: Comparison of Need and Supply** – This step compares the supply of buildable land identified in the inventory with the land needs projected in Phase 1 of the EOA and describes the need for parcels of different sizes zoned for industrial uses.

The remainder of this memorandum addresses the updates to each of the above steps in turn to reflect development that has occurred since the 2020 BLI. Main updates include incorporating updated tax lot assessor data (including new and revised tax lots within the UGB), changes to land development status due to recent development activity (Step 3), and updates to the overall inventory results due to tax lot and development status changes (Step 4 and Step 5).

STEP 1: DETERMINE LAND TYPE

Land in the City of The Dalles is categorized into Residential, Employment, and Other. This classification is made primarily by zoning designation as shown in Figure 1. A larger version of the figures included in this document can be found in Attachment A. Exceptions were made for cases based on existing land use, property ownership, or other circumstances. This categorization is broadly consistent with the 2016 residential BLI conducted by the City and APG, as well as the EOA work conducted in 2020 -2023. Targeted refinements related to specific properties included the following:

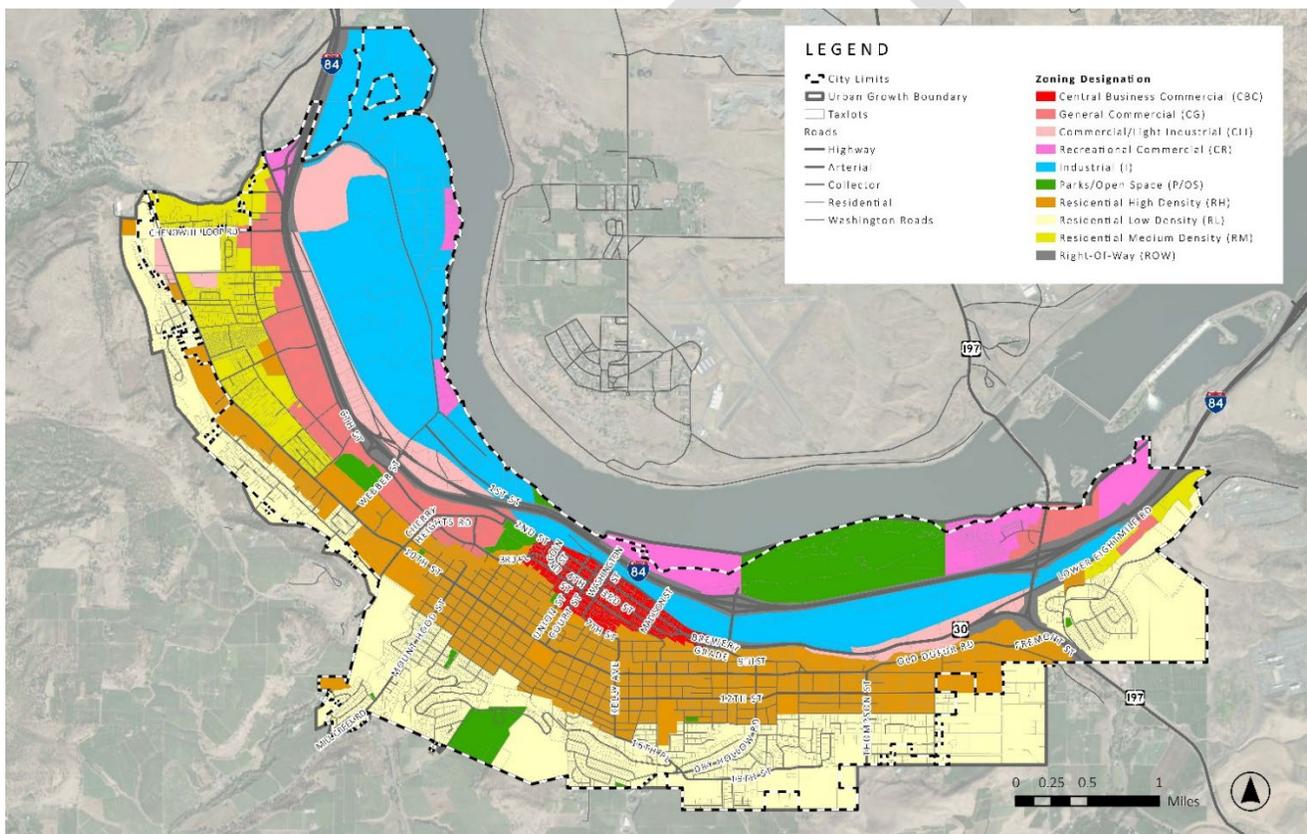
- Changes in zoning (i.e. change from residential to employment zones or vice versa).
- Limitations due to available access (i.e. slope constraints).
- Reductions to amount of unconstrained land to reflect portion of sites within UGB.



- Some properties owned by the Port of The Dalles are located just outside the floodplain, but near the riparian zone along the Columbia River, including one with a trail. These properties were removed from the inventory as constrained or committed to natural resources and/or recreational use.
- The Amerities Plant property, which is located outside of assessed tax lot records, was categorized as Employment.¹

Minimal updates were made to the 2020 BLI land type classifications conducted by the City and MIG to account for revised and/or new tax lots.

FIGURE 1: THE DALLES ZONING DESIGNATIONS (2025)



¹ Because the site is located outside of assessed tax lot record data, there are no tax assessor records that would typically be used to determine if the site is vacant, developed, or redevelopable. The site is largely developed based on visual inspection from aerial photos and confirmation from local stakeholder input, including property owner representatives.



FIGURE 2: THE DALLES LAND TYPES (2025)

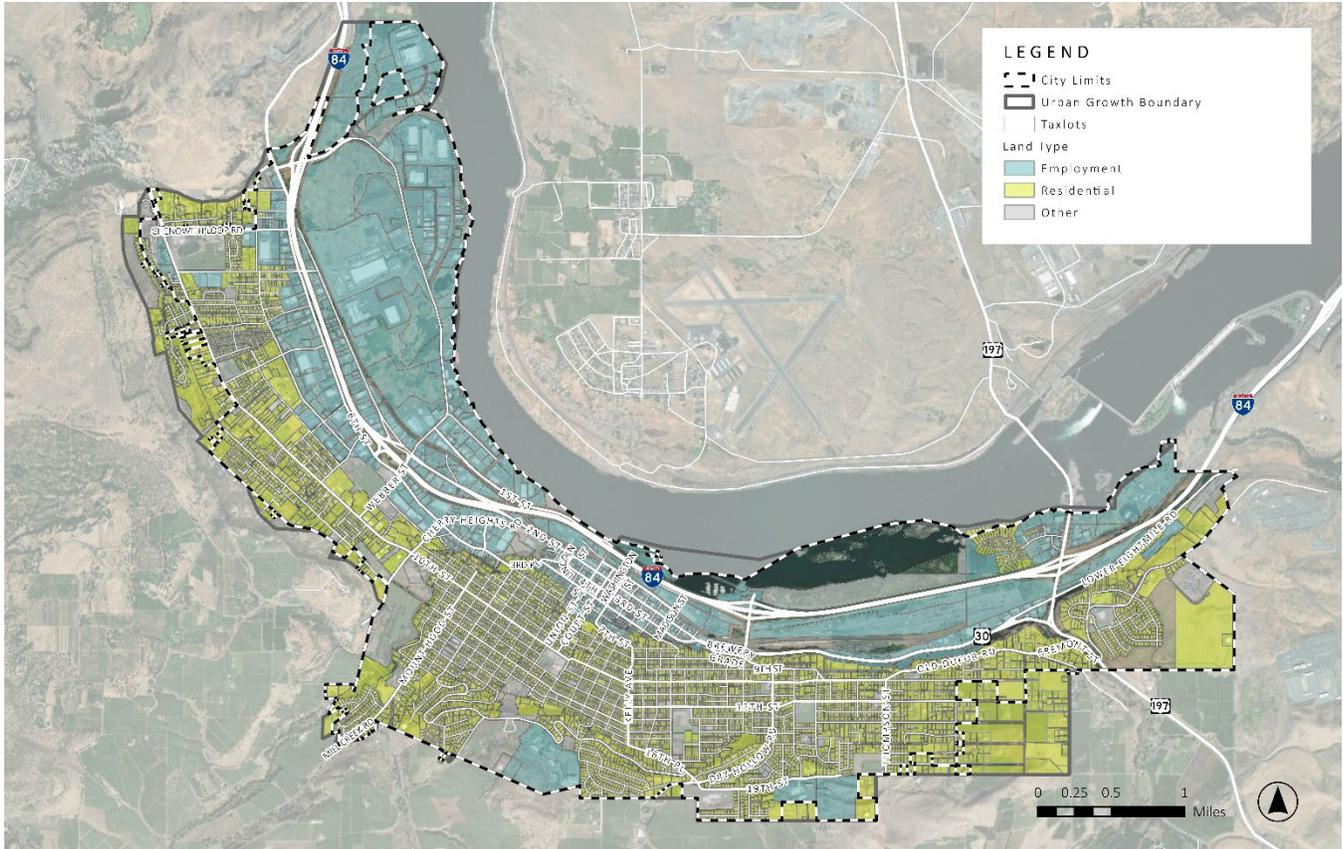


TABLE 1: THE DALLES LAND TYPE SUMMARY (2025)

Land Type ²	Number of Tax Lots (2025)	Gross Acres (2025)
Employment	896	1,683
Residential	5,824	1,743
Other	121	952
Total³	6,841	4,379

² Acres rounded down to whole number.

³ Gross acreage includes a limited number of tax lots that are partially located inside The Dalles UGB.



STEP 2: CALCULATE CONSTRAINTS

As defined in OAR 660-009-005, “Development Constraints” are factors that temporarily or permanently limit or prevent the use of land for economic development. Development constraints include, but are not limited to, wetlands, environmentally sensitive areas such as habitat, slope, topography, infrastructure deficiencies, parcel fragmentation, or natural hazard areas. The constraints used for this analysis include:

- Slopes greater than 25% (Source: Oregon Department of Geologic and Mineral Industries)
- FEMA Flood Hazard Area (Source: FEMA)⁴
- Wetlands (Source: US Fish and Wildlife Service National Wetlands Inventory)
- Area within 50’ of the City of The Dalles’ managed stream corridors, including Chenoweth Creek, Mill Creek, and Three-Mile Creek (Source: Oregon Geospatial Enterprise Office and City of The Dalles)
- The superfund site previously owned by Lockheed Martin and formerly used as an aluminum production site is considered environmentally constrained and was identified as “committed” within the BLI, consistent with state rules.
- Bonneville Power Administration (BPA) Right-of-Way Easements⁵

Land affected by these constraints is removed from the inventory. Figure 3 on the next page shows the location of these constraints.

Some land within the study area is subject to additional cost constraints such as cultural/archeological sites or areas within the City’s geohazard overlay. Cultural/archeological sites may be protected or prohibited from development or may require additional documentation or protection of resources found on the site.⁶ Regulations for sites within the geohazard overlay require studies by qualified geologic specialists to be prepared prior to developing the site and that structures be designed and built to withstand geologic conditions.

Although these cost constraints pose a limitation to site developability, they are still considered to be buildable over the planning horizon and have not been removed from the inventory. Cost constraints represent an added cost to development, making its developability less attractive or feasible relative to

⁴ We have used the most current floodplain data from FEMA. This data and the maps associated with it are identified as preliminary and are still under public review. However, according to FEMA staff, few if any changes to this data are anticipated as a result of the remaining review process.

⁵ The BPA administers an application process for development within its easements. Although certain types of development are allowed in these areas, BPA staff and applicants note that no structures are allowed within the easement areas and non-structural development (i.e. parking lots) is extremely limited and site-dependent. In addition, accommodating development on a site with an easement typically requires relocating easements and facilities at the owners expense. Such relocation processes are very costly and can take years to complete. As a result, all land within BPA easements is considered constrained from development for the purposes of the inventory.

⁶ Locations of cultural/archeological sites are not publicly available to protect the resource. A site is considered developable until this information is known, at which point appropriate mitigation measures would be identified and implemented.



other sites. However, it does not necessarily prohibit the site from developing within the planning horizon. Sites that encounter some form of cost constraint would require additional investment in the form of time or money to be developed.

To the extent that property owners can provide additional information that shows that development is prohibited on all or a portion of these sites within the planning horizon, that acreage can be deducted from the total inventory.

FIGURE 3: THE DALLES DEVELOPMENT CONSTRAINTS (2025)

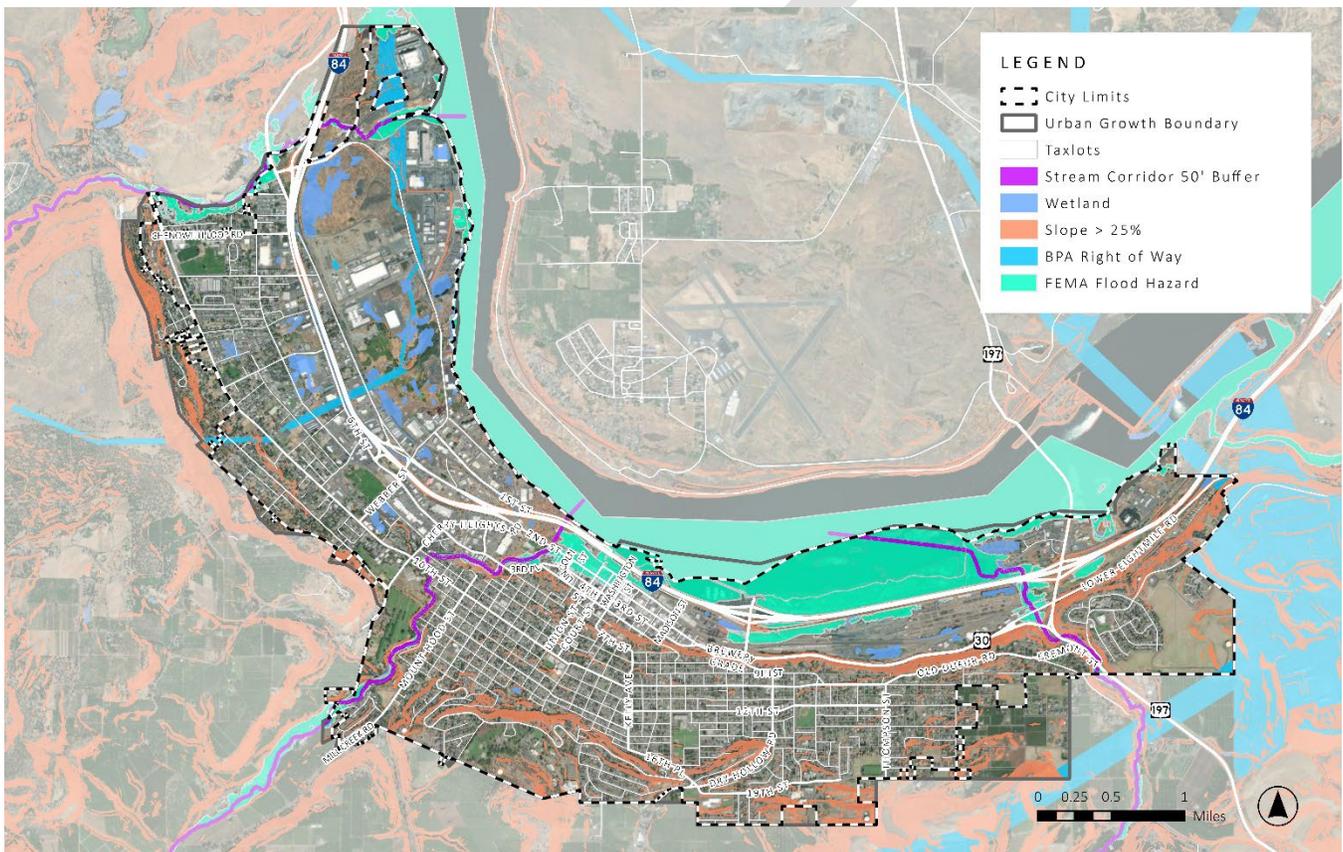




TABLE 2: THE DALLES DEVELOPMENT CONSTRAINTS SUMMARY (2025)

Category ⁷	Gross Acres Within Tax Lots	Gross Constrained Acres	Gross Buildable Acres
Employment	1,683	359	1,316
Total	1,683	359	1,316

STEP 3: CLASSIFY EMPLOYMENT LAND BY DEVELOPMENT STATUS

The 2020 BLI classified employment land within the study area by development status, as follows:

- **“Vacant”** land meets one or more of the following criteria:
 - equal to or larger than ½ acre and not currently containing permanent improvements⁸
 - equal to or larger than 5 acres where less than ½ acre is occupied by permanent buildings or improvements
 - improvement value is less than \$5,000 or less than 5% of the property’s land value.
- **“Partially Vacant”** land has an improvement value of between 5% and 40% of the land value, or is greater than one acre in size with at least ½ acre not improved (based on aerial photo). This land will assume that 50% is vacant/50% is developed unless aerial photos or other information shows otherwise.
- **“Developed”** land has an improvement value greater than 40% of the land value and does not meet the definition of vacant or partially vacant.
- **“Committed”** land is either vacant or partially vacant but has been removed from inventory as being developable because the property is committed to a non-employment use or cannot be developed for an employment use during the planning period. Committed land does not include properties planned for some type of employment use by the existing owner, but not necessarily available to other businesses for sale or lease. The following areas are not anticipated to develop over the planning horizon based on input from local stakeholders.
 - **Port of The Dalles Properties.** The Port of The Dalles owns several commercial and industrial properties within the study area. Many of these properties currently do not have improvements on them (\$0 improvements value according to tax

⁷ Acres rounded down to whole number.

⁸ Improvements include anything with an “improvement value” as defined by the Wasco County tax assessor, consistent with state administrative rule and statutory definitions. Examples typically include buildings or other permanent structures, associated equipment or machinery, and utility facilities located on the site. Improvements for taxation purposes are further defined in Oregon Administrative Rule (OAR) 150-037-0010.



assessor data). The Port identified several of these properties that would not be developable within the study horizon. These properties were categorized as committed.

- **Federal Properties.** Several properties are owned by the federal government.⁹ There are no known plans for these sites to develop or redevelop within the planning horizon. These properties are classified as committed and removed from available land inventory.
- **Lockheed Martin Properties and Superfund Site.** These properties are removed from the inventory based on OAR provisions that indicate that constraints can include environmental contamination and based on documentation received from the Port of The Dalles and Lockheed Martin. While these sites meet the definition of vacant sites, 100% of the properties are considered constrained due to prior contamination.

The 2020 BLI development status classifications were updated using recent development permit data and feedback from City staff to identify sites that have been partially or fully developed since 2020. A total of 25 sites that were previously identified as vacant have been developed since 2020 (two (2) of are identified as “Committed”), and three (3) sites previously identified as vacant have been partially developed since 2020 based on building permit data and feedback from City staff.

A total of 34 sites are identified as committed. Eighteen (18) new properties are now identified as committed, including two (2) sites owned by Columbia Gorge Community College, four (4) sites owned by the Mid-Columbia Medical Center, seven (7) sites impacted by substations or transmission lines, one (1) site owned by Google that was previously part of a larger Google-owned lot, one (1) site owned by the City of The Dalles that was previously part of the same larger Google-owned lot, two (2) sites planned for a public parking lot, and one (1) site recently developed as a municipal sanitary pump station.

In addition to the changes described above, the inventory was further refined through more detailed site review conducted by City staff and members of the Project Advisory Committee. This resulted in the following types of additional changes:

- Identified City-owned public parking lots as developed sites. Identified other parking lots as vacant, except if they are associated with a specific use in which case they were identified as developed.

⁹ Oregon Administrative Rules allow for federally owned properties to be removed from a BLI.



- Eliminated buildable acreage on sites where only small, very narrow, or otherwise unusable portions of the property are unconstrained by natural resources, making these sites 100% constrained.
- Revised the status of several sites from “vacant” to “partially vacant” or “developed” where evaluation of aerial photography or on-site field checks show that improvement values did not accurately portray the status of the sites.
- Identified several sites as committed where they have been developed or are planned for public or utility uses.
- Added an additional development status classification titled “Constrained” to demonstrate sites that have zero (0) unconstrained acreage resulting in no developable employment land.

TABLE 3: SUMMARY OF EMPLOYMENT LAND BUILDABLE ACREAGE BY DEVELOPMENT STATUS (2025)¹⁰

Employment Zone	Developed	Committed	Partially Vacant	Vacant	Total Buildable Acres
CBC	51.1	0.4	2.6	1.8	55.9
CG	173.3	0	4.1	19.9	197.3
CLI¹¹	86.2	2.0	4.8	47.1	140.1
CR	208.7	0	0.2	35.9	244.9
I (subtotal)	376.4	79.8	14.1	131.5	601.7
<i>Google Sites</i>	<i>125</i>	<i>10</i>	<i>0</i>	<i>53</i>	<i>188</i>
<i>Other Sites</i>	<i>251.4</i>	<i>69.8</i>	<i>14.1</i>	<i>50.3</i>	<i>428</i>
RL¹²	0	76.4	0	0	76
Total	895.8	158.6	25.6	236.3	1316.3

The gross acreage of buildable land summarized in Table 3 was reduced further to account for undeveloped sites owned by Google that are subject to non-disclosure agreements which comprise approximately 53 (gross) acres of unconstrained land. The amount of available land at undeveloped Google sites was estimated based on current approximate employment estimates for developed sites in The Dalles. The ratio of projected employment at the existing Google sites, compared to other industrial land in The Dalles, is approximately 0.85. In other words, employment estimates at undeveloped Google sites is anticipated to be approximately 85% of what would typically be assumed

¹⁰ Source: Wasco County Tax Assessment data; MIG; The Dalles Employment Buildable Lands Inventory (2025).

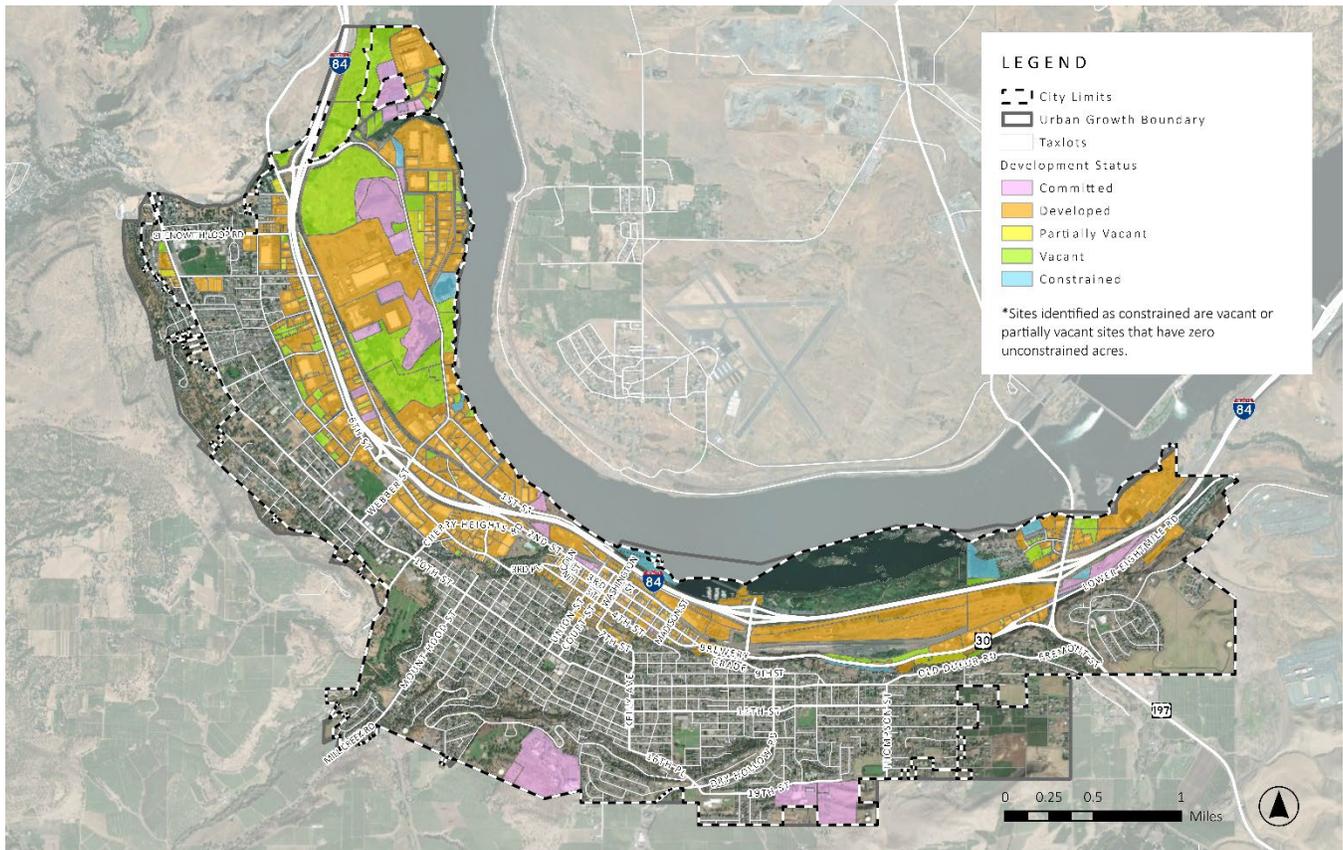
¹¹ The Walmart site is in the CLI zone and comprises approximately 38 vacant acres. The site previously received land use approval for a Walmart facility. However, the decision was appealed and has not yet been developed. The site is considered vacant and considered buildable for this analysis because no building permit has been issued and the land use approval itself does not guarantee the site’s development.

¹² RL properties include the hospital and Columbia Gorge Community College campuses.



for average employment density on other sites in the inventory. This ratio was developed based on employment estimate discussions with Google representatives and Enterprise Zone employment estimates during development of the 2020 EOA. Applying this ratio to undeveloped Google sites results in a reduction of approximately eight (8) gross acres of vacant Industrial zoned land in the inventory due to these estimated low employment densities. Figure 4 shows the classification of employment land within the UGB.

FIGURE 4: THE DALLES EMPLOYMENT LAND BY DEVELOPMENT STATUS (2025)



STEP 4: REFINED RESULTS

There is an estimated 254 gross acres of vacant or partially vacant employment land in The Dalles. The gross acreage accounts for the reduction in 8 acres of available land on sites owned by Google based on lower assumed employment densities on those sites. The following assumptions were used to determine the net acreage of land within the City. The assumptions are consistent with those used in Phase 1 of the EOA.

- 50% of all employment land identified as partially vacant will not be developable to account for existing development and infrastructure.



- 15% of industrial employment land (I zone) will be set aside to account for infrastructure, setbacks, etc.
- 20% of commercial employment land (CBC, CG, CLI, and CR zones) will be set aside to account for infrastructure, setbacks, etc.

There is an estimated 202 acres available for employment land after accounting for existing development on partially vacant land and set asides for infrastructure-related and other needs on vacant land. Table 4 below provides a summary for each zone.

TABLE 4: GROSS & NET DEVELOPABLE ACRES OF EMPLOYMENT LAND

Employment Zone	Partially Vacant Land		Vacant Land		Total Buildable Land
	Gross	Net	Gross	Net	
CBC	2.6	1.3	1.8	1.5	2.7
CG	4.1	2.0	19.9	15.9	17.9
CLI	4.8	2.4	47.1	37.7	40.1
CR	0.2	0.1	35.9	28.8	28.8
I (subtotal)	14.1	7.0	123.5	105.0	112.0
<i>Google Sites</i>	0.0	0.0	53.0	45.1	45.1
<i>Other Sites</i>	14.1	7.0	70.5	59.9	67.0
Total	25.6	12.8	228.3	188.8	201.6

The City's EOA includes an Employment Projection and Land Demand Analysis that incorporates three scenarios that estimate the projected employment and associated need for employment land. The scenarios incorporate different growth projections and employment assumptions. Figure 5 provides a summary of the land demand forecast for each scenario. Based on the scenarios, the total need for net buildable acres ranges between 40 to 142 acres. The City's preferred scenario is Scenario 3.



FIGURE 5: THE DALLES LAND DEMAND FORECAST, 2025-2045

Scenario 1	Employment Land	New Employment	Sq.Ft./ Employee	Total SF Needed	Floor Area Ratio*	Gross Acres Needed	Net Buildable Acres
	Industrial		174	600	104,328	0.15	16.9
Office		1,006	350	352,077	0.30	28.6	22.9
Retail		44	450	19,976	0.20	1.9	1.5
Government		39	550	21,241	0.25	2.1	1.7
Total		1,263		497,623		49.5	40.4
Scenario 2	Employment Land	New Employment	Sq.Ft./ Employee	Total SF Needed	Floor Area Ratio*	Gross Acres Needed	Net Buildable Acres
	Industrial		456	600	273,876	0.15	44.4
Office		1,304	350	456,376	0.30	37.1	29.7
Retail		335	450	150,651	0.20	14.1	11.2
Government		185	550	101,713	0.25	9.9	7.9
Total		2,280		982,615		105.5	86.6
Scenario 3	Employment Land	New Employment	Sq.Ft./ Employee	Total SF Needed	Floor Area Ratio*	Gross Acres Needed	Net Buildable Acres
	Industrial		1,149	600	689,449	0.15	111.7
Office		1,187	350	415,495	0.30	33.8	27.0
Retail		302	450	135,781	0.20	12.7	10.1
Government		222	550	122,135	0.25	11.9	9.5
Total		2,860		1,362,861		170.1	141.7

SOURCE: OED QCEW

*Floor Area Ratio (FAR) is the ratio of total usable building area relative to the total area of the site. It allows a consideration of the entire floor area of a building as opposed to its footprint.

For comparison purposes, this memorandum generalizes the net buildable land zoning from this land inventory into two categories: commercial (CBC, CG, CLI, CR, and RL zones) and industrial (I zone). The land inventory is based on the City’s zoning, each which allow for a range of employment uses. Commercial uses are allowed in most employment zones. By contrast and with few exceptions, industrial uses are limited to the I zone.

A similar generalization is done for employment land categories in the EOA: commercial (Office, Retail, Accommodation/Food, and Institutional) and industrial (Industrial). This comparison generalizes all EOA employment categories as commercial, except for the industrial employment category. Table 5 includes a preliminary comparison of the total net buildable land from this inventory with the projected need for employment land based on Phase 1 of the City’s Economic Opportunities Analysis. As summarized in the table, The Dalles has a total surplus of between 14 and 162 net acres of land when evaluating aggregate total land need and supply. The range of acres reflects a comparison of land supply with the three different land need scenarios evaluated by Competinomics shown in Figure 5.



Most of the employment demand is needed for industrial employment (demand for 14 to 95 net acres). Based on the land inventory, the City can accommodate that demand within the planning horizon with a supply of approximately 112 net acres of buildable land zoned for industrial use.

The need for commercial and other non-industrial employment land is lower, with approximately 30 to 47 net acres needed. According to the BLI, The Dalles has an estimated available supply of 89 net acres of buildable land.

TABLE 5: LAND DEMAND ACREAGE AND BUILDABLE LAND INVENTORY COMPARISON SUMMARY

Employment Zone ¹³	Estimated Net Land Demand (acres)	Net Buildable Land (acres)	Surplus/ Deficit (acres)
Commercial/ Non-Industrial	30 – 47	89	42 – 59
Industrial	14 – 95	112	17 – 98
Total	44 - 142	202	60 – 158

In addition to estimating an overall land need, Competinomics has assessed the need for sites of different sizes to meet typical industrial employment needs of target industries in The Dalles (see accompanying Attachment A).

In their assessment, Competinomics identified the need for a combination of small sites (0.1-2 acres), small/medium sites (2-8 acres), medium sites (8-60 acres), and large sites (60+ acres) to accommodate future employment growth based on average firm size. Smaller sites typically are needed for office and warehouse space with buildings that range from 3,000 to 16,000 square feet for various tenants and which come with dock and grade loading. Larger sites generally accommodate one large or a few larger manufacturing facilities. These building types have different loading and parking requirements than the smaller multi-tenanted buildings and therefore have a more efficient site layout or higher floor area ratio (FAR) than the buildings on smaller sites. While Competinomics estimates potential site need, it is important to remember that site demand varies extensively within industry sectors and many industries may need sites in different employment zones at different times or within the same time period. Due to this dynamic, to achieve results under the Target Industry/Scenario 3 forecast and particularly because it is difficult to forecast the needs of larger employers, The Dalles will need to have an adequate number of sites at all sizes. This information is described in more detail in Attachment A prepared by Competinomics.

The following table summarizes the number of vacant or partially vacant sites identified in the BLI in these size categories in the Industrial zone. Only sites in the Industrial Zone were counted. The number

¹³ Acres rounded down to whole number.



of sites for all categories are based on the number of unconstrained acres, the 50% deduction of developable land for partially vacant properties, and 15% set aside deduction for right-of-way for properties over five acres in size. The number of sites does not reflect the deductions associated with Google sites.

As summarized in the table, the City has buildable sites available in the first three categories, but does not have available sites in the 60-100 category. There are 32 small (0-2 acre) sites, five (5) small-medium (2-8 acre) sites, and five (5) medium (8-60 acre) sites available within the study area. Google owns three (3) of the five (5) vacant medium (8-60 acre) sites. This analysis indicates that while there may be enough acres of buildable land to meet the projected needed when viewed as a single combined acreage number, there are not enough sites across all site size categories and as a result not enough land in the UGB to address the need for sites in the needed sizes and configurations. The lack of sites over 20 acres in size in particular is a detriment to business recruitment and expansion across industrial sectors as has been noted during this process by members of the PAC.

TABLE 6: INDUSTRIAL SIZE CATEGORY SUMMARY, INDUSTRIAL ZONE

Development Type	0-2 acres	2-8 acres	8-60 acres	60-100 acres
Partially Vacant				
Number of Sites	11	0	0	0
Acres	14	0	0	0
Vacant				
Number of Sites	21	5	5	0
Acres	15	18	101	0
<i>Total Needed Sites¹</i>	77	14	10	1
<i>Total Number of Sites</i>	32	5	5	0
Surplus/Deficit of Sites per Size Category	(45)	(9)	(5)	(1)

¹Presents comparisons with Scenario 3 of The Dalles Twenty-Year Land Demand Forecast (2025-2045)

There is limited potential for site consolidation among industrial sites that are under five (5) acres in size. Most sites do not have common ownership and share a contiguous tax lot boundary. The sites that do have consolidation potential are primarily located on River Trail Way and owned by the Port of The Dalles. Several of the sites share contiguous tax lot boundaries and could be combined into larger sites if sold to or developed by the same owner in the future. The unconstrained acreage among these sites ranges from just under a half-acre to just under two-and-a-half acres in size.



ADDITIONAL OBSERVATIONS

- This inventory documents the supply of land within the City of The Dalles that is buildable pursuant to Oregon statutes and administrative rules. As used in this inventory, buildable land represents the capacity for additional projected employment during the next 20 years. In other words, buildable land assumes a site can accommodate increased employment growth based on the potential to increase the amount of development on a site. Land identified as buildable for the purpose of this analysis does not guarantee that identified sites are currently available for sale, lease, or development to employers or that all sites will be available during the planning period.
- Because some of the City’s larger vacant, partially vacant, and redevelopable employment sites are owned by companies that have acquired properties for development but do not have immediate plans for development and do not plan to sell or lease these properties, there is a lesser supply of properties that are more traditionally “available” for development in the short term. For example, three of the vacant medium sites (8-60 acres) are owned by Google. As a result, they are not anticipated to be available to other users but are appropriately included in the City’s 20-year supply of buildable employment land.
- A significant percentage of the land in the City’s inventory of industrial sites, particularly larger sites, are owned and planned for future use and development by Google (approximately 54.86 acres of the 112 acres of buildable industrial land). This means that just over half of the land in this inventory is available to other users. In this respect, the City has put a significant of its available industrial land in one landowner “basket” with a much smaller relative supply available to others.
- Regionally, there is a larger supply of buildable employment land, including property within the Columbia Gorge Regional Airport area. However, this land cannot be included in the BLI because it is not within The Dalles UGB.
- It will be important for the City to continue to monitor its supply of buildable land. To the extent that one or more large industrial sites are developed in the near to medium-term, such actions could result in a more significant shortage of buildable industrial land at that point.



CITY OF THE DALLES | ECONOMIC OPPORTUNITIES ANALYSIS

Revised Comprehensive Plan Goals, Policies, Actions, and Narrative

DATE July 16, 2025
 TO Joshua Chandler, City of The Dalles
 FROM Matt Hastie and Jessa Miller, MIG
 CC Ayreann Colombo, Dan Spatz, Jacob Anderson, and Sandy Freund

INTRODUCTION

This memorandum outlines the recommended revisions to *The Dalles Comprehensive Plan* goals, policies, actions, and narrative to reflect the findings of the prior phases of this Economic Opportunities Analysis (EOA), including the Land Demand Analysis and the Employment Buildable Lands Inventory (BLI). This document represents the third and final phase or major task in the process. Once this memorandum has been further refined with City Staff and the Project Advisory Committee (PAC), the team will facilitate a joint work session with the City of The Dalles Planning Commission and City Council. Once adopted, it is recommended that the City develop a short-term action plan to identify priorities for implementation.

REGULATORY BASIS

The BLI is conducted consistent with the requirements of statewide planning Goal 9 and the Goal 9 administrative rule (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 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.
2. **Industrial and commercial development policies (OAR 660-009-0020).** Cities with a population over 2,500 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 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 adopted 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.

COMPREHENSIVE PLAN REVISIONS

The following sections outline the recommended revisions to *The Dalles Comprehensive Plan*.

COMPREHENSIVE PLAN BACKGROUND DOCUMENT REVISIONS

The following documents are recommended to be updated/added to *The Dalles Comprehensive Plan, Volume II Background Documents*.

- Economic Opportunities Analysis (MIG, 2025)
- Employment and Land Needs Memorandum (Competinomics, 2025)
- Buildable Land Inventory Memorandum (MIG, 2025)

GOAL 9 NARRATIVE REVISIONS

The following revisions are recommended for the Goal 9 narrative of *The Dalles Comprehensive Plan*.

Purpose

To provide adequate opportunities throughout the State for a variety of economic activities vital to the health, welfare, and prosperity of Oregon's [citizenscommunities](#).

Background

~~As part of the 2006-07 Comprehensive Plan update, the City of The Dalles coordinated closely with the~~



~~Port District to prepare an Economic Opportunities Analysis (EOA) consistent with OAR Chapter 660, Division 9 – the Goal 9 Rule. The EOA was updated in 2011 to reflect changes in circumstances and local policy.~~

In 2025, The Dalles developed an updated Economic Opportunities Analysis (EOA) that builds upon preliminary work conducted in 2019-2023 to evaluate the City’s 20-year projected employment growth and corresponding amount of land necessary to accommodate that growth. The City of The Dalles coordinated closely with a broad range of stakeholders, including local employers and property owners, regional economic development staff, real estate professionals, and City, County and state agency representatives, to prepare an EOA consistent with OAR Chapter 660, Division 9.

Economic Overview

The Dalles economy is linked with the entire region. The City serves as the regional center for the five-county Mid-Columbia Region centrally located along the Columbia River Gorge. With a population of approximately 16,100 people as of 2025, it is the county seat and the largest city in Wasco County, Oregon. The City is well-positioned along Interstate 84, located approximately 85 miles east of Portland, Oregon and Highway 197 that connects northerly to Dallesport, Washington across the Columbia River. It is surrounded by unique natural beauty of the Gorge, farmlands, and Mt. Hood to the south.

As the end of the historic Overland Oregon Trail, The Dalles was the central location for commerce and activity within the Gorge. Today, the city continues to serve as the regional center for retail, government and institutions such as the Adventist Health Columbia Gorge, Columbia Gorge Community College, and Wasco County Courthouse. The Dalles region traditionally thrived on manufacturing industries tied to agriculture and metals such as the Harvey/Martin-Marietta aluminum smelter plant. Over time the regional economy has diversified with private investments such as those by Google, and the success of the Port attracting new business and downtown investments. In 2024, employment levels in the region were nearing pre-pandemic levels as the economy continues to recover.

Key aspects of the area’s economy and recent economic trends include the following:

- During the last two decades (2000-2025), the regional economy of The Dalles has diversified with the closure of the Northwest Aluminum Specialties aluminum plant and more recent significant private investments.
- Since 2020, national and state employment have grown by 2.1% and 1.7%, respectively. Employment in the MCEDD region has increased by 1.4%. Between 2015 and 2020, the region had been experiencing a strong recovery from the 2008-09 recession adding 2,445 jobs resulting in a 2.0% annual growth rate. When not confronting the challenges of major economic disruptions such as the Great Recession or COVID pandemic, employment growth has been strong in most of the region’s counties. According to forecasting from the Oregon



Employment Department and Washington Employment Security Department, the MCEDD region is expected to grow at about 0.9% annually through 2033.

- As of 2022, the median age in The Dalles is 38.5, which is slightly younger than The Dalles was trending during the 2010s. Further, The Dalles is slightly younger than the overall MCEDD region, which averages a median age of 43.6. Maintaining a relatively younger population will be important to the city's future economic and employment growth prospects in that the city will have a balanced proportion of prime-age working adults to maintain and spur a sustainable level of economic activity.
- Between 2004 and 2019, employment growth in The Dalles slightly outpaced population growth at an average of 1.5% annually. Since dropping by 6.3% in 2020, employment in The Dalles has recovered at an annual average rate of 1.2%. The Dalles's share of Wasco County employment stands at 77% which is a slight increase from about 73% in 2006.
- Wage growth in The Dalles has increased by 4.1% annually during the last 10 years, following U.S. and statewide trends.
- Of the 4,969 workers who commute to The Dalles for jobs as of 2022, the most prevalent areas in which workers live are Hood River/White Salmon area, Portland metro area, Goldendale and Eugene, Salem and Bend. Of the 4,889 residents who commute for work elsewhere as of 2022, the majority of those residents are commuting to the Portland metro area, Hood River/White Salmon area, Salem, Bend/Redmond, Eugene and to cities to the east.
Recent Economic History
- As of 2022, The Dalles exceeds statewide percentages (38% versus 34%, respectively) of residents with post-secondary or associate's degree education. On the other hand, the percent of residents with a bachelor's degree or higher is significantly below statewide and regional levels but has been improving over the last ten years. The degree to which The Dalles is able to maintain or grow future economic activity will depend on the community's ability to attract and retain residents with bachelor's degrees and/or targeted post-secondary education levels.
- Since 2018, The Dalles has had an influx of residents (new or newly experienced and/or trained) with skills in a diverse range of sectors. According to occupational projections produced by the Oregon Employment Department, through 2033, The Dalles is expected to have about 550 new openings for various occupational skills. Total demand for occupations, including replacements, will be greatest in "Service" occupations, primarily in Food Preparation and Personal Care. Health Care and Management, Business, Financial and Professional related occupational skills will be in high demand as well.



The Dalles is Wasco County's primary municipality and is the major employment center of the County. The community has a broad spectrum of diversified employment opportunities underpinned by a base of small industrial/manufacturing companies.

Major employers in The Dalles include Google, the Mid-Columbia Medical Center, The State of Oregon, Fred Meyer, Bi-Mart, K-Mart, Oregon Cherry Growers, Union Pacific Railroad, and several branches of the U.S. Government. Recent events which are expected to influence economic conditions and employment in The Dalles include changes in the economic base and new supporting public facilities.

The \$66,096,000 annual (2006) production and processing of fruit and grain remains a staple for Wasco County, and agribusiness is expected to remain a strong economic influence on The Dalles. Value-added development allows for expansion and retention of these agricultural industries.

In 1988 a location one mile west of The Dalles was selected as the site for the Columbia Gorge National Scenic Area Interpretive Center ("Gorge Discovery Center"). Opened in 1997, the facility includes the Wasco County Museum and attracts tens of thousands of visitors each year and offers many educational programs and special exhibits.

In 1993 a \$7.8 million general obligation bond passed, allowing the Columbia Gorge Community College to purchase the former Judson Baptist College site to establish its first campus. Since then, the campus has continued to improve, and student numbers have continued to increase. In 2006, an \$18,000,000 bond was passed which will be used to upgrade existing buildings and build new ones as the college continues to expand. Program development can provide vocational training to aid business and industrial advancement through work force education and apprenticeships.

An aging population, together with in-migration of retirees, will provide opportunities and challenges as more people retire to and in The Dalles. As one of five medical facilities in the nation to adopt the "Planetree" concept (providing for patient involvement in treatment), Mid-Columbia Medical Center acts as a magnet for quality medical services and specialties. A recent addition to the Medical Center is the Cancer Treatment Center, a state-of-the-art facility. Another recent addition to MCMC includes a Mind/Body Center, which focuses on non-traditional treatments and lifestyle programs.

In 1990, The Dalles adopted an urban renewal plan to provide new infrastructure, upgrade conditions, and attract new investment to the downtown commercial area. About \$8,000,000 has been invested in the downtown area including streetscape work, historic building restoration and riverfront access.



The upsurge of windsurfing in the Mid-Columbia since the 1980s brought a modest windfall to the Wasco County economy, adding an additional recreation opportunity to the existing sports of fishing, hunting, rafting and hiking. A west side interchange from I-84 was built to service the Discovery Center and the Port Industrial Center. The Dalles is well served by existing rail, river, and air transport.

In 1993, and updated in 2002, The Dalles created a community vision statement and action plan to help define its preferred future and initiate action to achieve a more attractive and efficient City. The Dalles is uniquely situated with access via two interstate highways, the river, rail, and air. New developments, such as airport expansion, will improve upon the geographic advantages of the area.

In 2005, the City and Klickitat County, Washington, joined together to improve the airport with the long-term goal of making the airport financially self-sufficient. A new Regional Airport Board was established and given additional responsibilities and powers to further the goal. This new management structure will serve the airport, the local economy, and the flying public well for many years to come. With over 500 acres of developable land, the airport represents a huge economic development opportunity. Planned on the airport property is a world-class golf course with related resort activities to be developed on adjacent property.

Significant commercial development activities occurred between 1982 and 2006, primarily along West Sixth Street, including two major Fred Meyer expansions, a 24,000 square foot Home Depot store, a new Safeway store, Walgreens, Columbia River Bank branch, Chevrolet dealership, medical facility, Staples, K Mart, Bi Mart, Wal-Mart and several other smaller commercial developments. A motel, market, and service station were constructed near the Highway 197/I-84 intersection. During the same 10-year period, the Port's industrial land base has been completely developed. Development included a major Google technology center, two major manufacturing facilities, and several existing business expansions. Northwest Aluminum Specialties, Interior Motor Freight, United Parcel Service and expansion of existing facilities for Precision Lumber, Cargill Grain, and several more smaller industries have developed on non-Port industrial lands. All of the industrial developments have occurred within or adjacent to the Port's Industrial Center.

Google's recent decision to locate in The Dalles provides the basis for high technology cluster industries. The closing of Northwest Aluminum resulted in the loss of jobs, but also created new industrial and commercial employment sites with river, rail and highway access.



Economic Forecast

~~Based on these changing conditions, the following findings describe probable future shifts in employment, and new economic opportunity areas. The Dalles will diversify its economy, recognizing the necessity for family wage jobs which create wealth while acknowledging the opportunities for secondary service jobs within a balanced framework. Based on its five county regional trade area, The Dalles is situated as the hub of a 75,169 person market (2000 Census: Hood River, Wasco, and Sherman Counties in Oregon, Klickitat and Skamania Counties in Washington). As the largest City within this area, The Dalles is the retail trade center for the Mid-Columbia Region.~~

~~The Dalles will maintain its long time position as a regional retail trade center. Adequate commercial spaces, both undeveloped and redevelopable, should support anticipated growth. Tourism growth presents an opportunity to diversify the local economy. Facilities including the Gorge Discovery Center, Wasco County Museum, Riverfront Park and Trail, a wide variety of historic resources and properties, and abundant recreational opportunities provide the basis for this growth area. In addition, community attitudes drawn from the vision statement indicate a desire to improve the livability and attractiveness of The Dalles. The action plan will help carry out the vision.~~

~~The economy of an aging population will provide opportunities in services and housing, further supporting The Dalles and the Mid-Columbia Medical Center as the hub of medical services in the Mid-Columbia Region. The creation of a campus and additional buildings for the Columbia Gorge Community College will allow for growth and development of the community's education capabilities, focusing on work force training tailored to business and manufacturing needs that support a balanced economy.~~

~~Agribusiness will continue to remain as a strong influence on the local economy, with the potential of creating additional processing and packaging facilities to support new manufacturing jobs.~~

~~Industrial and Commercial Land Use Needs~~



~~In order to capitalize on long-range economic and employment shifts, The Dalles will need to add to its existing supply of land for commercial uses within the UGB. Similar conversions of Port industrial lands along the riverfront can produce a mixed-use area to accommodate a slightly different market, including freeway commercial and recreational users. Smaller gains are provided through the use of Neighborhood Centers to allow residential and neighborhood commercial uses to develop near focal intersections in town. Finally, The Dalles has voiced a desire to accommodate reasonable home business opportunities that can provide an affordable start-up location for emerging businesses.~~

~~The Northwest Aluminum site provides an excellent commercial and industrial redevelopment opportunity and will be able to meet The Dalles' need for large employment sites over the next 20 years. Since this employment lands inventory was completed, potential wetlands have been discovered that may have the effect of reducing the supply of suitable commercial and industrial land within The Dalles UGB. The City is committed to completing a local wetlands inventory (LWI) over the next several years to determine more accurately the supply of suitable employment land within The Dalles UGB. If the supply of suitable employment land falls below the 20-year need as identified in The Dalles EOA, the City will take steps to ensure an adequate supply of suitable employment land, including possible UGB amendments.~~

~~**Economic Opportunities Analysis (2006)**~~

~~In 2006, the City of The Dalles contracted with Winterbrook Planning and ECONorthwest, a land-use economics consulting firm, to prepare an updated Economic Opportunities Analysis (EOA) consistent with the requirements of Statewide planning Goal 9 and the Goal 9 administrative rule (OAR 660-009 as revised in December 2005). The 2011 EOA is included as a Background Document in Volume II of The Dalles CLUP.~~

~~The EOA includes a 20-year forecast of employment for The Dalles. It provides technical information that will help articulate the City's economic development policy and determine whether the City has an adequate inventory of industrial sites within its Urban Growth Boundary (UGB) to accommodate employment growth over the 20-year planning period. The 2011 EOA reports industries that have shown recent growth and business activity in Oregon—and which may locate or expand in The Dalles. The EOA also identifies locational characteristics that will help determine the types of businesses most likely to locate in The Dalles during the 20-year planning period:~~

- ~~• The presence and expected growth of the Columbia Gorge Regional Airport could help The Dalles attract businesses engaged in the manufacture and service of aircraft, avionics, and related equipment.~~



- ~~The Dalles' semi-rural setting, access to I-84 and other modes of transportation, and workforce availability make The Dalles attractive to businesses in manufacturing. Examples include high tech electronics, food processing, industrial equipment, recreational equipment, and other specialty manufacturing.~~
- ~~Access to transportation, including the access to I-84, the railroad, barges, and the airport, makes The Dalles attractive to businesses in the warehousing and transportation sector. Large warehouse facilities that serve large areas appear to favor more central settings, such as the Willamette Valley. The Dalles is more likely to attract more modest facilities that serve a smaller geographic region or that specialize in fewer goods.~~
- ~~The Dalles' attractive semi-rural setting and quality of life could make it a location for professional, scientific and technical services, which are attracted to areas with high quality of life. Examples include software design, engineering, and research.~~
- ~~The Dalles' setting within the Columbia River Gorge, access to a variety of outdoor recreation, and the growing presence of viniculture make The Dalles attractive to tourists. Industries that serve tourists, such as food services and accommodations, are likely to grow if tourism increases.~~
- ~~The comparatively low cost and high availability of electricity, water, and high speed internet connection (via the Q life fiber optic loop) could make The Dalles attractive to businesses engaged in specialty manufacturing or technology related businesses.~~
- ~~The Dalles is the largest City in the Gorge, and it will continue to serve as a regional center for retail, services, and government.~~
- ~~As a regional center for retail shopping, The Dalles will experience demand for development of big box and mid-sized retail stores, primarily for grocery, general merchandise, and home improvement stores. The Dalles will continue to be the location for regional institutions such as the Mid-Columbia Medical Center, the Columbia Gorge Community College, Wasco County Courthouse, and other government offices.~~

The 2011 EOA identified potential growth industries for The Dalles as follows.

- Retail and Services. ~~The State's nonfarm employment forecast for 2004 to 2014 projects that more than half of employment growth in Region 9, which includes Wasco County, will be in retail and services. As a regional center for retail and services, The Dalles may attract the following industries:~~
 - ~~The Dalles may be attractive to big box and mid-sized retail. The Dalles may have growth in small and specialty retail shops and offices for business, professional, and health care services as population increases.~~



- ~~The Dalles' setting within the Columbia River Gorge, access to a variety of outdoor recreation, and the growing presence of viniculture make The Dalles attractive to tourists. Industries that serve tourists, such as food services and accommodations, are likely to grow if tourism increases.~~
- ~~The Dalles may be attractive for firms engaged in professional, scientific and technical services, such as software design, engineering, and research.~~
- ~~**Government.** The State's nonfarm employment forecast for 2004 to 2014 projects that growth in government will account for about one third of employment growth in Region 9, including Wasco County. The Dalles may see employment growth in government for the following reasons:~~
 - ~~The Dalles will continue to be the location for regional institutions such as the Columbia Gorge Community College, Wasco County Courthouse, and other government offices.~~
 - ~~The Dalles will have growth in local government as population increases. Assuming that families with young children locate in The Dalles, growth in local government is likely to be dominated by education.~~
- ~~**Industrial.** The State's non farm employment forecast for 2004 to 2014 projects that growth in industrial sectors will account for the smallest portion of employment growth in Region 9, which includes Wasco County. The Dalles has comparative advantages, such as location and access to transportation, that may contribute to the growth in employment in the following industries:~~
 - ~~The Dalles should be attractive for firms engaged in a range of specialty manufacturing, including aircraft, high tech electronics, food processing, industrial equipment, and recreational equipment.~~
 - ~~The Dalles should also be attractive for firms engaged in warehousing and distribution. The Dalles is more likely to attract more modest facilities that serve a smaller geographic region or that specialize in fewer goods.~~
 - ~~The Dalles may be attractive to industries that need large amounts of electricity from stable sources.~~
 - ~~Table 9-1 shows a summary of vacant and partially redevelopable commercial and industrial lands within The Dalles UGB. The table shows that The Dalles has a total of about 109 acres of vacant land, including 79 acres of vacant industrial land and about 30 acres of vacant commercial land.~~

Table 9-1 shows that The Dalles has an estimated 350 gross acres of potentially redevelopable land,



including:

- ~~129 acres of redevelopable commercial land,~~
- ~~221 acres of redevelopable industrial land (almost entirely on the Northwest Aluminum site), and~~
- ~~19 acres of land designated for mixed commercial and residential use, which could be redeveloped for commercial uses.~~

~~Table 9-1. Summary of Buildable Commercial and Industrial Land in The Dalles UGB, 2006~~

Commercial and Industrial	
Vacant	89.04
Commercial Vacant	28.87
Industrial Vacant	60.17
Potentially Redevelopable	341.50
Commercially Redevelopable	75.88
Industrial Redevelopable	265.62
Mixed Use	18.81
Total	449.35

~~Source: The City of The Dalles, 2006~~

~~Since this employment lands inventory was completed, potential wetlands have been discovered that may have the effect of reducing the supply of suitable commercial and industrial land within The Dalles UGB. The City is committed to completing a local wetlands inventory (LWI) over the next several years to determine more accurately the supply of suitable employment land within The Dalles UGB. If the supply of suitable employment land falls below the 20 year need as identified in The Dalles EOA, the City will take steps to ensure an adequate supply of suitable employment land, including possible UGB amendments.~~

~~Table 9-2 shows demand for employment land in The Dalles UGB by land use type for the 2006-2026 period. The results show that The Dalles will need 278 gross acres of land for employment within its UGB for the 2006-2026 period.~~

~~Table 9-2. Estimated Demand for Employment Land in The Dalles, 2006-2026~~

Land Use Type	Growth	Emp- Growth No-Land Demand	Emp-Growth with Land-Demand	Emp-per Net-Acre	Land-Demand
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2006-2026					Net Acres	Gross Acres
Retail and Services	2,196	220	1,976	18	110	146
Industrial	950	95	855	10	86	114
Government	541	54	487	12	41	54
Total	3,687	369	3,318		236	314

Source: ECONorthwest, Winterbrook

Table 9-3 estimates distribution of future employers by size and site needs. The analysis does not distinguish between industrial and other employment types; it is likely that many larger employers (>50 employees) will generally want industrial sites.

The Dalles will need four sites of 6 to 35 acres in size during the 2006-2026 period. While the City will also need a lot of smaller sites, this need can be met by smaller firms that co-locate in office buildings or on retail sites, or locate in industrial parks. Thus, a few of the larger sites in the inventory will be divided to meet identified needs for smaller sites.

Table 9-3-
Estimated Distribution of Future Employers by Size and Site Needs, The Dalles, 2006-2026

Number of Employees	Est # of Firms New	New Emp	Sites Needed	Site Size Range	Avg Site Acres (net)	Net Acres Needed	Gross Acres Needed
0 to 9	155	697	104	<1 ac	0.5	47	55
10 to 24	49	829	33	0.5 to 2.5	1.5	49	57
25 to 49	17	630	12	1 to 5	3.1	38	44
50 to 99	5	365	4	3 to 10	6.3	25	30
100 or more	4	796	4	6 to 35	20.3	81	95
Total	229	3317	157			240	282

Source: Estimates by ECONorthwest

In 2006, The Dalles had about 449 acres of vacant and redevelopable land designated for industrial and other employment uses. Of these, about 89 acres were vacant—60 acres designated for industrial uses and 29 acres designated for commercial uses. The demand analysis above concluded that The Dalles needs 282 acres for the 2006-2026 period.

Table 9-4 compares identified site needs with available sites for the 2006 through 2026 period. The results suggest that The Dalles has a surplus of acreage available for industrial and other uses. For the 2006-2026 period, the City will need a considerable number of smaller sites, and will need to use some of its larger sites to meet the small site deficit. Finally, the City has an identified need for a regional commercial center with access to I-84, a neighborhood commercial node to serve planned residential



growth, and a business park to meet employment needs through 2026. The regional commercial center need was met through the Wal-Mart rezoning in 2007-08.

Table 9-4.
Comparison of site needs and site supply, The Dalles UGB, 2006-2026

Site-Size- Range	Average- Site-Size	Sites- Needed	Net- Acres- Needed	Supply:- Sites	Supply:- Net- Acres	Needed- Sites- Surplus- (def)	Needed- Acres- Surplus- (def)
<10	1	153	159	18	74	(135)	(84)
>10	20	4	81	10	210	6	129
Non-site					49		49
Total		157	240	28	334		94

The 2006 EOA has several implications for the City of The Dalles. Following are the key implications:

- The City has an overall surplus of employment land. Considering regional development trends and State and City policies concerning economic development, the City should maintain an adequate number of large sites within its existing industrial land base to accommodate future employment growth.
- Topographic constraints in areas adjacent to the UGB limit the number of large industrial sites that the City could possibly expand into. The City is committed to a long-term redevelopment strategy for existing industrial areas. The Dallesport Industrial Park is not a viable long-term industrial strategy for The Dalles because it is in another State and distant from housing and services.
- The City should amend its zoning regulations to restrict commercial uses in relatively scarce industrial areas.
- The City will also establish a new business park designation that could accommodate office uses as well as certain light manufacturing uses and a master-planned setting.
- The City will continue to emphasize the historic downtown area as the government, specialized retail, office and tourist center.

Findings and Conclusions

This Plan recognizes that local policy also has an effect on the type and distribution of employment. In summary, the primary findings and conclusions are:



- ~~The Dalles is well positioned to benefit from an increase in service, retail and tourism activity through the Columbia Gorge Discovery Center, The Dalles Riverfront Park and Trail, Google clusters, area sporting activities, and historic points of interest.~~
- ~~New commercial development and retail leakage from Washington State will help strengthen The Dalles as the retailing center of the Mid-Columbia Region. The Columbia Gorge Community College and the Mid-Columbia Medical Center make The Dalles the health care and educational center for the region and are important work force training centers.~~
- ~~Within The Dalles UGB, approximately 450 commercial and industrial acres are suitable for employment purposes, including potentially redevelopable land at the Northwest Aluminum site and elsewhere. Incentives such as job creation credits, the enterprise zone, and others should continue to be emphasized for industrial land development, and the creation and retention of family wage jobs. Since this employment lands inventory was completed, potential wetlands have been discovered that may have the effect of reducing the supply of suitable commercial and industrial land within The Dalles UGB. The City is committed to completing a local wetlands inventory (LWI) over the next several years to determine more accurately the supply of suitable employment land within The Dalles UGB. If the supply of suitable employment land falls below the 20-year need as identified in The Dalles EOA, the City will take steps to ensure an adequate supply of suitable employment land, including possible UGB amendments.~~
- ~~The Dalles holds a substantial asset in its serviced industrial property within the existing UGB. This asset should be held for its long-term value to the economy.~~

The EOA is comprised of two primary components, each developed separately and then integrated for the purposes of future planning. The first element focuses on the forecasted employment growth opportunities and estimated amount of demand for new land through the year 2045. The second component of the EOA evaluated the supply of land to meet this anticipated growth and land demand. In accordance with the Department of Land Conservation and Development (DLCD), only land within Oregon can be considered as part of the phase two supply evaluation. No Washington lands may be considered as part of the evaluation.

Both elements of the EOA were completed in accordance with the requirements of Statewide Planning Goal 9 and OAR 660-009-0015. The objective of an EOA is “to identify likely industrial and other economic development opportunities and corresponding employment land needs over the planning period of the next 20 years” through an analysis of national, state, regional and local trends and the establishment of community vision, goals, and objectives.

The projection of employment growth and the resulting land demand through the year 2045 was



[developed based on economic and community trends, Oregon Employment Department employment projections, historical employment growth in The Dalles, regional five-county economic development district \(Mid-Columbia Economic Development District region\) data, and community input.](#)

[Table 9-1 shows a summary of vacant and partially vacant employment lands within The Dalles' UGB. As of 2025, The Dalles had an estimated **202** net acres of vacant and partially vacant land designated for industrial and other employment uses. Of this land, about **189** acres were vacant and **13** acres were partially vacant with **112** acres designated for industrial uses and **90** acres designated for commercial uses \(Table 9-1\).](#)

[Table 9-1. Gross and Net Developable Acres of Employment Land \(2025\)](#)

<u>Employment Zone</u>	<u>Partially Vacant Land</u>		<u>Vacant Land</u>		<u>Total Buildable Land</u>
	<u>Gross</u>	<u>Net</u>	<u>Gross</u>	<u>Net</u>	
<u>CBC</u>	<u>2.6</u>	<u>1.3</u>	<u>1.8</u>	<u>1.5</u>	<u>2.7</u>
<u>CG</u>	<u>4.1</u>	<u>2.0</u>	<u>19.9</u>	<u>15.9</u>	<u>17.9</u>
<u>CLI</u>	<u>4.8</u>	<u>2.4</u>	<u>47.1</u>	<u>37.7</u>	<u>40.1</u>
<u>CR</u>	<u>0.2</u>	<u>0.1</u>	<u>35.9</u>	<u>28.8</u>	<u>28.8</u>
<u>I (subtotal)</u>	<u>14.1</u>	<u>7.0</u>	<u>123.5</u>	<u>105.0</u>	<u>112.0</u>
<i><u>Google Sites</u></i>	<i><u>0.0</u></i>	<i><u>0.0</u></i>	<i><u>53.0</u></i>	<i><u>45.1</u></i>	<i><u>45.1</u></i>
<i><u>Other Sites</u></i>	<i><u>14.1</u></i>	<i><u>7.0</u></i>	<i><u>70.5</u></i>	<i><u>59.9</u></i>	<i><u>67.0</u></i>
<u>Total</u>	<u>25.6</u>	<u>12.8</u>	<u>228.3</u>	<u>188.8</u>	<u>201.6</u>

[Table 9-2 shows the land demand forecast to estimate the demand for employment land. As shown, land demand is estimated under three employment growth scenarios.](#)



Table 9-2. The Dalles Land Demand Forecast (2025-2045)

Scenario 1	Employment Land	New Employment	Sq.Ft./ Employee	Total SF Needed	Floor Area Ratio*	Gross Acres Needed	Net Buildable Acres
	Industrial		174	600	104,328	0.15	16.9
Office		1,006	350	352,077	0.30	28.6	22.9
Retail		44	450	19,976	0.20	1.9	1.5
Government		39	550	21,241	0.25	2.1	1.7
Total		1,263		497,623		49.5	40.4
Scenario 2	Employment Land	New Employment	Sq.Ft./ Employee	Total SF Needed	Floor Area Ratio*	Gross Acres Needed	Net Buildable Acres
	Industrial		456	600	273,876	0.15	44.4
Office		1,304	350	456,376	0.30	37.1	29.7
Retail		335	450	150,651	0.20	14.1	11.2
Government		185	550	101,713	0.25	9.9	7.9
Total		2,280		982,615		105.5	86.6
Scenario 3	Employment Land	New Employment	Sq.Ft./ Employee	Total SF Needed	Floor Area Ratio*	Gross Acres Needed	Net Buildable Acres
	Industrial		1,149	600	689,449	0.15	111.7
Office		1,187	350	415,495	0.30	33.8	27.0
Retail		302	450	135,781	0.20	12.7	10.1
Government		222	550	122,135	0.25	11.9	9.5
Total		2,860		1,362,861		170.1	141.7

SOURCE: OED QCEW, Competinomics

Table 9-3 compares identified land demand with available sites through the 2045 period. The results suggest that The Dalles has a surplus of acreage available for industrial and other uses under all three land need scenarios when demand is measured in the aggregate. Approximately 14 to 95 net buildable acres of land zoned for industrial uses is needed to accommodate demand depending on the scenario. Based on the employment land inventory, the City can accommodate that demand within the planning horizon with a supply of approximately 112 net acres of buildable land zoned for industrial uses. The need for commercial and other non-industrial employment land is approximately 30 to 47 acres of needed land depending on the scenario. The buildable land inventory shows an estimated supply of 90 acres of buildable land to meet the forecasted commercial and other non-industrial employment land demand.



Table 9-3. Land Demand Acreage and Buildable Land Inventory Comparison Summary

<u>Employment Zone¹</u>	<u>Estimated Net Land Demand (acres)</u>	<u>Net Buildable Land (acres)</u>	<u>Surplus/ Deficit (acres)</u>
<u>Commercial/ Non-Industrial</u>	<u>30 – 47</u>	<u>89</u>	<u>42 – 59</u>
<u>Industrial</u>	<u>14 – 95</u>	<u>112</u>	<u>17 – 98</u>
<u>Total</u>	<u>44 - 142</u>	<u>202</u>	<u>60 – 158</u>

The City's EOA identified the need for a combination of small sites (0.1-2 acres), small/medium sites (2-8 acres), medium sites (8-60 acres), and large sites (60+ acres) to accommodate future employment growth based on average firm size. Smaller sites typically are needed for office and warehouse space with buildings that range from 3,000 to 16,000 square feet for various tenants and which come with dock and grade loading. Larger sites generally accommodate one large or a few larger manufacturing facilities. These building types have different loading and parking requirements than the smaller multi-tenanted buildings and therefore have a more efficient site layout or higher floor area ratio (FAR) than the buildings on smaller sites. While the EOA analysis estimates potential site need, it is important to remember that site demand varies extensively within industry sectors and many industries may need sites in different employment zones at different times or within the same time period. Due to this dynamic, to achieve results under the Target Industry/Scenario 3 forecast and particularly because it is difficult to forecast the needs of larger employers, The Dalles will need to have an adequate number of sites at all sizes.

As summarized in the table, the City has buildable sites available in the first three categories, but does not have available sites in the 60-100 category. There are 32 small (0-2 acre) sites, five (5) small-medium (2-8 acre) sites, and five (5) medium (8-60 acre) sites available within the study area. Google owns three (3) of the five (5) vacant medium (8-60 acre) sites. This analysis indicates that while there may be enough acres of buildable land to meet the projected needed when viewed as a single combined acreage number, there are not enough sites across all site size categories and as a result not enough land in the UGB to address the need for sites in the needed sizes and configurations. The lack of sites over 20 acres in size in particular is a detriment to business recruitment and expansion across industrial sectors as has been noted during the EOA process by project stakeholders.

¹ Acres rounded down to whole number.



Table 9-4 Industrial Site Size Category Summary, Industrial Zones

<u>Development Type</u>	<u>0-2 acres</u>	<u>2-8 acres</u>	<u>8-60 acres</u>	<u>60-100 acres</u>
<u>Partially Vacant</u>				
<u>Number of Sites</u>	<u>11</u>	<u>0</u>	<u>0</u>	<u>0</u>
<u>Acres</u>	<u>14</u>	<u>0</u>	<u>0</u>	<u>0</u>
<u>Vacant</u>				
<u>Number of Sites</u>	<u>21</u>	<u>5</u>	<u>5</u>	<u>0</u>
<u>Acres</u>	<u>15</u>	<u>18</u>	<u>101</u>	<u>0</u>
<u>Total Needed Sites¹</u>	<u>77</u>	<u>14</u>	<u>10</u>	<u>1</u>
<u>Total Number of Sites</u>	<u>32</u>	<u>5</u>	<u>5</u>	<u>0</u>
<u>Surplus/Deficit of Sites per Size Category</u>	<u>(45)</u>	<u>(9)</u>	<u>(5)</u>	<u>(1)</u>

¹Presents comparisons with Scenario 3 of The Dalles Twenty-Year Land Demand Forecast (2025-2045)

Findings: Key Themes, Strengths, and Challenges

The following key themes emerged as important topics among stakeholders or were identified through research as unique assets to the region that should be noted. In sum, The Dalles is well positioned to support a growing, sustainable, and diversified economy within the Gorge. While productive sectors in The Dalles are still recovering from disruptions in 2020, they have a track record of recovery and dynamism that can be expected to return in the future if there exists an environment that supports growth. Continued local investments in the foundational components of thriving communities such as adequate and modern infrastructure, diverse and efficacious educational opportunities and space for development will ensure projected employment growth and opportunity for local residents.

In summary, the primary key themes, strengths, and challenges are:

Key Themes

- Strong Infrastructure – As evidenced by the Google data center investment, The Dalles is fortunate to have strong broadband and electrical power infrastructure that is provided through non-carbon emitting hydro-power. These assets are significant and should be promoted to encourage continued business investment.
- Columbia Gorge Regional Airport Business Park – The City of The Dalles, Oregon and Klickitat County, Washington jointly own Federal Aviation Administration (FAA) regulated 994-acre facility located in unincorporated Dallesport, Washington. The airport is surrounded by a 90-acre business park, which consists of shovel ready lots currently served with utilities and



roads. Some of the parcels must be used for aviation-related purposes but others can be used for general industrial purposes.

- Columbia Gorge National Scenic Area (NSA) – This is a unique federal designation that pertains to both states of Oregon and Washington. The intent of the NSA is to protect and provide for the enhancement of the scenic, cultural, recreational and natural resources of the Gorge; and to protect and support the economy of the Columbia River Gorge area by encouraging growth to occur in existing urban areas (shaded gray on the maps) and thereby allowing future economic development to occur. Industry leaders conveyed that the Gorge and surrounding recreation is a huge asset for talent attraction. The scenic area serves to protect a significant asset but must be balanced with the need for growth. Stakeholders noted that the Gorge Commission views the NSA urban areas holistically (not by state boundaries) and agreed that this regional perspective is appropriate as the two areas complement each other through various services, housing and job opportunities that benefit workers and employers on both sides of the river.
- Pendleton UAS Range (PUR) - PUR is a partner test site within the University of Alaska Fairbanks (UAF) led Pan-Pacific UAS Test Range Complex, one of seven FAA permitted UAS Test Sites in the country. This facility is located approximately 125 east of The Dalles along Interstate 84. PUR is an important element in growing the UAS industry cluster. Continued collaboration, support and promotion of the facility on an ongoing basis is encouraged. The PUR director indicated that several out-of-state companies utilize the test range and may want a second location near the facility. A win-win collaboration between Pendleton and The Dalles will expand the offering of office/industrial sites available to out of state investors. Future outreach to the Warm Springs UAS Range, which has more limited service offerings, could be considered as well.

Strengths and Opportunities

- The Dalles is fortunate to be situated as a regional hub serving many of the smaller communities in the region. Its relatively larger economy offers a diversity of industries and talent that enable it to recover from economic shocks and begin to grow again.
- As noted previously, the Dalles has excellent broadband availability and water and power capacity. The Columbia River Gorge is an exceptional asset by which to draw visitors and new residents who want access to varied outdoor recreational activities. Despite an acute lack of housing, The Dalles has added population and has increased its labor force participation during the last ten years.
- The Columbia Gorge Regional Airport and the Business Park is a significant opportunity for growth in the aviation and manufacturing sector. The Columbia Gorge Community College



has strong ties to the community and programs meant to support employer needs, changing industrial dynamics and the goals of its students.

Challenges

- The most significant challenge for The Dalles is the lack of housing and land available for housing and employment growth. Given constraints due to the National Scenic Area and other land use restrictions, overcoming this challenge will require significant efforts by stakeholders to maximize infill development and work with regulators to expand development options. Further development options, and the tax revenues that accompany them, are critical for reducing the cost of housing as well as investing in and maintaining the infrastructure and talent development that provide the foundations for economic growth and a thriving community.
- A further challenge in The Dalles is a lack of childcare providers. This issue is not unique to The Dalles and creative measures to reduce costs for childcare businesses in the short run is likely needed for the childcare sector to gain momentum wherein revenues can more closely cover costs.
- While The Dalles has a strong downtown form, it also has significant investment opportunities. Efforts to incentive these investments will go far in presenting a community that continues to invest in itself and maintains optimism for the future.

GOAL 9 GOAL, POLICY, AND IMPLEMENTATION MEASURE REVISIONS

The following revisions are recommended for the Goal 9 economic development goals, policies, and implementation measures of *The Dalles Comprehensive Plan*. Due to the proposed reorganization of the goals, policies, and implementation measures recommended text is included immediately below (see NEW RECOMMENDED TEXT) and ~~striketrough~~ text from the existing Comprehensive Plan is included at the end of this document (see STRIKETHROUGH Text).

NEW RECOMMENDED TEXT

The following goals and policies are designed to support The Dalles long-term economic health and are aligned with the community's vision for 2040, particularly in the areas of economic vitality, education, livability, and infrastructure investment.

Goal 1: Expand and Diversify the Economic Base

Policy 1.1: Promote growth in traded-sector industries including advanced manufacturing, high technology, and value-added agriculture.



Implementation Measures:

- Work with MCEDD and industry groups to identify sector-specific needs.
- Prepare and regularly update a shovel-ready employment lands inventory.
- Prioritize public infrastructure investment in areas targeted for traded-sector growth.

Policy 1.2: Support entrepreneurship, innovation, and business start-ups.

Implementation Measures:

- Support downtown co-working spaces and startup events.
- Develop zoning allowances for home-based businesses and flexible commercial space.
- Support maker spaces and digital hubs.

Policy 1.3: Protect and plan for long-term industrial land supply.

Implementation Measures:

- Preserve key industrial areas (e.g., Port lands).
- Create policies to avoid premature conversion of industrial land to non-industrial uses.
- Identify a replacement strategy for industrial lands lost to redevelopment.
- Increase the supply of industrial sites to ensure opportunities to attract target industry businesses.

Goal 2: Grow and Attract a Skilled Workforce

Policy 2.1: Strengthen education and workforce development pathways.

Implementation Measures:

- Partner with CGCC and STEM Hub to align programs with target industry needs.
- Support internship and pre-apprenticeship programs tied to local employers.
- Expand youth engagement in technical careers.

Policy 2.2: Support housing, childcare, and amenities that enable workforce participation.

Implementation Measures:

- Integrate economic goals with the City's Housing Needs Analysis.
- Encourage mixed-income and workforce housing near employment centers.
- Develop partnerships or incentives for childcare expansion.
- Ensure that the City's Development Code allows childcare businesses to be located throughout the City consistent with state requirements and local goals.



Goal 3: Strengthen and Activate Downtown and Community Destinations

Policy 3.1: Reinforce downtown as a mixed-use employment and cultural center.

Implementation Measures:

- Encourage vertical mixed-use development and upper-floor reuse.
- Evaluate parking minimum reductions in core areas.
- Align investments with the Downtown Urban Renewal Plan and Urban Renewal priorities.

Policy 3.2: Promote local-serving and visitor-serving businesses.

Implementation Measures:

- Attract retailers, food and beverage operators, and experience-based businesses.
- Support adaptive reuse of historic structures.
- Improve wayfinding and public space amenities to enhance business access.

Policy 3.3: Leverage the Columbia Gateway Urban Renewal District to catalyze downtown redevelopment and economic revitalization.

Implementation Measures:

- Prioritize infrastructure and building investments that align with long-term economic development objectives and private reinvestment potential.
- Use the Urban Renewal incentive program to encourage upper-floor housing, façade upgrades, and active ground-floor uses.
- Coordinate Urban Renewal projects with business recruitment, plaza activation, and streetscape improvements.

Goal 4: Ensure Economic Development Readiness and Resilience

Policy 4.1: Make it easier to develop in The Dalles.

Implementation Measures:

- Streamline permitting processes for expansions and site reuse.
- Provide predevelopment assistance for catalytic sites.
- Regularly update the City's economic development web resources.

Policy 4.2: Plan for long-term resilience and adaptability.



Implementation Measures:

- Incorporate hazard mitigation and utility redundancy into infrastructure and land use planning.
- Encourage redevelopment strategies that incorporate infrastructure layouts and long-term adaptability for changing industry needs.
- Monitor and report progress using economic metrics (e.g., land absorption, job growth, participation rates).

Goal 5: Grow the Green Economy and Technology Innovation Sector

Policy 5.1: Leverage existing tech and infrastructure investments to support green and digital industry clusters.

Implementation Measures:

- Promote The Dalles as a hub for low-carbon, data-driven industry using local hydropower and broadband capacity.
- Work with Google and utility providers to identify co-location opportunities for energy-intensive or AI-enabled businesses.
- Support emerging sectors such as data analytics, cloud computing, and cleantech manufacturing.

Policy 5.2: Encourage environmentally responsible development and reuse of underutilized land.

Implementation Measures:

- Work with regional utilities and Google to explore opportunities for waste heat recovery, onsite energy storage, or circular resource systems as part of employment site redevelopment.
- Promote reuse of brownfield and grayfield sites for employment uses with public-private partnerships.
- Encourage dual-benefit projects (e.g., solar installation on industrial rooftops or parking structures).

Policy 5.3: Encourage innovation partnerships between private industry, utilities, and educational institutions.

Implementation Measures:

- Collaborate with Google, CGCC, and STEM organizations to support applied research and tech workforce pipelines.



- Support testbeds or pilot initiatives in sectors like ag-tech, cleantech, or environmental monitoring.
- Seek external funding for demonstration projects showcasing energy and resource-efficient technologies.

Goal 6: Strengthen Regional Economic Integration and Infrastructure

Policy 6.1: Coordinate economic development initiatives with regional partners.

Implementation Measures:

- Establish joint planning efforts with Wasco County, Klickitat County, the Port of the Dalles, and the Port of Klickitat for infrastructure and site readiness.
- Promote shared marketing of industrial and airport lands across jurisdictions.
- Engage in bi-state workforce and housing discussions to support common growth goals.
- Support regional childcare centers and solutions

Policy 6.2: Align infrastructure investment with regional economic priorities.

Implementation Measures:

- Identify regional infrastructure priorities (e.g., broadband, water/sewer, airport) and pursue shared funding strategies.
- Collaborate with ODOT and local transit providers to enhance access to employment centers.
- Support freight mobility and goods movement projects that strengthen The Dalles' role in regional logistics.

Policy 6.3: Position The Dalles as a regional logistics and advanced manufacturing hub.

Implementation Measures:

- Promote available industrial sites near I-84, rail corridors, and the airport for logistics and clean industry development.
- Engage with industrial brokers and developers to identify and recruit targeted businesses.
- Maintain The Dalles position as a primary agribusiness trade center by encouraging the growth of those businesses providing agricultural supplies and services, and those processing and marketing agricultural products
- Coordinate with utility and transportation agencies to ensure infrastructure capacity for industrial users.



Goal 7: Support the Cultural, Creative, and Experiential Economy

Policy 7.1: Promote growth of the artisan, cultural, and local experience-based economy.

Implementation Measures:

- Support adaptive reuse of downtown spaces for galleries, food/beverage makers, and creative industries.
- Partner with CGCC, makerspaces, and tourism entities to host public events and cultural festivals.
- Promote and market The Dalles as a destination for local goods, stories, and experiences.

Policy 7.2: Foster place-based economic development that reinforces local identity.

Implementation Measures:

- Encourage integration of local heritage, culture, and arts in economic revitalization strategies.
- Provide support for culturally relevant entrepreneurship and retail, especially in historic districts.
- Use signage, storytelling, and branding to tie the creative economy to The Dalles' sense of place.

Policy 7.3: Expand opportunities for live/work, maker, and micro-retail spaces in mixed-use areas.

Implementation Measures:

- Modify zoning to support small-scale production, artist studios, and flexible ground-floor commercial uses.
- Provide technical assistance or incentives for activating underutilized commercial properties.
- Partner with building owners and nonprofits to create shared retail and workspace incubators.

STRIKETHROUGH TEXT

~~Economic Development Goals~~

- ~~▪ Provide family wage employment opportunities for The Dalles citizens.~~
- ~~▪ Diversify the economic base of the community.~~
- ~~▪ Increase the tax base needed to provide an adequate level of community services for The Dalles citizens.~~
- ~~▪ Encourage the growth of existing employers and attract new employers to The Dalles that complement the existing business community.~~



- ~~Implement the objectives and activities of the Columbia Gateway/Downtown Urban Renewal Plan, enhancing opportunities for the improvement and redevelopment of business, civic, cultural, and residential uses in the area.~~
- ~~Utilize Port District lands for job creation, and development of the tax base in The Dalles.~~
- ~~Provide for tourism related employment as an important part of the effort to diversify The Dalles' economy.~~
- ~~Provide employment opportunities, environments, and choices which are a vital part of a high quality of life in The Dalles.~~
- ~~Support the maintenance and enhancement of The Dalles Commercial Historic District.~~
- ~~Encourage redevelopment and adaptive reuse of commercial space downtown as an alternative to commercial sprawl.~~
- ~~Support The Columbia Gorge Regional Airport located in Dallesport, Washington, in its growth and contribution to the local economy.~~

Goal 9 Policies

1. ~~Encourage the siting and growth of employers which pay family wages as identified in The Dalles Economic Opportunities Analysis (EOA).~~
2. ~~To the extent possible, designate within the existing UGB suitable land with site size and locational characteristics required by targeted employment as set forth in the 2010 Economic Opportunities Analysis (EOA).~~
3. ~~Identify industrial sites that are immediately available and serviceable for industrial development consistent with the Goal 9 rule. Request Oregon Economic and Community Development Department (OECDD) certification for "shovel ready" industrial sites pursuant to Executive Order 03-02.~~
4. ~~Coordinate with property owners to retain large commercial and industrial sites identified in the EOA for their intended commercial and industrial uses through zoning and master planning.~~
5. ~~Actively support redevelopment efforts for under utilized commercial and industrial sites within The Dalles UGB, recognizing that the Northwest Aluminum site provides the large industrial sites required by targeted employers during the 20-year planning period.~~
6. ~~Protect large Northwest Aluminum redevelopment sites for their intended industrial uses as identified in the EOA as set forth in Table 9-4.~~
7. ~~Commercial and service uses in the City's industrial zones should be limited to small scale retail and service uses that cater primarily to local area employees and customers.~~



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8. ~~Plan for and make prudent public investments to meet the future demands of industrial, commercial, and residential growth in The Dalles.~~
9. ~~Encourage investment in The Dalles Central Business District, and support project activities in the Columbia Gateway/Downtown Urban Renewal Plan.~~
10. ~~Encourage tourism related services as an element in the diversification of the community's economy.~~
11. ~~Encourage the development of the Mid-Columbia Medical Center and other health services as an important resource to the economic base of The Dalles, and as an important element in extending the perimeter of The Dalles' trade area.~~
12. ~~Maintain The Dalles position as a primary agribusiness trade center by encouraging the growth of those businesses providing agricultural supplies and services, and those processing and marketing agricultural products.~~
13. ~~Support the forest products industry as an element of the economy.~~
14. ~~Encourage the start-up and growth of small to medium sized businesses providing family wage jobs. Develop reasonable standards to allow home business start-ups.~~
15. ~~Encourage siting of new industries in The Dalles, and encourage existing industries to maintain high environmental standards.~~
16. ~~Reserve industrial zones for industrial uses and uses compatible with industry.~~
17. ~~Review and revise administrative policies and procedures to streamline the planning process, and reduce delays in obtaining development approvals.~~
18. ~~Coordinate economic planning and development with industrial development at Dallesport.~~
19. ~~Encourage educational, cultural, social and employment opportunities to enhance the quality of life in The Dalles for all age and income groups.~~
20. ~~Plan appealing streetscapes that encourage personal interaction, accommodate public gatherings, and enhance the experience of shoppers and workers.~~
21. ~~Encourage cooperation between public and private sectors to support economic growth.~~
22. ~~Make prudent investments in The Columbia Gorge Regional Airport as needed to accommodate airport development.~~

Implementation Measures

- ~~Central Business District/Downtown Area (Designated Central Business Commercial on the Land Use Plan Map):~~



- ~~Undertake activities which will create or strengthen linkages among the Downtown, the Columbia Riverfront, and the East and West Gateway areas.~~
- ~~Work with local business to redevelop the Sunshine Flour Mill property and East Gateway streetscape project.~~
- ~~Improve the visual appearance of streets in the Downtown Area by encouraging amenities such as street trees and street furniture when public and private development and redevelopment is undertaken.~~
- ~~Provide an adequate amount of properly located off street parking.~~
- ~~Conserve historically significant places and properties, and aid in the rehabilitation of buildings and properties, particularly in the Downtown Historic District.~~
- ~~Consider and minimize the aesthetic impact of utility locations when new development or redevelopment occurs.~~
- ~~Construct or improve water, sewer, and storm drain systems as needed.~~
- ~~West 6th Gateway Area (Designated General Commercial on the Land Use Plan Map):~~
 - ~~Provide for highway commercial developments in areas along the West Sixth corridor where this is the predominant land use.~~
 - ~~Improve the visual appearance by encouraging amenities such as street trees and street furniture when public and private development and redevelopment is undertaken.~~
 - ~~Construct or improve water, sewer and storm drain systems as needed.~~
 - ~~Ensure that future improvements and land use changes in the area provide adequate sound, light and visual buffers to adjacent residential areas.~~
 - ~~Reserve areas along East and West Second Street for commercial/industrial mixed zoning.~~
 - ~~Reserve land in the northern portion of the Northwest Aluminum site for needed commercial development.~~
- ~~The Dalles Industrial Area (Industrial areas shall be identified on the Land Use Plan Map for industrial uses):~~
 - ~~Provide for industrial development located with good access to I 84, arterial streets and rail facilities.~~
 - ~~Encourage master planned redevelopment of the Northwest Aluminum site that retains larger parcel sizes identified in the EOA for targeted industries.~~
 - ~~Locate industrial areas generally north of the I 84/Union Pacific Railroad corridor.~~
 - ~~Construct or improve water, sewer, streets, and storm drain systems as needed.~~
- ~~Service/Recreation Areas (Designated Recreational Commercial on the Land Use Plan Map):~~



- ~~Provide for mixed-use business and service commercial areas in locations with good access to I-84, Columbia River access, and proximity to recreation and/or visitor attractions.~~
- ~~Allowed uses include retail, service and office uses related to nearby industrial areas, and commercial uses serving the traveling public such as hotels, restaurants, conference centers and recreation facilities. Allow light industrial uses which are compatible with commercial and recreational uses.~~
- ~~Ensure site planning which protects and enhances the significant environmental areas located along the Columbia River and related streams and creeks.~~
- ~~Prepare zoning and development standards for the service/recreation areas.~~
- ~~Construct or improve water, sewer, street, and storm drain systems as needed.~~
- ~~Planned Developments (located in Commercial Areas)~~
 - ~~Planned development shall be located within areas designated Residential and Commercial on the Comprehensive Plan map. Such developments are intended to allow greater flexibility and creativity in construction, lay-out, and use.~~
 - ~~Planned developments for commercial uses shall be a minimum of 10 acres; development for residential uses shall be a minimum of one acre.~~