BAY AREA

COMPREHENSIVE ECONOMIC ANALYSIS

Prepared for:

City of Coos Bay
City of North Bend
Coos County
Oregon International Port of Coos Bay

April 30, 1998
Bay Area

Comprehensive Economic Analysis

April 30, 1998

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City of Coos Bay
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Oregon International Port of Coos Bay

Prepared by:

David Evans and Associates, Inc.
in conjunction with
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and Oregon Economic Development Department
TABLE OF CONTENTS

EXECUTIVE SUMMARY ................................................................. I

CHAPTER 1: INTRODUCTION ......................................................... 1-1
  BACKGROUND ................................................................. 1-1
  STUDY AREA ................................................................. 1-1

CHAPTER 2: ECONOMIC OPPORTUNITIES ANALYSIS .................. 2-1
  INTRODUCTION ................................................................. 2-1
  DATA SOURCES AND METHODOLOGY ................................ 2-1
    Housing Analysis ......................................................... 2-2
    Office-Commercial and Industrial Analysis ....................... 2-2
    Retail-Commercial Analysis ........................................... 2-2
    Land Inventories ......................................................... 2-3
  KEY STATE, NATIONAL, AND INTERNATIONAL FACTORS ........ 2-3
    Industrial Makeup of the Economies .................................. 2-3
  DEMOGRAPHIC OVERVIEW .................................................... 2-5
    Population Levels .......................................................... 2-5
    Household Size ............................................................. 2-7
    Population Age Composition ............................................. 2-8
    Employment ................................................................. 2-9
    Income ............................................................................ 2-10
  PROSPECTIVE INDUSTRIAL AND COMMERCIAL USES .......... 2-13
    Heavy Industry ............................................................. 2-14
    Tourist-Commercial/Retail .............................................. 2-14
    Multi-User Shipping Docks .............................................. 2-14
    Additional Medical Facilities .......................................... 2-14
    Prospective Uses Summary .............................................. 2-15
  MARKET ANALYSIS .............................................................. 2-15
    Housing Analysis .......................................................... 2-15
    Industrial and Office-Commercial Analysis ....................... 2-21
    Additional Industrial Growth Potential ................................ 2-36
    Space Implications of Additional Industrial Growth Potential ........................................................................ 2-40
    Retail-Commercial Analysis ............................................ 2-42
  CONCLUSIONS ................................................................. 2-47

CHAPTER 3: PLAN AND POLICY REVIEW .................................... 3-1
  INTRODUCTION ................................................................. 3-1

Bay Area Comprehensive Economic Analysis

April 30, 1998
**CHAPTER 4: REGIONAL LAND NEEDS PROJECTIONS**

Methodology .............................................................................................................. 4-1
Housing Land Needs .................................................................................................... 4-1
Baseline Industrial and Office-Commercial Land Needs ............................................ 4-1
Potential Industrial and Office-Commercial Land Needs ........................................... 4-3
Water-Dependent Land Needs .................................................................................... 4-5
Retail-Commercial Land Needs .................................................................................. 4-6
Conclusion .................................................................................................................. 4-7

*April 30, 1998*  
Bay Area Comprehensive Economic Analysis
CHAPTER 5: OVERALL OBJECTIVES FOR ECONOMIC DEVELOPMENT

REGIONAL COORDINATION ................................................................. 5-1
PLANS AND POLICIES ................................................................................................................................. 5-1
BUSINESS DEVELOPMENT ................................................................................................................................. 5-1
INFRASTRUCTURE AND TRANSPORTATION ..................................................................................................... 5-1
SHIPPING AND MARITIME DEVELOPMENT .................................................................................................. 5-2
TOURISM .................................................................................................................................................... 5-2
URBAN WATERFRONT AREAS ....................................................................................................................... 5-2

CHAPTER 6: ACTION PLAN ................................................................................................. 6-1
INTRODUCTION ................................................................................................................................. 6-1
GENERAL IMPLEMENTATION RECOMMENDATIONS ....................................................................................... 6-1
Regional Approach ........................................................................................................................................... 6-1
Plan and Policy Revisions ................................................................................................................................ 6-2
SPECIFIC IMPLEMENTATION RECOMMENDATIONS ...................................................................................... 6-3
Vision 2006: A Ten Year Economic Development Vision for Oregon’s Bay Area ........................................... 6-3
Coos County Comprehensive Plan, 1985, Volume I, Part I ........................................................................... 6-4
Coos County Comprehensive Plan, Volume II, Coos Bay Estuary Management Plan .................................. 6-5
Coos County Zoning and Land Development Ordinance .............................................................................. 6-6
City of North Bend 1995 Comprehensive Land Use Plan, Plan Provision and Policies .............................. 6-7
Zoning Ordinance of the City of North Bend .............................................................................................. 6-8
North Bend Urban Renewal Plan and Report .............................................................................................. 6-8
City of Coos Bay Comprehensive Plan 2000 ................................................................................................. 6-9
City of Coos Bay Land Development Ordinance 93 .................................................................................... 6-11
Coos Bay Urban Renewal Plan and Report, 1988; Plan Amendments, 1994 .................................................. 6-12
Coos Bay Empire District Urban Renewal Report .......................................................................................... 6-13
North Bay Urban Renewal Plan and Report ............................................................................................... 6-14
Bay Area Transportation Study, December 1995 ....................................................................................... 6-15
Other Documents ........................................................................................................................................... 6-16

APPENDIX A: REGIONAL SITE AVAILABILITY

APPENDIX B: EXAMPLE ORDINANCES

APPENDIX C: LIST OF ACRONYMS
LIST OF TABLES

TABLE 2-1 POPULATION LEVELS, 1980, 1990 AND 1996 ................................................................. 2-6
TABLE 2-2 TOTAL HOUSEHOLDS AND POPULATION ................................................................... 2-7
TABLE 2-3 PERSONS PER HOUSEHOLD ......................................................................................... 2-8
TABLE 2-4 POPULATION BY AGE .................................................................................................. 2-9
TABLE 2-5 HOUSING DEMAND ANALYSIS, 1995 TO 2020 COOS COUNTY, OREGON .................. 2-16
TABLE 2-6 INCREASE IN HOUSING UNITS REQUIRED, 1995 TO 2020 COOS COUNTY ............. 2-17
TABLE 2-7 BUILDING ACTIVITY IN RELATION TO HOUSING DEMAND ........................................... 2-17
TABLE 2-8 HOUSING DEMAND ANALYSIS CORE BAY AREA .......................................................... 2-18
TABLE 2-9 INCREASE IN HOUSING UNITS REQUIRED CORE BAY AREA, 1995 TO 2020 .......... 2-18
TABLE 2-10 HOUSING TYPES OCCUPIED BY NUMBER OF PERSONS PER HOUSEHOLD ............... 2-20
TABLE 2-11 TIMBER VOLUME REMOVED (THOUSANDS OF BOARD FEET) ................................. 2-26
TABLE 2-12 TIMBER HARVEST BY OWNERSHIP, 1995 ................................................................. 2-27
TABLE 2-13 PRODUCTS OUTBOUND FROM COOS BAY ............................................................... 2-29
TABLE 2-14 PRODUCTS INBOUND FROM COOS BAY .................................................................... 2-30
TABLE 2-15 BASELINE JOB GROWTH, 1996 TO 2006 COOS AND CURRY COUNTIES .................. 2-32
TABLE 2-16 BASELINE JOB GROWTH, 2006 TO 2020 COOS AND CURRY COUNTIES .................. 2-33
TABLE 2-17 OCCUPATION BY INDUSTRY, 1990 COOS AND CURRY COUNTIES ............................ 2-34
TABLE 2-18 BASELINE DEMAND FOR INDUSTRIAL SPACE, 1996 TO 2020 COOS AND CURRY COUNTIES 2-35
TABLE 2-19 BASELINE DEMAND FOR OFFICE SPACE, 1996 TO 2020 COOS AND CURRY COUNTIES 2-36
TABLE 2-20 IMPACTS OF A STEEL MILL IN COOS COUNTY ......................................................... 2-37
TABLE 2-21 CONSTRUCTION IMPACTS OF A NATURAL GAS FACILITY IN COOS COUNTY ............ 2-38
TABLE 2-22 DIRECT IMPACTS OF FIRST-YEAR SPENDING ON CONSTRUCTION OF DISTRIBUTION SYSTEM AND OPERATION AND MAINTENANCE (1997 DOLLARS) ................................................................. 2-38
TABLE 2-23 TOTAL LONG-TERM ECONOMIC IMPACTS OF NATURAL GAS PIPELINE (1997 DOLLARS) ................................................................. 2-39
TABLE 2-24 POTENTIAL JOB GROWTH, 1996 TO 2006 COOS AND CURRY COUNTIES .................. 2-40
TABLE 2-25 POTENTIAL JOB GROWTH, 2006 TO 2020 COOS AND CURRY COUNTIES .................. 2-41
TABLE 2-26 POTENTIAL DEMAND FOR INDUSTRIAL SPACE, 1996 TO 2020 COOS AND CURRY COUNTIES 2-41
TABLE 2-27 POTENTIAL DEMAND FOR OFFICE SPACE, 1996 TO 2020 COOS AND CURRY COUNTIES 2-42
TABLE 2-28 ESTIMATED POPULATIONS AND HOUSEHOLDS, RETAIL TRADE AREAS ....................... 2-45
TABLE 2-29 ANNUAL RETAIL SPENDING IN COOS COUNTY, 1996 .................................................. 2-45
TABLE 2-30 RETAIL MARKET ANALYSIS, 1996 TO 2020 COOS COUNTY ........................................ 2-45
TABLE 2-31 INCREASE IN DEMAND FOR RETAIL-COMMERCIAL SPACE, 1996 TO 2020 BAY AREA ..... 2-46

TABLE 3-1 SUMMARY OF CBEMP MANAGEMENT SEGMENTS AND POTENTIAL DEVELOPMENT ISSUES ................................................................................................................... 3-11
TABLE 3-2 2050 WATER DEMAND ESTIMATES ................................................................................ 3-20
TABLE 3-3 NORTH BEND COMPREHENSIVE PLAN DEVELOPMENT MANAGEMENT UNITS ................ 3-26
TABLE 3-4 NORTH BEND COMPREHENSIVE PLAN SHORELAND DESIGNATIONS ............................ 3-27
TABLE 3-5 BUDGET AMENDMENTS FOR THE COOS BAY URBAN RENEWAL PLAN ...................... 3-52
TABLE 3-6 NEW PROJECTS FOR THE COOS BAY URBAN RENEWAL PLAN ...................................... 3-53

TABLE 4-1 DEMAND FOR LAND DESIGNATED FOR HOUSING ...................................................... 4-1
TABLE 4-2 BASELINE DEMAND FOR LAND DESIGNATED FOR INDUSTRIAL USES ....................... 4-2
TABLE 4-3 BASELINE DEMAND FOR LAND DESIGNATED FOR OFFICE USES ............................... 4-3
TABLE 4-4 POTENTIAL DEMAND FOR LAND DESIGNATED FOR INDUSTRIAL USES .................... 4-4
TABLE 4-5 POTENTIAL DEMAND FOR LAND DESIGNATED FOR OFFICE USES ............................ 4-4
TABLE 4-6 DEMAND FOR LAND DESIGNATED FOR RETAIL USES ............................................... 4-6
TABLE 4-7 COMPARISON OF DEMAND TO SITES AVAILABLE FOR DEVELOPMENT IN THE SHORT-TERM .................................................................................................................. 4-7
TABLE 4-8 COMPARISON OF LONG-TERM DEMAND TO AVAILABLE COMMERCIAL AND INDUSTRIAL LAND ........................................................................................................... 4-8
LIST OF FIGURES

FIGURE 2-1 PROPORTION OF MANUFACTURING OUTPUT COMPARISON ............................................................ 2-4
FIGURE 2-2 PROPORTION OF MANUFACTURING EMPLOYMENT COMPARISON ................................................ 2-4
FIGURE 2-3 HISTORICAL POPULATION GROWTH ........................................................................................... 2-6
FIGURE 2-4 NUMBER OF PERSONS PER HOUSEHOLD .................................................................................. 2-7
FIGURE 2-5 POPULATION BY AGE ................................................................................................................ 2-8
FIGURE 2-6 DISTRIBUTION OF EMPLOYMENT BY INDUSTRY, COOS COUNTY ............................................ 2-9
FIGURE 2-7 EMPLOYMENT DISTRIBUTION BY INDUSTRY CODE DIVISION, 1996 ....................................... 2-10
FIGURE 2-8 AVERAGE ANNUAL PAYROLL, 1995 ............................................................................................ 2-11
FIGURE 2-9 PER CAPITA INCOME (CURRENT DOLLARS) COOS COUNTY VS. STATE OF OREGON ............... 2-12
FIGURE 2-10 COOS COUNTY PER CAPITA INCOME, CURRENT AND CONSTANT (1984) DOLLARS ............ 2-12
FIGURE 2-11 COMPONENTS OF PERSONAL INCOME .................................................................................... 2-13
FIGURE 2-12 POPULATION GROWTH TREND, COOS COUNTY, 1980 TO 2020 ........................................... 2-16
FIGURE 2-13 BUILDING PERMITS ISSUED, 1990 TO 1996 ................................................................. 2-19
FIGURE 2-14 HOUSEHOLD INCOME DISTRIBUTION COOS COUNTY, 1996 ............................................. 2-21
FIGURE 2-15 TRAVEL SPENDING BY TYPE OF BUSINESS COOS COUNTY, 1995 ......................................... 2-23
FIGURE 2-16 VISITOR SPENDING BY TYPE OF ACCOMMODATION COOS COUNTY, 1995 ...................... 2-24
FIGURE 2-17 EMPLOYMENT GENERATED BY TRAVEL SPENDING COOS COUNTY, 1995 ...................... 2-24
FIGURE 2-18 ESTIMATED COUNTY DISTRIBUTION OF TIMBER HARVEST ............................................. 2-26
FIGURE 2-19 DISTRIBUTION OF PRODUCTS OUTBOUND FROM COOS BAY, 1996 ............................... 2-28
EXECUTIVE SUMMARY

The Bay Area, comprising the communities of Coos Bay, North Bend, and Charleston, is the largest commercial, residential, professional, cultural, and industrial center on the Oregon Coast. The region has experienced a shifting economy over the last 15 years with large mill closures and a decrease in the amount of timber harvested. As a result, the reliance on the timber industry as a major employer has diminished as the economy struggles to find stability in a new industry mix. The analysis summarized in this report suggests the Bay Area will experience increases in population and employment, with a resulting need for new development of all kinds: housing, office-commercial space, industrial space, and retail-commercial space.

Available industrial and commercial lands are the basis of economic growth and development within any community. It is important that the Bay Area provide land that is appropriate to meet a range of commercial and industrial opportunities. Too little land or land designated inappropriately will stifle economic growth. This analysis, including the comprehensive land use planning determination of future land needs to meet projected economic development opportunities, will be part of the local periodic review process.

The information available suggests the Bay Area will experience increases in population and employment, with a resulting need for new housing, industrial, office-commercial, and retail-commercial development. The Regional Site Availability Technical Memorandum summarizes the inventory of available commercial and industrial land in the Bay Area. The land requirements are compared to the short-term supply of serviceable sites in Table I-1.

TABLE I-1
COMPARISON OF DEMAND TO SITES AVAILABLE FOR DEVELOPMENT IN THE SHORT-TERM 1996-2006

<table>
<thead>
<tr>
<th>Designated Use</th>
<th>Estimated Available (acres)</th>
<th>Baseline Scenario</th>
<th>Potential Scenario</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Projected Need</td>
<td>Difference</td>
</tr>
<tr>
<td>Commercial* (Office and Retail)</td>
<td>58</td>
<td>61</td>
<td>(3)</td>
</tr>
<tr>
<td>Industrial</td>
<td>35</td>
<td>24</td>
<td>(11)</td>
</tr>
</tbody>
</table>

*Commercial Lands include lands designated "Industrial-Commercial" in the City of Coos Bay.

Sites are considered to be unavailable for development in the short term if they are not serviceable, if there is inadequate site access, or if they have environmental constraints.

Source: Regional Site Availability (Estimated Available Acreage).

Two scenarios were analyzed, a baseline scenario and potential scenario. The baseline scenario is estimated using the employment forecasts developed by the State of Oregon Employment Department and Office of Economic Analysis. The potential scenario includes the addition of a potential steel mill and natural gas pipeline. As shown in Table I-1, the Bay Area will require additional lands designated for commercial uses in both scenarios in order to meet its land needs requirements in the short term.
In the long term, the evaluation is based on total acreage available. The land requirements are compared to the total availability of land designated for commercial and industrial uses in Table I-2.

### TABLE I-2
Comparision of Long-Term Demand to Available Commercial and Industrial Land 1996-2020

<table>
<thead>
<tr>
<th>Designated Use</th>
<th>Baseline Scenario</th>
<th>Potential Scenario</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Estimated Available (acres)</td>
<td>Projected Need (acres)</td>
</tr>
<tr>
<td>Commercial* (Office and Retail)</td>
<td>59</td>
<td>124</td>
</tr>
<tr>
<td>Industrial</td>
<td>218</td>
<td>25</td>
</tr>
</tbody>
</table>

*Commercial Lands include lands designated "Industrial-Commercial" in the City of Coos Bay.

Source: Regional Site Availability (Estimated Available acreage).

Both the baseline and potential growth scenarios show a deficit of available land designated for commercial uses. Although there appears to be adequate amounts of land designated for industrial uses, several of the available sites have significant development constraints, such as environmental constraints (e.g., areas within the floodplain, wetlands) and/or lack of public facilities.

Due to development of larger containerships and a corresponding need for ever deeper channels and excellent intermodal connections, the Port of Coos Bay will likely serve as a feeder port, receiving cargo by smaller ships from hub ports (those with channel depths in excess of 50 feet and immediate access to surface transportation). Growth of local shipping and other water-dependent land uses will be limited, with most of the inbound shipments serving the consumption needs of the immediate Bay Area and most outbound shipments limited to locally-generated wood products. The need for land designated for water-dependent land uses is expected to remain relatively constant with current needs.

With the Bay Area's economy shifting in recent years from one based heavily on natural resources (particularly wood products and fishing) to one that is more diversified, and Bay Area jurisdictions are working to further economic diversification. The Steering Committee for this Comprehensive Economic Analysis, composed of representatives from Coos County, the cities of Coos Bay and North Bend, the Oregon International Port of Coos Bay, the Department of Land Conservation and Development, and the Oregon Economic Development Department, has identified objectives for future economic development in the Bay Area.

The objectives form the basis of a development strategy for the region, which, in turn, guides the recommendations in this action plan. The objectives are grouped in general categories. In summary, the objectives are:

- To coordinate, as a region, on issues related to economic development (including land use planning);
- To promote development of the region's traditional, natural-resource-based industries as well as tourism, medical facilities, and new industries and commercial businesses;
• To ensure the region is served by public services and transportation that will meet the needs of existing and potential businesses;
• To promote the region's shipping and maritime resources;
• To encourage tourism; and
• To enhance the waterfront areas of downtown North Bend and Coos Bay.

Taken together, the objectives are aimed at encouraging and diversifying the Bay Area's economy and quality of life.

As part of this analysis, the consultant team reviewed state and local plans and policies related to land use and development in the Bay Area. Conflicts between the existing plans and policies and the local jurisdictions' objectives for future economic development were identified. In addition, interviews with several Steering Committee members, local officials, and property owners were conducted to help identify potential conflicts between existing policies and economic objectives.

Plans and documents reviewed as part of this analysis include:

- Vision 2006: A Ten Year Economic Development Vision for Oregon's Bay Area
- Coos County Comprehensive Plan
- Coos Bay Estuary Management Plan
- Coos County Zoning and Land Development Ordinance
- Coos Bay-North Bend Water Board Revised Water Demand Forecast
- City of North Bend 1995 Comprehensive Land Use Plan
- Zoning Ordinance of the City of North Bend
- North Bend Subdivision Ordinance
- North Bend Urban Renewal Plan and Report
- City of Coos Bay Comprehensive Plan
- City of Coos Bay Land Development Ordinance 93
- City of Coos Bay Goals
- City of Coos Bay Urban Renewal Plan and Report, and Amendments
- City of Coos Bay Empire District Urban Renewal Report
- North Bay Urban Renewal Plan and Report
- Oregon International Port of Coos Bay Strategic Business Plan
- Bay Area Transportation Study
- North Bend Municipal Airport Master Plan
- Statewide Planning Goals 8, 9, 11, 12, 14, 16, 17, and 18

The results of the plan and policy review were used, in combination with the results of the analysis of regional land needs and input from the Steering Committee, to make recommendations to implement Bay Area jurisdictions' economic development objectives. In general, the recommendations suggest continued regional coordination and revisions to local jurisdictions' plan and policy documents.
Regional Approach

Coordination between the cities of North Bend and Coos Bay is necessary for a number of reasons, e.g., ensuring connected transportation facilities and efficient provision of urban services. Coordination among the cities, Coos County, and the Oregon International Port of Coos Bay is also important for economic development, e.g., because the County has the largest industrial land base in the region and because the Port plays a lead role in attracting new industries to the Bay Area.

Regional coordination will also play an important role for the jurisdictions to comply with Statewide Land Use goals and regulations. Under Goal 9 (Economic Development) and Goal 14 (Urbanization) and their implementing rules, jurisdictions must provide adequate opportunities for a variety of economic activities and an adequate supply of land for each category of land use. A regional planning approach will allow Bay Area jurisdictions to meet these requirements as a whole, rather than individually.

Representatives from Coos County, the City of North Bend, the City of Coos Bay, and the Oregon International Port of Coos Bay should continue to meet on a regular basis (e.g., once a month) to assess implementation of the Action Plan and economic development strategies, to share information about potential and proposed development, and to coordinate activities related to economic development of the Bay Area (e.g., permitting, provision of infrastructure, etc.). As part of this coordination, Coos County and the cities of Coos Bay and North Bend should craft, commit to, and sign a Memorandum of Agreement (MOA) which defines the roles and responsibilities of each jurisdiction and the Port, for implementing local economic development strategies. The MOA may contain each jurisdiction’s objectives as well as the objectives of the region as a whole. It may also contain each jurisdiction’s responsibilities for provision and maintenance of infrastructure, provision of adequate land supplies for each general type of land use (as required by Goals 9 and 14), etc. At a minimum, the MOA should encourage continued regional coordination on land use issues.

Such coordination will ensure that appropriate amendments are made to comprehensive plans and zoning ordinances while protecting the necessary land base. New development resulting from growth and change in the community will require appropriately designated lands and development standards.

Plan and Policy Revisions

Many of the plans and policies affecting or related to economic development and land use in the Bay Area were reviewed and analyzed for their potential to hinder economic development in the region. The analysis findings are presented in the Plan and Policy Review (Chapter 3). In general, it was found that the comprehensive plans and implementing ordinances of local jurisdictions should be revised to reflect the local jurisdictions' desire to enhance and diversify the regional economy. Toward this end, the cities of Coos Bay and North Bend, and Coos County, should evaluate current plans and policies and revise them, as appropriate, to encourage economic development and diversification in the region. Regional coordination should be included in the evaluation process, as provided for in the MOA.

The cities of Coos Bay and North Bend should encourage development of a mix of uses along their waterfronts and, as appropriate, in other areas of the cities. Mixed-use areas can encourage pedestrian

April 30, 1998

Bay Area Comprehensive Economic Analysis
activity, making an area attractive to visitors as well as reducing automobile use (as required by the Oregon Transportation Planning Rule).

Coos County and the cities of North Bend and Coos Bay should utilize the current periodic review cycle to thoroughly evaluate and revise their existing plans and policies. Through periodic review, jurisdictions can redesignate land and revise policies and ordinances through a legislative, rather than quasi-judicial process. Such redesignation may include the adoption of a floating zone to encourage commercial and/or industrial uses while preserving a prescribed amount or percentage of land for water-dependent or water-related uses. The floating zone may be particularly suited to the downtown waterfront areas of North Bend and Coos Bay.

Local jurisdictions should evaluate the infrastructure needs of sites designated for water-dependent or water-related (including ESWD) uses. As identified in the Regional Land Needs technical memorandum, the Bay Area has an over-supply of land designated for water-dependent or water-related uses. However, the Coos Bay Channel is a special resource for the region, which gives the Bay Area an advantage over other coastal communities. Local jurisdictions should preserve that advantage, which they can achieve, in part, by maintaining an adequate supply of land designated for water-dependent or water-related uses. In addition, sites designated for water-dependent or -related uses must have the infrastructure needed for such uses. Therefore, local jurisdictions should develop an understanding of those infrastructure needs and designate sites that have the necessary infrastructure in place or can be reasonably served.

Information provided in this economic analysis provides a basis for updating existing jurisdictions' inventories and for making decisions about future land needs. Each local jurisdiction should share information with the other jurisdictions about land uses as they work together to maintain and update a regional inventory of vacant or available land. The regional inventory would be a useful planning tool, particularly to ensure an adequate supply of land for various land uses in the region as a whole. Procedures for maintaining the regional inventory may be included in the MOA.
CHAPTER 1: INTRODUCTION

BACKGROUND
The Bay Area Comprehensive Economic Analysis was funded through grants from the Oregon Economic Development Department (OEDD) and the Department of Land Conservation and Development (DLCD). In accordance with grant requirements, this analysis includes the following major components: an economic opportunities analysis, project siting requirements (e.g., industrial and commercial land needs), regional site availability, a review of existing plans and policies, economic strategies, and an action plan containing measures to implement the economic strategies.

To oversee the economic analysis and provide local expertise, a Steering Committee was formed. The Steering Committee included representatives from Coos County, the City of North Bend, the City of Coos Bay, the Oregon International Port of Coos Bay, DLCD, and OEDD (Ports Division). The Steering Committee met with the project consultants, David Evans and Associates, Inc. and Shoji Planning and Development, throughout the year in which this analysis was prepared. They provided valuable information for inclusion in the analysis, as well as review of work products.

STUDY AREA
The study area for the Comprehensive Economic Analysis of the Bay Area encompasses the cities of North Bend and Coos Bay, as well as Charleston and other unincorporated areas in the region. The study area extends west approximately to the Bastendorff Beach County Park, south to the South Slough Reserve, east to the Coos River Highway bridge (at Myrtlewood Lane), and north to Marine Way. In general, this document refers to the study area as the “Bay Area.”

For the inventory of industrial and commercial sites in the region (see Appendix A), one additional area, outside the Bay Area boundaries, was included at the request of the Steering Committee: an industrial area located north of the Bay Area along Highway 101, locally known as the “Riley/McKeown” properties.
CHAPTER 2: ECONOMIC OPPORTUNITIES ANALYSIS

INTRODUCTION

The Bay Area, including the communities of Coos Bay, North Bend, and Charleston, is the largest commercial, residential, professional, cultural, and industrial center on the Oregon Coast. The region has experienced a shifting economy over the last 15 years. With large mill closures and a decrease in the amount of timber harvested, the reliance on the timber industry as a major employer has diminished and the economy is struggling to find stability in a new industry mix. The analysis summarized in this report suggests the Bay Area will experience increases in population and employment, with a resulting need for new development of all kinds: housing, office-commercial space, industrial space, and retail-commercial space.

Available industrial and commercial lands are the basis of economic growth and development within any community. It is important that the Bay Area provide land that is appropriate to meet a range of commercial and industrial opportunities. Too little land or land designated inappropriately will stifle economic growth. This analysis, including the comprehensive land use planning determination of future land needs to meet projected economic development opportunities, will be part of the local periodic review process.

DATA SOURCES AND METHODOLOGY

The analysis described in this memorandum is based on a variety of data sources. Official U.S. Census data is used for historic comparison and analysis. Portland State University’s Center for Population Research and Census (PSU CPRC) develops annual population estimates for Oregon and its cities and counties for the purpose of allocating certain state tax revenues. PSU CPRC’s numbers, the official state population estimates, serve as the basis for the existing conditions in the Bay Area. At the request of the Governor’s community solutions team, the State of Oregon Office of Economic Analysis (OEA) coordinated with many state, regional, and local agencies and organizations to prepare long-term (through year 2040) state population and employment forecasts, disaggregated by county. The county-level employment forecasts are based on covered employment payrolls as reported by the Oregon Employment Department.

OEA used business-cycle trends (as reflected by the Employment Department’s employment forecasts) as the primary driver of population and employment for the short term. For the long term, the forecasts shift to a population-driven model, which emphasizes demographics of the resident population, including age and gender of the population, with assumptions regarding life expectancy, fertility rate, and immigration. By calculating a weighted average growth rate for each county (weighting recent growth more heavily than past growth) and combining this average growth rate with the projected county-wide growth rate, the OEA methodology assumes convergence of growth rates because of the physical constraints of any area to sustain growth rates beyond the state or county average for long periods of time. These constraints include availability of land and housing, congestion, and other infrastructure limitations.
Housing Analysis
Housing demand is generated by an increase in households. Such increases are usually generated by population growth, but can also occur as the result of changes in household composition. For example, the same number of people can have a higher demand for housing units if the average household size gets smaller. Using OEA’s population projections and trends in household composition, David Evans and Associates, Inc. (DEA) calculated a projected increase in number of households.

Office-Commercial and Industrial Analysis
Demand for industrial and office-commercial lands is driven by employment growth in industries using industrial and office space. The Oregon Employment Department reports employment by industry and occupation. Ten-year projections are provided by industry. OEA provides long-term, demographic-driven employment forecasts based on the Bureau of Labor Statistics’ labor participation rates. The types of space used by industry varies by the occupations they employ, as well as regional land development patterns. By applying industry code divisions’ trends toward the occupations they employ, and, in turn, the types of space they use, DEA translated the employment projections to demands for office-commercial and industrial space.

Water-Dependent Industrial Use
The designation of the Port of Coos Bay as a deep draft port places further demands on the lands adjacent to the channel. The origins of exported wood products come from as far north as Portland, and as far south as Scotia, California. These products are exported throughout the Pacific Rim, including destinations in Australia, China, Japan, Korea, various parts of the Mediterranean, New Zealand, the Philippines, South America, and the South Sea Islands.

According to the U.S. Army Corps of Engineers, the primary impact area for this facility includes Coos, Curry, Josephine, and Douglas Counties. Data from the Oregon International Port of Coos Bay show the primary area to include Lane and Jackson Counties, as well as surrounding areas. Because the primary exported products are wood chips, logs, and related forestry products, information on wood production from the Oregon Department of Forestry supplements Port data. Because uses permitted on lands designated Water-Dependent (WD) or Water-Related (WR) are limited generally to the manufacturing and wholesale trade sectors, changes in demand for industrial land to support these sectors will affect the need for land designated WD or WR.

Retail-Commercial Analysis
Demand for retail-commercial space is driven primarily by patterns in consumer spending. Spending outside a traditional market area (commonly referred to as “leakage”) reduces the demand for retail-commercial space. However, a healthy economy with adequate selection can satisfy consumers within a traditional trade area and minimize retail leakage. Estimates of consumer spending for various retail spending categories were developed by Claritas, Inc. based on the “interview” portion of the consumer expenditure survey conducted by the Bureau of Labor Statistics and the U.S. Census Bureau as part of the 1990 Census. The Oregon Tourism Commission and Dean Runyan and Associates estimated spending by visitors to Coos County. Adding spending attributable to the visitor industry, DEA translated these consumer spending data to supportable commercial space using retail sales data provided by the Urban Land Institute.
Land Inventories

Inventories of land zoned for industrial, commercial, and residential uses, as well as existing commercial and industrial space and residential units, are described in a separate technical memorandum, Regional Site Availability, also prepared by DEA.

**KEY STATE, NATIONAL, AND INTERNATIONAL FACTORS**

The 20-year context of this analysis suggests that major changes in the national and global economies will have an important bearing on the economic and demographic prospects in the Bay Area. The Oregon Office of Economic Analysis used the Data Resources Incorporated-McGraw-Hill (DRI) twenty-five year simulation of the national economy as the focus for the national outlook. Key assumptions include the following:

- The national economy will transition to the “natural” rate of unemployment of 5.8 percent;
- The economy will have no major disturbances (no oil price shocks or no major changes in macroeconomic policy);
- The fertility rate (average number of childbirths per woman) is expected to remain near the current level of 2.1;
- Life expectancy is expected to lengthen from its current average of 75.8 years to 82.1 years by year 2050; and
- Net immigration is expected to average 880,000 annually.

The net effect of these and other key demographic factors is expected to yield a total US population growth averaging 0.8 percent growth per year through 2020, slightly lower than the 1 percent average of the past 25 years. One recent trend that is evident in both regional and national growth is that employment growth has outpaced population growth. This effect is caused primarily from increases in the labor participation rates.

The Office of Economic Analysis’ study suggests that Oregon’s population will continue to grow at a faster rate than the nation as a whole. Because it is unlikely that the state can sustain growth rates higher than the nation over a long period of time, the difference between the national and state growth rates is projected to decline over time.

**Industrial Makeup of the Economies**

One factor that must be analyzed in evaluating the relationship between the national, state, and local economies is the industry mix of those economies. Often a significant factor is the proportion of the economy attributable to manufacturing. In an economy with a strong manufacturing sector, employment may grow slower than one with stronger non-manufacturing components, simply because productivity gains in manufacturing typically outpace those in the non-manufacturing sector. In order to evaluate the extent of this effect, the Office of Economic Analysis compared the manufacturing proportion of output and employment of Oregon against the U.S. The results of this analysis are shown in Figure 2-1 and Figure 2-2.
Although there have been some historical differences in the proportion of the Oregon and U.S. economies attributable to manufacturing, these differences have been converging over time. As shown in the output comparison, the manufacturing sector accounted for a over one-quarter of the Gross State Product in 1977, somewhat greater than the national proportion of 23.9 percent. Since that time, both the state and national economies have diversified with manufacturing providing 17.8 percent of the Gross State Product and 17.7 percent of the Gross Domestic Product in 1992. In terms of employment, fully 22 percent of the state’s non-agricultural jobs were in manufacturing, slightly less than the U.S.
The proportion of manufacturing jobs of 23.9 percent. As is reflected in the output data, however, both the state and national economies have diversified, with manufacturing providing 18.5 percent of all non-agricultural jobs in Oregon and 18.4 percent of all non-agricultural jobs in the U.S. in 1992. In these terms, the Oregon economy more closely reflects the national economy than ever before.

The recent turmoil in the Asia markets will have implications not only for the nation, but also for the State of Oregon and the Bay Area. On one hand, the currency devaluation has softened export demand for everything from Nike shoes to lumber and other building materials. On the other hand, the chaos in the financial markets has pushed down interest rates, with investors seeking the safety of U.S. securities. With the net effect of the Asian financial crisis yet to be determined, there is bound to be some impact to the State and regional economies.

**DEMOGRAPHIC OVERVIEW**

The following demographic background serves as the basis for market analyses relating to housing, office-commercial and industrial, and retail-commercial space.

**Population Levels**

The populations of the Bay Area and Coos County have been relatively stable since the 1980 census. Overall, there was a slight decline in population levels in the late 1980s, reflecting the slowdown in the economy of the state as a whole. Since the late 1980s, the population level has returned roughly to its 1980 levels. The county population dropped from 64,047 in 1980 to an estimated low of 57,500 in 1986 and 1987, rising to 62,800 in 1994, and falling again to an estimated 61,700 as of July 1, 1996. Using the Cities of Coos Bay and North Bend to represent the population of the core Bay Area, Figure 2-3 shows population levels of the core Bay Area, Coos County, and the State of Oregon. The population of the core Bay Area has increased slightly as a proportion of the county population as a whole, from 40.3 percent in 1980 to 41.2 percent in 1996.

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1 These figures include the population of Eastside, which was consolidated with the City of Coos Bay in 1983.
Cities in Coos County experienced growth patterns similar to that of the county as a whole. Table 2-1 shows the historical population patterns of Coos Bay, North Bend, Bandon, Coquille, Lakeside, Myrtle Point, and Powers compared to the population levels of Coos County and the State of Oregon.

### Table 2-1


<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Coos Bay*</td>
<td>16,025</td>
<td>15,076</td>
<td>-5.92%</td>
<td>15,520</td>
<td>2.95%</td>
</tr>
<tr>
<td>North Bend</td>
<td>9,779</td>
<td>9,614</td>
<td>-1.69%</td>
<td>9,885</td>
<td>2.82%</td>
</tr>
<tr>
<td>Bandon</td>
<td>2,331</td>
<td>2,224</td>
<td>-4.59%</td>
<td>2,760</td>
<td>24.10%</td>
</tr>
<tr>
<td>Coquille</td>
<td>4,481</td>
<td>4,121</td>
<td>-8.03%</td>
<td>4,225</td>
<td>2.52%</td>
</tr>
<tr>
<td>Lakeside</td>
<td>1,453</td>
<td>1,437</td>
<td>-1.10%</td>
<td>1,630</td>
<td>13.43%</td>
</tr>
<tr>
<td>Myrtle Point</td>
<td>2,859</td>
<td>2,712</td>
<td>-5.14%</td>
<td>2,730</td>
<td>0.66%</td>
</tr>
<tr>
<td>Powers</td>
<td>819</td>
<td>682</td>
<td>-16.73%</td>
<td>695</td>
<td>1.91%</td>
</tr>
<tr>
<td>Coos County</td>
<td>64,047</td>
<td>60,273</td>
<td>-5.89%</td>
<td>61,700</td>
<td>2.37%</td>
</tr>
<tr>
<td>Oregon</td>
<td>2,633,156</td>
<td>2,842,321</td>
<td>7.94%</td>
<td>3,181,000</td>
<td>11.92%</td>
</tr>
</tbody>
</table>

*Includes Eastside, which was consolidated with Coos Bay in 1983.

Source: Portland State University Center for Population Research and Census.

As shown in Table 2-1, net population losses occurred in every incorporated municipality in Coos County between 1980 and 1990. Since the 1990 census, PSU CPRC estimates that each jurisdiction has
regained population. The small coastal communities of Bandon and Lakeside have experienced the most
dramatic growth (average annual rates of 3.7 percent [Bandon] and 2.1 percent [Lakeside]) since 1990.

Household Size
Even with little change in the net population level for the Bay Area, there have been some significant
changes in household composition. One shift that has occurred is in the number of persons per
household. For example, the number of one- and two-person households made up 64 percent of all
households in 1990 as compared to 57 percent in 1980. The difference in the number of persons per
household in 1980 and 1990 in Coos County is shown in Figure 2-4.

FIGURE 2-4
NUMBER OF PERSONS PER HOUSEHOLD
COOS COUNTY

<table>
<thead>
<tr>
<th>1980</th>
<th>6 or more persons</th>
<th>5 persons</th>
<th>1 person</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>7%</td>
<td>4%</td>
<td>21%</td>
</tr>
<tr>
<td>4 persons</td>
<td>16%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3 persons</td>
<td>17%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2 persons</td>
<td>35%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1990</td>
<td>6 or more persons</td>
<td>5 persons</td>
<td>1 person</td>
</tr>
<tr>
<td></td>
<td>6%</td>
<td>3%</td>
<td>24%</td>
</tr>
<tr>
<td>4 persons</td>
<td>13%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3 persons</td>
<td>15%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2 persons</td>
<td>39%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: U.S. Bureau of the Census.

The change in household size has been dramatic enough to increase the total number of households from
23,790 in 1980 to 24,193 in 1990, despite a net population loss of 3,800 persons during the same time
period. Correspondingly, the average number of persons per household has declined from 2.69 persons
per household in 1980 to 2.49 persons per household in 1990, as shown in Table 2-2.

TABLE 2-2
TOTAL HOUSEHOLDS AND POPULATION
COOS COUNTY, 1980 AND 1990

<table>
<thead>
<tr>
<th></th>
<th>1980</th>
<th>1990</th>
</tr>
</thead>
<tbody>
<tr>
<td>Households</td>
<td>23,790</td>
<td>24,193</td>
</tr>
<tr>
<td>Population</td>
<td>64,047</td>
<td>60,273</td>
</tr>
<tr>
<td>Average Number of Persons per Household</td>
<td>2.69</td>
<td>2.49</td>
</tr>
</tbody>
</table>

Source: U.S. Bureau of the Census.

Each jurisdiction in Coos County has its own unique household composition. As shown in Table 2-3,
some communities are comprised primarily of one- and two-person households (76 percent of all
households in the City of Bandon, for example), while other communities have a greater proportion of
larger households (such as the 39 percent of households with three persons or more in the City of North
Bend).
TABLE 2-3
PERSONS PER HOUSEHOLD
1990 CENSUS

<table>
<thead>
<tr>
<th></th>
<th>City of Bandon</th>
<th>City of Coos Bay</th>
<th>City of Coquille</th>
<th>City of Lakeside</th>
<th>City of Myrtle Point</th>
<th>City of North Bend</th>
<th>City of Powers</th>
<th>Coos County</th>
<th>Oregon</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 person</td>
<td>34.7%</td>
<td>28.5%</td>
<td>26.4%</td>
<td>22.9%</td>
<td>27.0%</td>
<td>23.4%</td>
<td>37.0%</td>
<td>24.3%</td>
<td>25.1%</td>
</tr>
<tr>
<td>2 persons</td>
<td>41.2%</td>
<td>37.4%</td>
<td>37.8%</td>
<td>44.1%</td>
<td>34.8%</td>
<td>37.2%</td>
<td>36.1%</td>
<td>39.2%</td>
<td>35.6%</td>
</tr>
<tr>
<td>3 persons</td>
<td>11.1%</td>
<td>15.1%</td>
<td>14.4%</td>
<td>14.9%</td>
<td>14.1%</td>
<td>16.7%</td>
<td>9.1%</td>
<td>15.0%</td>
<td>15.7%</td>
</tr>
<tr>
<td>4 persons</td>
<td>8.1%</td>
<td>11.7%</td>
<td>14.4%</td>
<td>10.2%</td>
<td>12.7%</td>
<td>14.7%</td>
<td>8.8%</td>
<td>13.0%</td>
<td>14.1%</td>
</tr>
<tr>
<td>5 persons</td>
<td>4.2%</td>
<td>5.6%</td>
<td>4.8%</td>
<td>3.3%</td>
<td>10.9%</td>
<td>5.1%</td>
<td>6.0%</td>
<td>5.8%</td>
<td>6.2%</td>
</tr>
<tr>
<td>6 or more</td>
<td>0.7%</td>
<td>1.8%</td>
<td>2.3%</td>
<td>4.6%</td>
<td>0.6%</td>
<td>2.9%</td>
<td>3.1%</td>
<td>2.6%</td>
<td>3.2%</td>
</tr>
</tbody>
</table>

Source: U.S. Bureau of the Census.

Population Age Composition
The shift to smaller household size can be explained, in part, by a shift in the age composition of the population. Between 1980 and 1996, all categories under age 39 have experienced net losses as a proportion of the total population, as shown in Figure 2-5. Corresponding population gains have occurred in the 40-49, 70-79, and over 80 categories. The population gains include increases in “empty-nester” households, couples without children, and older people living alone.

FIGURE 2-5
POPULATION BY AGE
COOS COUNTY

[Graph showing population by age from 1980 to 1996]


The existing age composition of the population in Coos County differs from the surrounding areas and the state as a whole. As Table 2-4 shows, Coos County has a larger percentage of older residents than do neighboring Curry County or the state as a whole.
TABLE 2-4
POPULATION BY AGE
1996

<table>
<thead>
<tr>
<th></th>
<th>Coos County</th>
<th></th>
<th>Curry County</th>
<th></th>
<th>State of Oregon</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Number</td>
<td>Percent of</td>
<td>Number</td>
<td>Percent of</td>
<td>Number</td>
</tr>
<tr>
<td>Under 10</td>
<td>7,391</td>
<td>12.0%</td>
<td>2,343</td>
<td>14.7%</td>
<td>461,056</td>
</tr>
<tr>
<td>10-19</td>
<td>8,917</td>
<td>14.5%</td>
<td>2,327</td>
<td>14.6%</td>
<td>444,139</td>
</tr>
<tr>
<td>20-29</td>
<td>7,059</td>
<td>11.4%</td>
<td>2,002</td>
<td>12.6%</td>
<td>414,978</td>
</tr>
<tr>
<td>30-39</td>
<td>7,987</td>
<td>12.9%</td>
<td>2,158</td>
<td>13.6%</td>
<td>484,794</td>
</tr>
<tr>
<td>40-49</td>
<td>9,216</td>
<td>14.9%</td>
<td>2,328</td>
<td>14.6%</td>
<td>514,972</td>
</tr>
<tr>
<td>50-59</td>
<td>6,607</td>
<td>10.7%</td>
<td>1,523</td>
<td>9.6%</td>
<td>312,893</td>
</tr>
<tr>
<td>60-69</td>
<td>6,174</td>
<td>10.0%</td>
<td>1,423</td>
<td>8.9%</td>
<td>234,455</td>
</tr>
<tr>
<td>70-79</td>
<td>5,502</td>
<td>8.9%</td>
<td>1,182</td>
<td>7.4%</td>
<td>201,497</td>
</tr>
<tr>
<td>80 and over</td>
<td>2,847</td>
<td>4.6%</td>
<td>614</td>
<td>3.9%</td>
<td>112,216</td>
</tr>
</tbody>
</table>

Source: Portland State University Center for Population Research and Census.

Employment

As noted earlier, the economy of the Bay Area has changed significantly in the last several decades. Gains in employment in retail trade, services, and government sectors have been offset by significant losses in manufacturing employment. Figure 2-6 shows the distribution of employment by industry of Coos County in 1980 compared to 1996. During this time period, total employment grew only slightly, from 25,350 jobs in 1980 to 25,740 in 1996.

FIGURE 2-6
DISTRIBUTION OF EMPLOYMENT BY INDUSTRY, COOS COUNTY

TFU: Transportation, Communications, and Public Utilities.
FIRE: Finance, Insurance, and Real Estate.

Source: State of Oregon Employment Division.

Bay Area Comprehensive Economic Analysis

April 30, 1998
Figure 2-7 shows these shifts in employment have created a regional economy more reliant on the government, retail trade, and transportation, communications, and public utilities (TPU) sectors than the state as a whole.

**FIGURE 2-7**

EMPLOYMENT DISTRIBUTION BY INDUSTRY CODE DIVISION, 1996

<table>
<thead>
<tr>
<th>Industry Code Division</th>
<th>Coos County</th>
<th>Oregon</th>
</tr>
</thead>
<tbody>
<tr>
<td>Government</td>
<td>20%</td>
<td>15%</td>
</tr>
<tr>
<td>Services</td>
<td>25%</td>
<td>20%</td>
</tr>
<tr>
<td>FIRE</td>
<td>30%</td>
<td>25%</td>
</tr>
<tr>
<td>Retail Trade</td>
<td>15%</td>
<td>10%</td>
</tr>
<tr>
<td>Wholesale Trade</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>TPU</td>
<td>10%</td>
<td>5%</td>
</tr>
<tr>
<td>Construction &amp; Mining</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>0%</td>
<td>0%</td>
</tr>
</tbody>
</table>

TPU: Transportation, Communications, and Public Utilities.
FIRE: Finance, Insurance, and Real Estate.

*Source: State of Oregon Employment Division.*

**Income**

One impact that the shift away from manufacturing has had on the economy is a loss of manufacturing jobs which traditionally have been higher paying than those in the retail trade and service sectors. One indicator of the type of wages an industry provides is average annual payroll (total payroll for each industry group divided by total number of employees in that industry group). As noted earlier, employment growth in Coos County has occurred in the retail trade and service industries, with small gains in the wholesale trade and government sectors. Job losses have occurred primarily in manufacturing, with slight losses in the TPU and the Finance, Insurance, and Real Estate (FIRE) sectors. Figure 2-8 shows the average annual payroll of each sector for Coos County and the State of Oregon.
As shown in Figure 2-8, average payrolls for all industry division groups in Coos County are lower than state averages. The largest differentials occur in the wholesale trade and FIRE sectors.

The shift in economy and lower average payrolls have had the combined impact of lower average per capita income in Coos County than the state as a whole. Different than average annual payroll which is based on total number of workers in an industry, per capita income is based on total number of persons in a geographic area— in this case, Coos County. Per capita income also includes non-employment-related income, such as transfer payments and rental income. The per-capita-income differential between Coos County and the state average has increased slightly in recent years as shown in Figure 2-9.
FIGURE 2-9
PER CAPITA INCOME (CURRENT DOLLARS)
COOS COUNTY VS. STATE OF OREGON

Source: Bureau of Economic Analysis.

Increases in per capita income in Coos County have just kept pace with inflation since 1984. Figure 2-10 shows per capita income in current and constant (1984) dollars deflated using the Consumer Price Index for all urban consumers in the western U.S.

FIGURE 2-10
COOS COUNTY PER CAPITA INCOME, CURRENT AND CONSTANT (1984) DOLLARS

Source: Bureau of Economic Analysis (Income Estimates); and Bureau of Labor Statistics (Inflation Estimates).

The U.S. Bureau of Economic Analysis estimates show that average per capita income in 1994 in Coos County was $17,225, 84.1 percent of the State average of $20,471, and 79.4 percent of the national average of $21,696. This income Figure 2-is a combination of earnings (including wages and salaries, other labor income and proprietors' income); dividends, interest, and rent; and transfer payments. The breakdown of income in Coos County versus the State of Oregon is shown in Figure 2-11.
Earnings comprise a smaller proportion of personal income in Coos County (56 percent) than in the state as a whole (66 percent). This proportion is offset by a larger share of transfer payments (26 percent versus the state's 17 percent), which include retirement and disability insurance, unemployment insurance, veterans benefits, Aid to Families with Dependent Children (AFDC), and food stamps. The higher proportion of transfer payments can be attributed, in part, to the relatively high percentage of older citizens in Coos County.

**Prospective Industrial and Commercial Uses**

The historical dependence of Oregon's economic base on agricultural and forest products industries has declined over the past four decades, and has been replaced by a much broader range of industrial and service activity. Some parts of the state have developed niches of industry (such as Washington County's high-technology industry). The south coast and Bay Area have developed strong retail and service sectors, fueled primarily from the changing demographics and industrial base of the area. Based on the economic opportunities analysis, a number of industrial and commercial uses could reasonably be expected to locate or expand in the planning area. These potential uses have been identified from the industrial and commercial analyses and national, state, and local trends. They include:

- Heavy industry;
- Tourist-commercial;
- A multi-user ("incubator") shipping dock; and
- Additional medical facilities.

These prospective industrial and commercial uses have been identified based on available information about national, state, and local trends. They have specific site and locational requirements which are discussed below.
Heavy Industry
The Bay Area is the only remaining site (of the original potential sites) identified by Nucor Steel Corporation for location of a new steel mill. Nucor Steel’s interest in the prospect of acquiring property from Weyerhauser Company on the Bay’s North Spit is due, in large part, to the immediate adjacency to the deep-water channel. The impending negotiations regarding selection of this site relate to the resolution of several potential shortcomings of this site. These shortcomings include a lack of public facilities (specifically a natural gas line and high-voltage power line) and lack of quick access to Interstate 5 (approximately one and one-half hours away on Route 101 connecting to Route 38 [to points north] or Routes 101 and 42 [to points south]).

The establishment of a Nucor Steel mill in the Bay Area would represent a diversification of the industrial base which would likely generate additional opportunities for additional industry, including related assembly plants and distribution facilities.

Tourist-Commercial/Retail
A decline of industrial uses has often resulted in blighted areas of abandoned warehouses, piers, and other remnants of former industrial uses. Many waterfront cities in the U.S. and Oregon have launched waterfront revitalization projects, encouraging redevelopment with a mix of commercial, residential, recreational, and industrial uses. Some such redevelopments have successfully preserved the historical character of the waterfront, while encouraging a sense of civic pride with increased activity and tourism.

Growth in retail sales and retail buying power in the Bay Area has been strong, reflected by recent renovations of the Pony Village Mall, the new development of the North Bay Shopping Center, and vigorous retail activity in the downtowns of Coos Bay and North Bend. A potential outgrowth of this retail-commercial activity would be the expansion of tourist-commercial activity in the waterfront area. Some potential commercial uses for this area might include overnight lodging, different types of food service, and additional retail development.

Expanded commercial uses would serve to capture an increasing proportion of consumer spending in the Bay Area, thereby further increasing the economic diversity of the community. In addition to the natural beauty, industrial intrigue, and historic character of the Bay Area waterfront, the area enjoys the high visibility and relative ease of access provided by Highway 101.

Multi-User Shipping Docks
The availability of the deep-water channel, berth space, and back land would support the development of shipping docks designed for multiple smaller users. The success of other “incubator”-type operations in the Bay Area suggests that the coordination of such docks would be well-received by users with more sporadic and smaller-scale shipping needs. In addition to adjacency to the deep-water channel, such an operation would require berth space and back land adequate to support the transfer and storage needs of multiple users.

Additional Medical Facilities
The Bay Area’s medical services have grown in economic significance. With the changing demographics of the area and the loss of timber as the predominant industry, the Bay Area has become a
regional medical center. With 750 full- and part-time employees, Bay Area Hospital is the Oregon Coast’s largest medical facility. Bay Area Hospital is currently undergoing a three- to five-year expansion to add 40,000 square feet—representing an investment of $8 to $10 million. Continued growth will depend on the adequacy of public facilities and appropriately designated lands to support development.

**Prospective Uses Summary**

These prospective industrial and commercial uses have been identified based on available information about national, state, and local trends. Existing uses, including the continued shipping of wood products, are expected to continue with some limited growth.

**MARKET ANALYSIS**

The market analysis sets the context for regional planning efforts with an overall evaluation of the size and strength of land use markets which will require appropriately designated lands. This market analysis evaluates the demand for a variety of land uses and is intended to guide regional planning efforts, identifying public need for lands designated for specific uses. Unlike a traditional market study, it does not determine demand for a particular use at a particular site or provide a competitive analysis and identification of a market niche for a specific proposal.

**Housing Analysis**

With little recent population growth, demand for additional housing units in Coos County has been generated primarily from structural changes in the economic and demographic makeup of the community. For example, decreasing household size has led to an increase in the number of households in Coos County, despite a net loss in population since 1980. Population levels, however, have recovered in recent years, with the population returning roughly to its 1980 level, despite some significant losses in the late 1980s.

The population and employment forecast prepared by OEA anticipates that recent growth will continue at a rate of just under one-half percent annually. The anticipation of this growth is due, in part, to the economic strength of the state as a whole. These anticipated growth rates will result in the population of Coos County reaching approximately 63,600 by year 2000, and continuing to increase, reaching nearly 70,000 by year 2020. This trend is shown in comparison to historical growth in Figure 2-12.
In the absence of other factors, population growth results in an increase in household formations. As the population grows, new families and incoming migrants require additional housing units. For Coos County, an additional factor is the declining household size. As noted earlier, the number of households in Coos County increased from 23,790 to 24,193 between 1980 and 1990, despite a net loss in population of nearly 3,800 people. It is unlikely that such a dramatic shift in household size (from an average of 2.69 persons per household to an average 2.49 persons per household) is sustainable for long periods of time; however, it is likely that the trend will continue, albeit at a decreasing rate. Therefore, this analysis assumes the following:

- Population increases will occur at the rate projected by OEA;
- Household size will continue to decrease, but at a decreasing rate; and
- Frictional vacancy (the vacancy rate necessary to allow for choice and movement in the market) is 5 percent.

Population and household size assumptions suggest that Coos County will house over 30,000 households by year 2020, nearly 25 percent more households than in 1990. Table 2-5 shows the forecasts in five-year increments.

**TABLE 2-5**

**HOUSING DEMAND ANALYSIS, 1995 TO 2020**

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Population</td>
<td>60,273</td>
<td>62,100</td>
<td>63,612</td>
<td>64,950</td>
<td>66,338</td>
<td>67,870</td>
<td>69,513</td>
</tr>
<tr>
<td>Average Persons/HH</td>
<td>2.49</td>
<td>2.42</td>
<td>2.38</td>
<td>2.35</td>
<td>2.33</td>
<td>2.31</td>
<td>2.30</td>
</tr>
<tr>
<td>Households</td>
<td>24,193</td>
<td>25,611</td>
<td>26,737</td>
<td>27,664</td>
<td>28,518</td>
<td>29,367</td>
<td>30,215</td>
</tr>
</tbody>
</table>

Applying a five percent vacancy rate to these household projections, DEA estimates that there will be an increase of nearly 2,200 housing units by year 2005, and nearly 5,000 housing units by year 2020 in Coos County. Table 2-6 shows the anticipated demand in five-year increments.
TABLE 2-6  
INCREASE IN HOUSING UNITS REQUIRED, 1995 TO 2020  
COOS COUNTY

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Increase in Households</td>
<td>1,418</td>
<td>1,126</td>
<td>927</td>
<td>855</td>
<td>849</td>
<td>848</td>
<td>4,606</td>
</tr>
<tr>
<td>Increase in Housing Units Required</td>
<td>1,493</td>
<td>1,185</td>
<td>976</td>
<td>900</td>
<td>893</td>
<td>893</td>
<td>4,847</td>
</tr>
</tbody>
</table>

As indicated by Table 2-6, over 1,400 new households were formed in Coos County between 1990 and 1995. Building activity has been brisk with building permits issued for 1,417 housing units between 1990 and 1994, as shown in Table 2-7.

TABLE 2-7  
BUILDING ACTIVITY IN RELATION TO HOUSING DEMAND  
COOS COUNTY, OREGON

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Increase in Households</td>
<td>1,418</td>
<td>1,126</td>
</tr>
</tbody>
</table>

Less Permits Issued:*  

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Single-Family Units</td>
<td>682</td>
<td>75</td>
</tr>
<tr>
<td>Multi-Family Units</td>
<td>206</td>
<td>124</td>
</tr>
<tr>
<td>Manufactured Housing</td>
<td>529</td>
<td>131</td>
</tr>
<tr>
<td>Total Permits issued</td>
<td>1,417</td>
<td>330</td>
</tr>
<tr>
<td>Housing demand not met by permitted building</td>
<td>1</td>
<td>796</td>
</tr>
</tbody>
</table>

* Includes a lag for permitted building to be realized as housing units.

Source: Portland State University Center for Population Research and Census (Building Permit Data).

The type of housing actually chosen will depend on a variety of factors, including household size, age, and income, as well as lifestyle choices and regional development patterns.

Regional Development Patterns

The Cities of Coos Bay and North Bend are growing at a faster rate than Coos County as a whole. This trend, coupled with strong regional planning efforts to guide development, indicates that the population will continue current patterns of increased urbanization. However, the physical constraints of the area make it unlikely to sustain higher growth rates than county average for long periods of time. These constraints include availability of land and housing, congestion, water capacity, and other infrastructure limitations. Therefore, the OEA methodology assumes that the trend toward increased urbanization will continue, but at a decreasing rate.

As noted earlier, the population of the core Bay Area (Cities of Coos Bay and North Bend) was 41.2 percent of the Coos County total in 1996, according to the PSU CPRC population estimates, up from 40.3 percent in 1980. Applying the OEA methodology as adopted by Coos County, the population of the core Bay Area--represented by the Cities of Coos Bay and North Bend--is estimated to be over 41 percent of the total county population by year 2020. In addition to the population increases forecast for
Coos County, declining household size and increased urbanization suggest that household formations will be faster in the core Bay Area than the rest of the county, as shown in Table 2-8.

**TABLE 2-8**
**HOUSING DEMAND ANALYSIS**
**CORE BAY AREA**

<table>
<thead>
<tr>
<th>Year</th>
<th>Coos County population</th>
<th>Core Bay Area population</th>
<th>Average Persons per HH</th>
</tr>
</thead>
<tbody>
<tr>
<td>1980</td>
<td>64,047</td>
<td>25,804</td>
<td>2.69</td>
</tr>
<tr>
<td>1990</td>
<td>60,273</td>
<td>24,690</td>
<td>2.49</td>
</tr>
<tr>
<td>1995</td>
<td>61,700</td>
<td>25,285</td>
<td>2.42</td>
</tr>
<tr>
<td>1996</td>
<td>63,612</td>
<td>25,693</td>
<td>2.42</td>
</tr>
</tbody>
</table>

(County Average)

<table>
<thead>
<tr>
<th>Year</th>
<th>Coos County population</th>
<th>Core Bay Area population</th>
<th>Average Persons per HH</th>
</tr>
</thead>
<tbody>
<tr>
<td>2000</td>
<td>63,126</td>
<td>26,192</td>
<td>2.38</td>
</tr>
<tr>
<td>2005</td>
<td>64,950</td>
<td>26,743</td>
<td>2.35</td>
</tr>
<tr>
<td>2010</td>
<td>66,338</td>
<td>27,315</td>
<td>2.33</td>
</tr>
<tr>
<td>2015</td>
<td>67,870</td>
<td>27,945</td>
<td>2.31</td>
</tr>
<tr>
<td>2020</td>
<td>69,513</td>
<td>28,622</td>
<td>2.30</td>
</tr>
</tbody>
</table>

Applying the five-percent vacancy rate to the household projections, this analysis suggests that an additional 1,000 housing units will be required in the core Bay Area by year 2005, and over 2,100 additional units by year 2020. Table 2-9 shows the anticipated demand in five-year increments.

**TABLE 2-9**
**INCREASE IN HOUSING UNITS REQUIRED**
**CORE BAY AREA, 1995 TO 2020**

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Increase in Households</td>
<td>537</td>
<td>577</td>
<td>375</td>
<td>343</td>
<td>374</td>
<td>347</td>
<td>2,016</td>
</tr>
<tr>
<td>Increase in Housing Units Required</td>
<td>565</td>
<td>607</td>
<td>395</td>
<td>361</td>
<td>394</td>
<td>365</td>
<td>2,122</td>
</tr>
</tbody>
</table>

In addition, recent development patterns have reflected a greater proportion of total demand for higher-density housing. Nearly one-fifth of all building permits issued since 1990 are for multi-family housing, as shown in Figure 2-13.
Impact of Household Size

Historically, most households in Coos County have chosen to live in single-family detached housing. In addition to creating a faster rate of housing formations, shrinking household size also has implications for the types of housing required to meet this housing demand. For example, public use microdata sample (PUMS) data from the 1990 census show that 90 percent of all households sampled in the south coast public use microdata area\(^2\) (PUMA) were either in traditional ("stick-built") single-family detached housing or manufactured housing. However, when the number of persons per household is considered, the data show that only 79 percent of one-person households choose single-family and manufactured housing, while 12 percent choose apartments, and the remaining 9 percent live in some form of attached housing. The division of housing type by household size is shown in Table 2-10.

---

\(^2\) The south coast PUMA is a sample of households in Coos, Curry, Douglas, and Josephine Counties.
### TABLE 2-10

**HOUSING TYPES OCCUPIED**

**BY NUMBER OF PERSONS PER HOUSEHOLD**

**COOS, CURRY, DOUGLAS, AND JOSEPHINE COUNTIES, 1990**

<table>
<thead>
<tr>
<th>Persons in Household</th>
<th>SF Detached and Manufactured</th>
<th>Single-family Attached</th>
<th>Two-, Three or Four-plex Apartments</th>
<th>Grand Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>79%</td>
<td>3%</td>
<td>6%</td>
<td>12%</td>
</tr>
<tr>
<td>2</td>
<td>90%</td>
<td>1%</td>
<td>5%</td>
<td>3%</td>
</tr>
<tr>
<td>3</td>
<td>90%</td>
<td>0%</td>
<td>6%</td>
<td>3%</td>
</tr>
<tr>
<td>4</td>
<td>91%</td>
<td>2%</td>
<td>4%</td>
<td>3%</td>
</tr>
<tr>
<td>5</td>
<td>94%</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>6</td>
<td>96%</td>
<td>4%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>7 or more</td>
<td>100%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td><strong>Total Households</strong></td>
<td><strong>90%</strong></td>
<td><strong>2%</strong></td>
<td><strong>4%</strong></td>
<td><strong>3%</strong></td>
</tr>
</tbody>
</table>

Source: U.S. Census Public Use Microdata Samples, tabulated by David Evans and Associates, Inc.

Between 1980 and 1990, the number of one-person households in Coos County increased from 4,956 to 5,889. Although neither OEA nor PSU CPRC estimates household size or the division of persons per household, a decline in household size is expected to continue at a slightly decreasing rate. The implication of this analysis is that over 10 percent of Coos County households will require some type of housing other than single-family housing.

**Impact of Household Income**

The disposable income of a household also serves to determine the range of choices that a household can make about housing. One concern in providing housing is the current lending criteria of for-sale units. The mortgage lending community evaluates households for mortgage qualification on a number of factors, including:

- The ratios of income to total monthly housing cost (principal, interest, taxes, and insurance);
- The applicant's down payment capability and financial condition; and
- The applicant's credit history.

According to the Coos County Assessor's Office, the average sale price of a home in Coos County was $81,000 in 1995. Under current lending conditions, purchase of a $81,000 home requires monthly income of roughly $2,400 (or an annual income of approximately $29,000). Since Coos County has a median household income of approximately $26,000, fewer than half the households in Coos County are currently able to acquire single-family housing. Figure 2-14 shows the household income distribution and median household income for Coos County.
Implications for density and the amount of land designated for residential uses are discussed in a separate technical memorandum, Regional Site Availability, and will be further discussed in Phase II, Regional Land Needs Projections.

Industrial and Office-Commercial Analysis
The Bay Area economy includes a number of industries. The following discussion of some key industries provides the basis for the analysis relating to demands for industrial and office-commercial space.

Impact of the Visitor Industry
During the past fifteen years, the Bay Area has worked to diversify its resource-based economy by developing infrastructure for the visitor industry and promoting area attractions and amenities. Tourism has become a major industry, and it is a cornerstone of diversification of the entire region. While the cities of Coos Bay and North Bend have benefited from proximity to major coastal attractions and from their location on Highway 101, other cities and towns would like to receive more benefit from visitors who pass through their communities, and from those who visit surrounding attractions such as the public beaches, the Oregon Dunes National Recreation Area, and Oregon State Parks.

Local communities have determined that they can increase their benefit from the traveling public by attracting more visitors and increasing visitor stays in the community. The cities of Coos Bay and North Bend, the Port, and Coos County have developed long-term tourism strategies, and other jurisdictions are making investments to enhance the image of the Coos Bay region. To accomplish this, the communities must take advantage of their nearest and most unique resource—the Coos Bay Estuary.

The history and culture of the cities of Coos Bay and North Bend are tied to waterfront activity. During the most recent decades, however, urban waterfronts have become industrial "enclaves" to which the
general public has little access. In addition, waterfront industrial activity has decreased, primarily due to changes in the wood products industry and world market conditions. With fewer citizens employed on the waterfront, and little access to the waterfront, the result is a local citizenry with limited understanding of its own heritage.

Because connections to the waterfront are important to the region's history, the cities would like to reclaim their waterfront heritage. The cities believe this can be done by redeveloping their urban waterfronts to allow public access to waterfront areas, restore community identity and pride, and attract visitors. The result will be redeveloped areas which provide an increased contribution to the economic well-being of the cities.

The North Bend Urban Renewal Plan identifies the downtown waterfront area as commercial waterfront. The city of North Bend is purchasing land for parking and other facilities while forming the necessary partnerships with public and private entities. The city has initiated the North Bend Downtown Waterfront Design Plan to develop the downtown waterfront area as a tourist commercial area.

The City of Coos Bay has initiated the Front Street Master Plan to develop Front Street as an historic district that will provide a destination attraction for visitors.

In order to carry out these plans, local jurisdictions are seeking to change the Coos Bay Estuary Management Plan to allow mixed use waterfronts and remove the ESWD restrictions which currently stifle development of these highly urbanized waterfront areas.

The Oregon Tourism Commission estimates that tourism contributes over $81 million dollars annually to the Coos County economy. Of this spending, nearly $20 million occurs at eating and drinking establishments, more than $17 million at retail sales outlets, and nearly $14 million in accommodations. Travel spending by type of business is shown in Figure 2-15.
In reviewing traveler spending by type of visitor accommodation, it is noteworthy that campers are a significant part of the visitor industry in Coos County. As a percentage of all visitors, travelers staying at private and public campgrounds are more significant for Coos County than for the state as a whole. In 1995, Coos County campground visitors accounted for 33 percent of spending by all visitors, compared to the state average of only 16 percent, as shown in Figure 2-16.
In 1995, it is estimated that over 1,400 jobs were created as a result of travel spending. Although nearly half (46 percent) of these jobs were in eating and drinking establishments, some job creation occurred in the categories of accommodations, food stores, air and ground transport, recreation, retail sales, and travel arrangement. The number of jobs are shown by type of business in Figure 2-17.
Impact of the Fishing Industry

Charleston Harbor in Coos Bay is a major commercial fishing and seafood-processing center, as well as a major sport fishing center. According to the Oregon Department of Fish and Wildlife, fishermen operating out of Coos Bay harvest all major species of fish including salmon (an estimated 3 percent by dollar value in 1995), crab (14 percent), shrimp (20 percent), tuna (1 percent), and groundfish, including rockfish, flatfish, Pacific whiting, and ling cod (61 percent). The total value of all landings in Coos County was approximately $15 million in 1995.

Since the 1950s, issues related to water quality prohibited oyster production in the Bay Area (with the exception of the South Slough). Oyster production returned to Coos Bay with water quality improvements undertaken during the mid-1980s. Since this resurgence, oyster production in Coos Bay has grown significantly. According to Paul Heikkila, Marine Extension Agent with Oregon State University, Coos Bay is now the largest oyster-producing estuary in the State of Oregon. Qualman Oyster Company is currently expanding its operations, including additional larvae-raising facilities. Three additional companies, the Coos Bay Oyster Company, the North Bend Oyster Company, and Clausen Oyster Company, have been formed since the 1980s. Clausen recently completed a significant expansion, including a $1 million shucking facility. Additional growth opportunities for the oyster industry are constrained by limited transportation facilities. With limited refrigerated air transport from the North Bend Municipal Airport, oysters are currently transported by truck to Portland or San Francisco for air transport.

The land use implications of the fishing industry occur primarily through the processing of fish products. Although fishing, hunting, and trapping together provided 124 covered employment positions in 1995, the production needs are reflected in manufacturing employment figures. Inasmuch as the commercial fishing vessels require moorage space, there will be an impact on the lands adjacent to the bay.

Impact of the Forestry Industry

Wood products shipped through Coos Bay originate from as far north as Portland and as far south as Scotia, California, with the primary areas of origination being in Coos, Curry, Douglas, Jackson, Josephine, Lane, and surrounding counties. According to research conducted by the World Forestry Institute, the resource boundaries are generally 150 miles for shipping wood chips and for lumber, up to 250 miles. Coos Bay will receive more business from sources closer to the Bay because of the costs of transporting wood products. Table 2-11 shows the historical distribution of wood products by county in the six-county area.
TABLE 2-11
TIMBER VOLUME REMOVED (THOUSANDS OF BOARD FEET)

<table>
<thead>
<tr>
<th></th>
<th>Coos County</th>
<th>Curry County</th>
<th>Douglas County</th>
<th>Jackson County</th>
<th>Josephine County</th>
<th>Lane County</th>
<th>6-County Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1960</td>
<td>671,573</td>
<td>464,202</td>
<td>1,542,786</td>
<td>454,667</td>
<td>166,054</td>
<td>1,307,947</td>
<td>4,607,229</td>
</tr>
<tr>
<td>1965</td>
<td>667,667</td>
<td>352,636</td>
<td>1,647,683</td>
<td>443,483</td>
<td>147,209</td>
<td>1,528,438</td>
<td>4,787,116</td>
</tr>
<tr>
<td>1970</td>
<td>372,923</td>
<td>277,277</td>
<td>1,390,986</td>
<td>313,350</td>
<td>121,174</td>
<td>1,284,937</td>
<td>3,760,647</td>
</tr>
<tr>
<td>1975</td>
<td>498,299</td>
<td>155,276</td>
<td>1,162,240</td>
<td>323,822</td>
<td>105,082</td>
<td>1,019,024</td>
<td>3,263,743</td>
</tr>
<tr>
<td>1980</td>
<td>297,041</td>
<td>169,336</td>
<td>1,135,751</td>
<td>317,575</td>
<td>149,378</td>
<td>979,478</td>
<td>3,048,559</td>
</tr>
<tr>
<td>1985</td>
<td>449,998</td>
<td>125,479</td>
<td>1,313,066</td>
<td>460,089</td>
<td>89,730</td>
<td>1,284,582</td>
<td>3,722,944</td>
</tr>
<tr>
<td>1990</td>
<td>409,373</td>
<td>122,505</td>
<td>980,300</td>
<td>274,848</td>
<td>80,891</td>
<td>890,158</td>
<td>2,758,075</td>
</tr>
<tr>
<td>1995</td>
<td>327,109</td>
<td>72,685</td>
<td>455,758</td>
<td>162,466</td>
<td>55,143</td>
<td>561,685</td>
<td>1,634,846</td>
</tr>
</tbody>
</table>

Source: Oregon Department of Forestry.

As Figure 2-18 indicates, Lane and Douglas Counties comprise the largest proportions of timber harvest in the six-county area affecting Coos Bay. The proportion harvested in Coos County has increased since 1960, mostly due to decreases in timber harvests in general.

FIGURE 2-18
ESTIMATED COUNTY DISTRIBUTION OF TIMBER HARVEST

1960
- Lane 28%
- Coos 15%
- Curry 10%
- Josephine 4%
- Jackson 10%
- Douglas 33%

1995
- Lane 20%
- Coos 20%
- Curry 4%
- Josephine 3%
- Jackson 10%
- Douglas 28%

Source: Oregon Department of Forestry.

As Table 2-12 indicates, private sector sources produced fully two-thirds of the timber harvest in the six-county area, and over 90 percent of the timber harvest in Coos and Curry Counties.
TABLE 2-12
TIMBER HARVEST BY OWNERSHIP, 1995

<table>
<thead>
<tr>
<th></th>
<th>Private Industry</th>
<th>Private Non-Ind.</th>
<th>State</th>
<th>BLM</th>
<th>USFS</th>
<th>Other Public</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Coos County</td>
<td>78%</td>
<td>14%</td>
<td>2%</td>
<td>4%</td>
<td>0%</td>
<td>2%</td>
<td>100%</td>
</tr>
<tr>
<td>Curry County</td>
<td>67%</td>
<td>26%</td>
<td>0%</td>
<td>0%</td>
<td>7%</td>
<td>0%</td>
<td>100%</td>
</tr>
<tr>
<td>Douglas County</td>
<td>58%</td>
<td>21%</td>
<td>0%</td>
<td>10%</td>
<td>10%</td>
<td>0%</td>
<td>100%</td>
</tr>
<tr>
<td>Jackson County</td>
<td>57%</td>
<td>18%</td>
<td>0%</td>
<td>11%</td>
<td>14%</td>
<td>0%</td>
<td>100%</td>
</tr>
<tr>
<td>Josephine County</td>
<td>26%</td>
<td>36%</td>
<td>0%</td>
<td>6%</td>
<td>26%</td>
<td>5%</td>
<td>100%</td>
</tr>
<tr>
<td>Lane County</td>
<td>73%</td>
<td>12%</td>
<td>0%</td>
<td>4%</td>
<td>10%</td>
<td>0%</td>
<td>100%</td>
</tr>
<tr>
<td>Six-County Average</td>
<td>67%</td>
<td>17%</td>
<td>0%</td>
<td>6%</td>
<td>9%</td>
<td>1%</td>
<td>100%</td>
</tr>
</tbody>
</table>

Source: Oregon Department of Forestry.

William Lansing, President of Forest Products Group, Menasha Corporation located in North Bend, oversees Menasha’s holdings from Sacramento, California to Federal Way, Washington. Lansing stated that the Bay Area has much private timberland, and that this will determine the future of the forest industry in the area. According to Lansing, this Douglas Fir is “commodity wood” which lay people refer to as wood harvested from “plantation forests.” Forest products companies in the Bay Area will be a milling point for this timber. Much of this young timber in southwestern Oregon will be ready to be on the market in the next decade.

In the past decade, two new mills opened in the Bay Area which no longer use the equipment designed for old growth logs. These mills include Weyerhaeuser’s CBX mill which processes lumber to metric dimensions and the Georgia Pacific mill; both are located in the Bunker Hill area of Coos County, south of the City of Coos Bay. In January 1998, Weyerhaeuser Company announced it will close its CBX mill and North Bend export dock.

According to Lansing, the two new mills are a sign of “a new era in the industry dawning in the Bay Area.” He believes that the area with its deep water port is in a great position to benefit from the second growth timber, and that the deep water port of Coos Bay will add value to the product. Domestic markets will likely include California and Hawaii. Overseas markets will include Japan, China, Taiwan, New Zealand, the Mediterranean, and others.

Impact of the Shipping Industry

The Port of Coos Bay, one of five deep draft ports in Oregon, is one of North America’s largest shipping centers for timber, and the second largest port in Oregon, by cargo volume. The project to increase the depth of the navigation channel to -37 feet MLLW (Mean Lower Low Water) is scheduled for completion by October. Because of economies of scale provided by larger ships using the newly deepened channel, the Port of Coos Bay is expected to be able to offer more competitive shipping charges. As Figure 2-19 indicates, the dominant export commodity is wood chips.

Bay Area Comprehensive Economic Analysis

April 30, 1998
Since 1976, wood chips have accounted for over 70 percent of total exports. Log exports have been the second most significant in terms of exported tonnage. Regulations that restrict the export of logs harvested on federal land, together with a 1990 decision by Weyerhaeuser Company to stop exporting logs from Coos Bay, led to a decline in the amount of logs exported. Additional fluctuations in export volume occur as a result of changing world economic conditions. Table 2-13 shows amount of wood products by type of product exported from Coos Bay from 1976 to 1996.
TABLE 2-13
PRODUCTS OUTBOUND FROM COOS BAY
(IN SHORT Metric TONS)

<table>
<thead>
<tr>
<th></th>
<th>Wood Chips</th>
<th>Logs</th>
<th>Lumber</th>
<th>Plywood</th>
<th>Paper Products</th>
<th>Copper Ore</th>
<th>Other</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1976</td>
<td>3,668,707</td>
<td>574,220</td>
<td>642,868</td>
<td>92,289</td>
<td>81,328</td>
<td>7,495</td>
<td>5,066,907</td>
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</tr>
<tr>
<td>1977</td>
<td>3,870,020</td>
<td>492,357</td>
<td>599,146</td>
<td>58,334</td>
<td>72,112</td>
<td>7,229</td>
<td>5,099,198</td>
<td></td>
</tr>
<tr>
<td>1978</td>
<td>3,406,085</td>
<td>572,314</td>
<td>598,511</td>
<td>65,022</td>
<td>10,178</td>
<td>252</td>
<td>4,652,362</td>
<td></td>
</tr>
<tr>
<td>1979</td>
<td>4,057,402</td>
<td>522,349</td>
<td>680,581</td>
<td>106,826</td>
<td>22,564</td>
<td>239</td>
<td>5,389,961</td>
<td></td>
</tr>
<tr>
<td>1980</td>
<td>3,566,570</td>
<td>543,434</td>
<td>469,706</td>
<td>83,848</td>
<td>36,717</td>
<td></td>
<td>4,700,275</td>
<td></td>
</tr>
<tr>
<td>1981</td>
<td>2,918,695</td>
<td>457,839</td>
<td>368,193</td>
<td>113,871</td>
<td>25,645</td>
<td>274</td>
<td>3,884,517</td>
<td></td>
</tr>
<tr>
<td>1982</td>
<td>2,693,546</td>
<td>794,266</td>
<td>372,836</td>
<td>66,375</td>
<td>17,414</td>
<td>7,608</td>
<td>3,952,045</td>
<td></td>
</tr>
<tr>
<td>1983</td>
<td>2,620,397</td>
<td>593,606</td>
<td>410,365</td>
<td>117,399</td>
<td>43,373</td>
<td>56,357</td>
<td>3,841,497</td>
<td></td>
</tr>
<tr>
<td>1984</td>
<td>2,685,781</td>
<td>857,245</td>
<td>384,792</td>
<td>61,661</td>
<td>26,897</td>
<td>272,597</td>
<td>4,288,973</td>
<td></td>
</tr>
<tr>
<td>1985</td>
<td>2,728,209</td>
<td>1,304,851</td>
<td>359,315</td>
<td>30,589</td>
<td>18,418</td>
<td>1,490</td>
<td>4,442,872</td>
<td></td>
</tr>
<tr>
<td>1986</td>
<td>2,743,681</td>
<td>943,655</td>
<td>375,828</td>
<td>62,899</td>
<td>21,729</td>
<td>351</td>
<td>4,148,143</td>
<td></td>
</tr>
<tr>
<td>1987</td>
<td>3,053,874</td>
<td>827,962</td>
<td>481,545</td>
<td>73,885</td>
<td>38,865</td>
<td>265</td>
<td>4,476,396</td>
<td></td>
</tr>
<tr>
<td>1988</td>
<td>3,255,955</td>
<td>1,428,787</td>
<td>576,950</td>
<td>74,076</td>
<td>47,711</td>
<td>7,244</td>
<td>5,390,723</td>
<td></td>
</tr>
<tr>
<td>1989</td>
<td>3,087,571</td>
<td>1,121,827</td>
<td>506,323</td>
<td>80,293</td>
<td>35,902</td>
<td>4,831,916</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1990</td>
<td>2,988,391</td>
<td>1,136,113</td>
<td>615,979</td>
<td>84,007</td>
<td>45,300</td>
<td>4,869,790</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1991</td>
<td>3,233,334</td>
<td>805,118</td>
<td>537,892</td>
<td>73,373</td>
<td>97,942</td>
<td>4,747,659</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1992</td>
<td>2,694,239</td>
<td>542,202</td>
<td>402,655</td>
<td>57,533</td>
<td>90,011</td>
<td>3,996</td>
<td>3,790,636</td>
<td></td>
</tr>
<tr>
<td>1993</td>
<td>2,304,549</td>
<td>722,972</td>
<td>326,979</td>
<td>25,913</td>
<td>61,408</td>
<td>332,350</td>
<td>4,039</td>
<td>3,778,210</td>
</tr>
<tr>
<td>1994</td>
<td>2,189,309</td>
<td>484,583</td>
<td>310,030</td>
<td>19,828</td>
<td>43,021</td>
<td>319,601</td>
<td>289</td>
<td>3,366,661</td>
</tr>
<tr>
<td>1995</td>
<td>2,402,328</td>
<td>489,665</td>
<td>322,769</td>
<td>16,479</td>
<td>34,347</td>
<td>272,855</td>
<td>1,031</td>
<td>3,539,474</td>
</tr>
<tr>
<td>1996</td>
<td>2,337,539</td>
<td>385,583</td>
<td>344,849</td>
<td>10,583</td>
<td>37,172</td>
<td>5,549</td>
<td>3,121,275</td>
<td></td>
</tr>
</tbody>
</table>

Source: Oregon International Port of Coos Bay.

Coos Bay is also a major shipper of nickel ore. Glenbrook Nickel Company imports about one million metric tons of ore annually at Glenbrook Nickel Peirce Terminal. The terminal was constructed in 1992 and represents an investment of approximately $36 million. Near the end of the channel, Glenbrook's facilities include ship unloading and truck loading facilities. From Glenbrook, the ore is trucked about 100 miles to Glenbrook's Riddle Smelter, using about 75 covered hopper trucks per day. Since coming on-line, Glenbrook's operations have made nickel ore the highest volume product inbound to Coos Bay, as shown in Table 2-14.

In 1995, the major shipper of Copper Ore in Coos Bay moved its business from Central Dock to another port in Oregon. As the company made a major investment in the new facility, it is unlikely that it will recommence operations in Coos Bay.
TABLE 2-14
PRODUCTS INBOUND FROM COOS BAY
(IN SHORT TONS)

<table>
<thead>
<tr>
<th></th>
<th>Lumber</th>
<th>Logs</th>
<th>Petroleum</th>
<th>Nickel Ore</th>
<th>Other</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1976</td>
<td>308,078</td>
<td>118,364</td>
<td>426,442</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1977</td>
<td>362,882</td>
<td>93,177</td>
<td>456,059</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1978</td>
<td>349,794</td>
<td>170,660</td>
<td>520,454</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1979</td>
<td>344,026</td>
<td>209,739</td>
<td>553,765</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1980</td>
<td>307,534</td>
<td>222,473</td>
<td>530,007</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1981</td>
<td>267,803</td>
<td>108,091</td>
<td>375,894</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1982</td>
<td>221,819</td>
<td>42,878</td>
<td>264,697</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1983</td>
<td>169,322</td>
<td>44,577</td>
<td>213,899</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1984</td>
<td>166,055</td>
<td>48,389</td>
<td>214,444</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1985</td>
<td>139,556</td>
<td>14,039</td>
<td>153,595</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1986</td>
<td>174,367</td>
<td>48,313</td>
<td>222,680</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1987</td>
<td>183,036</td>
<td>141,372</td>
<td>324,408</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1988</td>
<td>225,090</td>
<td>33,972</td>
<td>259,062</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1989</td>
<td>142,519</td>
<td>6,056</td>
<td>148,575</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1990</td>
<td>155,463</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1991</td>
<td>187,934</td>
<td>22,046</td>
<td>209,980</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1993</td>
<td>2,712</td>
<td>71,943</td>
<td>173,052</td>
<td>495</td>
<td>248,202</td>
<td></td>
</tr>
<tr>
<td>1994</td>
<td>263</td>
<td>36,340</td>
<td>66,194</td>
<td>102,797</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1995</td>
<td>5,955</td>
<td>43,870</td>
<td>62,482</td>
<td>586,776</td>
<td>699,083</td>
<td></td>
</tr>
<tr>
<td>1996</td>
<td>14,468</td>
<td>60,123</td>
<td>118,919</td>
<td>941,332</td>
<td>1,134,842</td>
<td></td>
</tr>
</tbody>
</table>

Source: Oregon International Port of Coos Bay.

Impacts of the Medical Sector

Bay Area Hospital

Bay Area Hospital is the largest employer in the Bay Area with 750 full- and part-time employees, and it is the largest hospital on the Oregon Coast. It is the largest and most sophisticated district hospital in the state, ranking about 10th of all hospitals in overall size and services, according to Dan Smith, Vice President-Clinical and Support Services of Bay Area Hospital.

Bay Area Hospital completed a Cancer Treatment Center in 1986, and is currently progressing with a 3-5 year expansion plan to add 40,000 square feet—an $8-10 million expansion, according to Smith. This is not expected to provide a big increase in staff, but will update facilities so that the hospital remains current and competitive. The medical industry is moving from inpatient to outpatient care, and the expansion will accommodate this change. The hospital has also considered a new medical oncology center, but one is not proposed at this time. The hospital recently converted the old Mormon Church into a home health agency/education center; approximately 2,000 square feet is leased to the American Red Cross.
Smith reports that the hospital is financially stable with no long-term debt, and thus is not vulnerable to a takeover. He notes that there are few other hospitals in Oregon in this enviable position.

Bay Area Hospital is a founding member of a consortium, “Health Future,” which administers workers compensation, liability insurance, and other services. This consortium provides stability and networking by involving numerous hospitals of various sizes.

Bay Area Hospital provides consulting services to smaller district hospitals in Bandon and Gold Beach through cooperative agreements. Consulting services include, but are not limited to, compliance with regulations, dietary matters, and ordering supplies in volume. On the other hand, Bay Area Hospital receives consultation from larger hospitals in the state through cooperative agreements. The consultations enhance referrals from the smaller to the larger hospitals.

Bay Area Hospital and the two major medical clinics in the area, Bay Clinic and North Bend Medical Center, are currently collaborating for shared staff and recruiting.

Other Facilities

Bay Clinic and the North Bend Medical Center are the other major medical facilities in the area. The North Bend Medical Center provides regional services with resident physicians located in Bandon, Coquille, Gold Beach and Brookings. Bay Orthopedic and South Coast Radiology, which provides MRI and Cat Scan services, also provide regional-level medical services. All of these facilities recently have undergone expansion. In addition, there are small independent offices providing services in the area. The Bay Area has two assisted living facilities and three long-term care facilities.

Associated Medical Business/Industry

Dan Smith stated that the Bay Area can expect to see expanded sales of durable medical equipment in the future, with rehabilitative and home care services increasing due to the aging population and the Bay Area’s growth in the retirement sector. One reason people select the Bay Area for their home is because it has good medical facilities, and this has helped bring small business entrepreneurs and new residents.

Impact of Southwestern Oregon Community College

Southwestern Oregon Community College (Southwestern), headquartered in Coos Bay, is the center for higher education for the entire community college district which extends from western Douglas County to the California border. Established in 1971, the college was the first of Oregon’s network of 16 community colleges. Southwestern continues to be a leader in developing continuing educational opportunities to meet the changing employment needs of the region.

Programs range from lectures, symposiums, seminars, and workshops to diplomas and associate degrees. The Associate of Arts degree allows students to transfer to any public four-year college or university in Oregon with junior standing. Upper-division courses leading to bachelor’s degrees are offered on the Southwestern campus through extension programs of Linfield College, Southern Oregon University, Eastern Oregon University, and Oregon State University. A master’s degree program in Business Administration is available through Portland State University.
Southwestern has been expanding its programs and facility in recent years. Southwestern recently completed a “One-Stop Center” which houses numerous agencies and college departments offering programs geared towards workforce development. This new center has come about as a result of partnerships with workforce development and social service program providers. The Southwestern Oregon Community College Business Development Center, which is housed in One-Stop Center, provides classes, seminars, workshops and informational services to develop and assist businesses.

A family center, which includes a child-care facility for students, was also completed this year. According to the College President, Dr. Stephen Kridelbaugh, the goal is to expand student housing capacity from 180 students to 400 to 600 students in the next few years so that students can be brought in from outside Oregon’s south coast to attend Southwestern. The student population from outside the immediate area has been limited by the lack of student housing. Dr. Kridelbaugh notes that 300 new students are the equivalent of 80 to 90 employees earning approximately $8.00 per hour, and that additional students will require new faculty.

Southwestern also provides cultural and educational programs to meet the needs of the changing population. Dr. Kridelbaugh stated that the college plans to construct a Performing Arts Center which will serve as a nucleus of cultural activity for the entire community college district.

**Baseline Space Needs Analysis**

One way to determine potential need for office and industrial space is to examine anticipated employment growth and evaluate space needs based on such growth. Although employment growth and development activity beyond these figures may occur, this analysis is based on the best information and data currently available. The State of Oregon Employment Department has forecast an increase of nearly 3,200 non-agricultural employment positions in Coos and Curry Counties from 1996 to 2006. As shown in Table 2-15, most of these increases are expected in the retail trade and service sectors.

<table>
<thead>
<tr>
<th>TABLE 2-15</th>
<th>BASELINE JOB GROWTH, 1996 TO 2006</th>
<th>COOS AND CURRY COUNTIES</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1996</td>
<td>2006</td>
</tr>
<tr>
<td>Construction &amp; Mining</td>
<td>1,100</td>
<td>1,270</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>3,840</td>
<td>3,530</td>
</tr>
<tr>
<td>TPU</td>
<td>1,720</td>
<td>1,780</td>
</tr>
<tr>
<td>Wholesale Trade</td>
<td>900</td>
<td>1,030</td>
</tr>
<tr>
<td>Retail Trade</td>
<td>6,130</td>
<td>7,010</td>
</tr>
<tr>
<td>FIRE</td>
<td>1,130</td>
<td>1,310</td>
</tr>
<tr>
<td>Services</td>
<td>5,570</td>
<td>7,320</td>
</tr>
<tr>
<td>Government</td>
<td>7,060</td>
<td>7,400</td>
</tr>
<tr>
<td>Total Nonagr. Employment</td>
<td>27,450</td>
<td>30,650</td>
</tr>
</tbody>
</table>

*TPU: Transportation, Communications, and Public Utilities.*

*FIRE: Finance, Insurance, and Real Estate.*

*Source: State of Oregon Employment Department.*

April 30, 1998
OEA has forecast a total increase of over 5,000 non-agricultural employment positions in Coos and Curry Counties by year 2020. These long-term projections are not disaggregated by industry. As noted earlier, the industrial breakdown of the south coast economy has shifted markedly since 1980 from a manufacturing-driven economy (25 percent manufacturing, 18 percent retail trade, 14 percent services, and 24 percent government) to a retail- and service-based economy in 1996 (14 percent manufacturing, 22 percent retail trade, 20 percent services, and 26 percent government). As noted in Table 2-15, the Employment Department expects this shift to continue in the future with manufacturing making up only 11.5 percent of all non-agricultural employment by year 2006. These trends suggest that the shift toward trade and services will continue, but that the shift will slow and the industry mix will stabilize somewhat, resulting in an industry mix as presented in Table 2-16. The figures presented here are trend analyses based on the best data currently available. As indicated earlier, there is the possibility that unexpected developments will occur, changing the employment and land needs outlook.

The projected decline in the manufacturing jobs can be attributed to the decline of the wood products and seafood processing industries. Wood processing increasingly relies on second growth timber, which does not produce as much volume as from old growth trees. In addition, the Weyerhaeuser CBX mill and dock closed in January 1998 because of the decline in demand for Douglas fir housing posts and beams in Japan.

<table>
<thead>
<tr>
<th>BASELINE JOB GROWTH, 2006 TO 2020</th>
<th>2006</th>
<th>2020</th>
<th>Change</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Construction &amp; Mining</td>
<td>1,270</td>
<td>1,368</td>
<td>98</td>
<td>7.7%</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>3,530</td>
<td>3,134</td>
<td>-396</td>
<td>-11.2%</td>
</tr>
<tr>
<td>TPU</td>
<td>1,780</td>
<td>1,751</td>
<td>-29</td>
<td>-1.7%</td>
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<tr>
<td>Wholesale Trade</td>
<td>1,030</td>
<td>1,086</td>
<td>56</td>
<td>5.5%</td>
</tr>
<tr>
<td>Retail Trade</td>
<td>7,010</td>
<td>7,610</td>
<td>600</td>
<td>8.6%</td>
</tr>
<tr>
<td>FIRE</td>
<td>1,310</td>
<td>1,381</td>
<td>71</td>
<td>5.4%</td>
</tr>
<tr>
<td>Services</td>
<td>7,320</td>
<td>8,658</td>
<td>1338</td>
<td>18.3%</td>
</tr>
<tr>
<td>Government</td>
<td>7,400</td>
<td>7,522</td>
<td>122</td>
<td>1.6%</td>
</tr>
<tr>
<td></td>
<td>30,650</td>
<td>32,510</td>
<td>1,860</td>
<td>6.1%</td>
</tr>
</tbody>
</table>

TPU: Transportation, Communications, and Public Utilities.
FIRE: Finance, Insurance, and Real Estate.

For each geographic area, industry code divisions show different trends toward the types of occupations they employ and, therefore, the types of space they use. Occupations can be generally classified as managers and administrators; professional and technical support; clerical and administrative support; service occupations; agriculture-related occupations; and production and operations laborers. As would be expected, mining, construction and manufacturing consist primarily of labor occupations, whereas the Finance, Insurance, and Real Estate (FIRE) sector generally comprises managerial, clerical, and sales occupations as shown in Table 2-17.
TABLE 2-17
OCCUPATION BY INDUSTRY, 1990
COOS AND CURRY COUNTIES

<table>
<thead>
<tr>
<th></th>
<th>Agr. Clerical</th>
<th>ProPr &amp; Sales</th>
<th>Prof &amp; Occup</th>
<th>Prof Occup</th>
<th>Prof Occup</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Workers /Admin</td>
<td>Managers</td>
<td>Labor</td>
<td>Tech.</td>
<td>Occup.</td>
</tr>
<tr>
<td>Mining and Construction</td>
<td>0.6% 12.8%</td>
<td>6.3% 74.2%</td>
<td>4.6% 0.4%</td>
<td>1.1% 100%</td>
<td></td>
</tr>
<tr>
<td>Manufacturing</td>
<td>15.9% 5.6%</td>
<td>3.2% 69.4%</td>
<td>2.6% 1.4%</td>
<td>2.0% 100%</td>
<td></td>
</tr>
<tr>
<td>TPU</td>
<td>0.6% 21.9%</td>
<td>6.0% 59.5%</td>
<td>6.5% 3.9%</td>
<td>1.6% 100%</td>
<td></td>
</tr>
<tr>
<td>Wholesale Trade</td>
<td>0.5% 23.8%</td>
<td>6.6% 44.1%</td>
<td>1.0% 22.4%</td>
<td>1.7% 100%</td>
<td></td>
</tr>
<tr>
<td>Retail Trade</td>
<td>0.0% 7.7%</td>
<td>4.2% 11.4%</td>
<td>2.1% 35.4%</td>
<td>39.2% 100%</td>
<td></td>
</tr>
<tr>
<td>FIRE</td>
<td>1.1% 56.2%</td>
<td>9.4% 3.5%</td>
<td>8.4% 19.2%</td>
<td>2.2% 100%</td>
<td></td>
</tr>
<tr>
<td>Services</td>
<td>0.7% 17.2%</td>
<td>5.4% 7.6%</td>
<td>37.0% 2.1%</td>
<td>29.9% 100%</td>
<td></td>
</tr>
<tr>
<td>Government</td>
<td>9.9% 18.2%</td>
<td>4.3% 11.8%</td>
<td>38.8% 0.0%</td>
<td>17.0% 100%</td>
<td></td>
</tr>
<tr>
<td>All Industries</td>
<td>5.8% 14.8%</td>
<td>4.9% 27.9%</td>
<td>16.4% 10.6</td>
<td>19.7% 100%</td>
<td></td>
</tr>
</tbody>
</table>

TFU: Transportation, Communications, and Public Utilities.
FIRE: Finance, Insurance, and Real Estate.

Source: State of Oregon Employment Department.

Even within these occupational distributions, the type of space required varies. For example, retail salespersons use retail-commercial space (which is more accurately determined by consumer buying patterns) and construction laborers generally perform their duties on jobsites. New employment in other labor categories will generally generate demand for industrial space.

The designation of the Port of Coos Bay as a deep draft port increases the geographic diversity of the origins and destinations of shipped products. Although there is a larger market area for shipping, increases in employment shown in Table 2-18 include growth in Coos and Curry Counties’ employment driven by economies of surrounding counties.

Water-dependent and water-related uses fall generally in the manufacturing and wholesale trade sectors. (More information and analysis relating to Water-Dependent and Water-Related uses and requirements is available in a separate technical memorandum, Plan and Policy Review and Analysis.) As shown in Table 2-18, the manufacturing sector is expected to experience continued losses, while wholesale trade is expected to grow somewhat, with a forecast increase of 82 jobs by year 2020.

Using standard space allocations for industrial space by industry division, employment growth is expected to create a net demand of nearly 275,000 square feet of industrial space. This need for industrial space flattens out over the long-term, with increases in trade and services offset by losses in manufacturing, as shown in Table 2-18. These space allocations are based on current practices of industrial space users; operational changes (such as increased automation) may occur, affecting the amount of space required to serve these industrial needs.

---

3 As shown in the Oregon International Port of Coos Bay Strategic Plan, Hobson Johnson & Associates, April, 1997.

April 30, 1998
TABLE 2-18
BASELINE DEMAND FOR INDUSTRIAL SPACE, 1996 TO 2020
COOS AND CURRY COUNTIES

<table>
<thead>
<tr>
<th>Industry</th>
<th>1996-2006</th>
<th>2006-2020</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Net Increase in Demand</td>
<td>Net New Industrial Workers (Square Feet)</td>
</tr>
<tr>
<td></td>
<td>(Decrease) in Industrial Workers</td>
<td>(Square Feet)</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>750</td>
<td>(215)</td>
</tr>
<tr>
<td>TPU</td>
<td>1,400</td>
<td>36</td>
</tr>
<tr>
<td>Wholesale Trade</td>
<td>1,100</td>
<td>57</td>
</tr>
<tr>
<td>Retail Trade</td>
<td>2,500</td>
<td>100</td>
</tr>
<tr>
<td>FIRE</td>
<td>350</td>
<td>6</td>
</tr>
<tr>
<td>Services</td>
<td>350</td>
<td>133</td>
</tr>
<tr>
<td>Government</td>
<td>350</td>
<td>40</td>
</tr>
<tr>
<td>Total All Industries</td>
<td>158</td>
<td>265,300</td>
</tr>
</tbody>
</table>

Total Long-Term Increase in Industrial Space: 274,400

T PU: Transportation, Communications, and Public Utilities.
FIRE: Finance, Insurance, and Real Estate.

Managerial, professional, and clerical employees generally all use office space. In addition, non-retail sales occupations (including insurance sales persons, real estate appraisers and brokers, and travel agents) also use office space. Using an average space per employee, it is expected that new employment will generate a net demand for approximately 500,000 square feet of general office space by year 2006, increasing to 800,000 square feet by year 2020, as shown in Table 2-19.

Approximately 300 square feet per employee for general office and 250 square feet per employee for government office, as reported in the Institute for Transportation Engineers Trip Generation (1991 edition).

Bay Area Comprehensive Economic Analysis

April 30, 1998
TABLE 2-19
BASELINE DEMAND FOR OFFICE SPACE, 1996 TO 2020
COOS AND CURRY COUNTIES

<table>
<thead>
<tr>
<th>Industry</th>
<th>1996-2006</th>
<th></th>
<th></th>
<th>2006-2020</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Space per</td>
<td>Net Increase</td>
<td>Net New</td>
<td></td>
<td>Net Increase</td>
<td>Net New</td>
</tr>
<tr>
<td></td>
<td>Employee</td>
<td>(Decrease)</td>
<td>Demand</td>
<td></td>
<td>(Decrease)</td>
<td>Demand</td>
</tr>
<tr>
<td></td>
<td></td>
<td>in Office</td>
<td>(Square</td>
<td></td>
<td>in Office</td>
<td>(Square</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Workers</td>
<td>Feet)</td>
<td></td>
<td>Workers</td>
<td>Feet)</td>
</tr>
<tr>
<td>Const &amp; Mining</td>
<td>300</td>
<td>41</td>
<td>12,300</td>
<td>24</td>
<td>7,100</td>
<td></td>
</tr>
<tr>
<td>Manufacturing</td>
<td>300</td>
<td>(40)</td>
<td>(11,900)</td>
<td>(51)</td>
<td>(3,400)</td>
<td></td>
</tr>
<tr>
<td>TPU</td>
<td>300</td>
<td>23</td>
<td>6,900</td>
<td>(11)</td>
<td>30</td>
<td></td>
</tr>
<tr>
<td>Wholesale Trade</td>
<td>300</td>
<td>70</td>
<td>21,000</td>
<td>30</td>
<td>9,100</td>
<td></td>
</tr>
<tr>
<td>Retail Trade</td>
<td>300</td>
<td>123</td>
<td>37,000</td>
<td>84</td>
<td>25,200</td>
<td></td>
</tr>
<tr>
<td>FIRE</td>
<td>300</td>
<td>168</td>
<td>50,300</td>
<td>66</td>
<td>19,900</td>
<td></td>
</tr>
<tr>
<td>Services</td>
<td>300</td>
<td>1,080</td>
<td>324,000</td>
<td>826</td>
<td>247,700</td>
<td></td>
</tr>
<tr>
<td>Government</td>
<td>250</td>
<td>208</td>
<td>52,100</td>
<td>75</td>
<td>18,600</td>
<td></td>
</tr>
<tr>
<td>Total All Industries</td>
<td>1,673</td>
<td>491,600</td>
<td>1,043</td>
<td>309,000</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Total Long-Term Increase in Office Space 800,600

TPU: Transportation, Communications, and Public Utilities.
FIRE: Finance, Insurance, and Real Estate.

These estimated space requirements are based on current employment projections by the Employment Department and OEA. They are intended to provide a representation of the magnitude of space demand, not a prediction of future building. Some increases in employment may absorb space already available but currently underutilized. Additionally, a single large employer could have significant impacts on employment growth in the Bay Area, and the resulting needs for industrial and office-commercial space.

Additional Industrial Growth Potential

In addition to the baseline estimates prepared by the Office of Economic Analysis and the Oregon Employment Department, there are two potential developments which could have significant impacts on employment and the resulting space needs in the Bay Area. This section describes the potential of a steel mill operator and a natural gas pipeline and distribution system in the Bay Area.

Potential Entry of a Steel Mill

A steel mill operator is currently considering three potential locations, including Coos County. Arthur Ayre of the Oregon Economic Development Department recently prepared an analysis of economic impacts from a steel mill in Coos County. His analysis revealed that entry of a new steel mill would have significant impacts on population and employment. These impacts would, in turn, affect regional planning efforts, in terms of the amount of land required for each use (housing, retail-commercial, office-commercial, or industrial).

Economic impacts are generally categorized as direct, indirect, and induced. Direct impacts include employment at the mill and increases in population caused by people relocating to Coos County to work at the mill. Indirect impacts include jobs created to support purchases for the mill’s operations and related increases in population. Induced impacts are those generated by increased spending made possible by direct and indirect employees’ incomes. In addition, a steel mill may have catalytic effects due to synergies between industries or improvements to transportation infrastructure.
The potential impacts of a steel mill with 250 employees at full buildout include indirect and induced employment and increases in population in Coos County and elsewhere in Oregon. The 250 direct employment positions would include 53 managerial and supervisory positions, 176 industrial labor positions, and 21 clerical positions, with significant implications for industrial space needs. The 313 indirect and induced positions created in Coos County would include positions in a range of industries, including retail and wholesale trade, services, manufacturing, and construction. These impacts are summarized in Table 2-20.

### TABLE 2-20

<table>
<thead>
<tr>
<th></th>
<th>Direct Impacts</th>
<th>Indirect Impacts</th>
<th>Induced Impacts</th>
<th>Total Impacts</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Employment</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>in Coos County</td>
<td>250</td>
<td>125</td>
<td>188</td>
<td>563</td>
</tr>
<tr>
<td>Statewide</td>
<td>N/A</td>
<td>125</td>
<td>188</td>
<td>313</td>
</tr>
<tr>
<td><strong>Population</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>in Coos County</td>
<td>165</td>
<td>47</td>
<td>71</td>
<td>283</td>
</tr>
<tr>
<td>Statewide</td>
<td>115</td>
<td>180</td>
<td>270</td>
<td>565</td>
</tr>
</tbody>
</table>

Source: Oregon Economic Development Department.

The 250 employees estimated for the mill would help offset the local economy's shift away from manufacturing, as evidenced by a loss of 2,140 manufacturing jobs in Coos County between 1980 and 1996. Indirect and induced positions would occur in a range of industries, with implications for industrial, office-commercial, and retail-commercial space. These impacts would affect demand for each of the land uses analyzed in this report.

**Potential Natural Gas Pipeline**

Northwest Natural is considering construction of a natural gas pipeline and distribution system in Coos County. ECONorthwest prepared an analysis of the potential economic impacts of the facility (ECONorthwest, 1997). The analysis anticipates the natural gas facility will have “significant, positive implications for the Coos County economy, its work force, and tax base.”

The pipeline construction project is estimated to result in $30.4 million spent on materials, labor, and land rights-of-way, of which approximately $11.5 million is estimated to go to residents and businesses in Coos County. The remainder will be spent on purchases from elsewhere ($2.0 million to residents and businesses elsewhere in Oregon, and $16.8 million to out-of-state businesses and workers). The significant portion of spending out-of-state is due to Coos County and Oregon not having all the resources needed for the specialized construction of the pipeline. However, using out-of-state labor can still have a positive impact on the local economy as workers spend a portion of their earnings in the local market.

Approximately 174 person-years of employment in Coos County would be created directly by construction spending. Nearly two-thirds of those jobs would be in the construction sector. Table 2-21 shows the estimated employment impacts of the pipeline construction project.
/table2-21

CONSTRUCTION IMPACTS OF A NATURAL GAS FACILITY IN COOS COUNTY

<table>
<thead>
<tr>
<th></th>
<th>Direct Impacts</th>
<th>Indirect Impacts</th>
<th>Induced Impacts</th>
<th>Total Impacts</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Jobs (person-years)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>in Coos County</td>
<td>174</td>
<td>17</td>
<td>89</td>
<td>280</td>
</tr>
<tr>
<td>Statewide</td>
<td>231</td>
<td>37</td>
<td>168</td>
<td>436</td>
</tr>
<tr>
<td>Total Income *</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>in Coos County</td>
<td>$5,377,300</td>
<td>$666,500</td>
<td>$2,751,000</td>
<td>$8,795,100</td>
</tr>
<tr>
<td>Statewide</td>
<td>$7,721,200</td>
<td>$1,679,000</td>
<td>$5,482,500</td>
<td>$14,887,300</td>
</tr>
</tbody>
</table>

*Total Income comprises personal and business income.

Source: ECONorthwest

Construction is estimated to produce a total of 280 jobs, $6.0 million in personal income, and $2.8 million in business income in Coos County. Total state impacts include an estimated 436 jobs, $10.2 million in personal income, and $4.7 million in business income.

Additional economic impacts would occur with the building of the local gas distribution system and with the operation and maintenance of the system and pipeline. The direct effects of first-year spending on the distribution system and operation and maintenance are presented in Table 2-22.

/table2-22

DIRECT IMPACTS OF FIRST-YEAR SPENDING ON CONSTRUCTION OF DISTRIBUTION SYSTEM AND OPERATION AND MAINTENANCE (1997 DOLLARS)

<table>
<thead>
<tr>
<th></th>
<th>Distribution System Construction</th>
<th>Operation and Maintenance</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Total Income* (person-years)</td>
<td>Total Income* (person-years)</td>
</tr>
<tr>
<td>Coos County</td>
<td>$1,280,200</td>
<td>$217,800</td>
</tr>
<tr>
<td>Statewide</td>
<td>$1,704,800</td>
<td>NA</td>
</tr>
</tbody>
</table>

*Total Income comprises personal and business income.

Source: ECONorthwest

The direct effects of first-year spending would be concentrated in the construction sector, and most of the effects would occur in Coos County. Eighty percent of the direct employment and 75 percent of the direct income is expected to accrue to Coos County. Direct effects of first-year spending (for construction and operation and maintenance) are estimated to be 44 jobs, $1,122,100 in personal income, and $375,900 in business income in Coos County. Total state direct impacts (available for construction only) are estimated at 46 jobs, $1,269,600 in personal income, and $435,200 in business income.

As opposed to the construction impacts of the natural gas pipeline, the impacts associated with construction of the distribution system and operation and maintenance of the main pipeline and distribution system would be longer-term, representing an annual stream of spending spread over twenty...
years or so. Table 2-23 summarizes the effect of spending on the pipeline and distribution system from 1998 to 2018. Also shown in Table 2-23 are total long-term impacts related to industrial expansion or relocation to Coos County and impacts resulting from spending of energy cost savings.

**TABLE 2-23**

**TOTAL LONG-TERM ECONOMIC IMPACTS OF NATURAL GAS PIPELINE (1997 DOLLARS)**

<table>
<thead>
<tr>
<th>Year</th>
<th>Distribution System Construction; O&amp;M</th>
<th>Industrial Expansion or Relocation</th>
<th>Spending of Energy Cost Savings</th>
<th>Total Long-Term Impacts</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Total Income</td>
<td>Jobs</td>
<td>Total Income</td>
<td>Jobs</td>
</tr>
<tr>
<td>1998</td>
<td>$2,028,300</td>
<td>60</td>
<td>NA</td>
<td>NA</td>
</tr>
<tr>
<td>1999</td>
<td>$1,128,400</td>
<td>34</td>
<td>$12,000,000</td>
<td>290</td>
</tr>
<tr>
<td>2000</td>
<td>$772,100</td>
<td>21</td>
<td>$18,040,000</td>
<td>654</td>
</tr>
<tr>
<td>2001</td>
<td>$685,700</td>
<td>23</td>
<td>$34,580,000</td>
<td>812</td>
</tr>
<tr>
<td>2002</td>
<td>$420,000</td>
<td>21</td>
<td>$40,580,000</td>
<td>1,017</td>
</tr>
<tr>
<td>2003</td>
<td>$440,600</td>
<td>13</td>
<td>$42,060,000</td>
<td>1,017</td>
</tr>
<tr>
<td>2004</td>
<td>$421,700</td>
<td>13</td>
<td>$44,780,000</td>
<td>1,083</td>
</tr>
<tr>
<td>2005</td>
<td>$430,400</td>
<td>13</td>
<td>$47,500,000</td>
<td>1,148</td>
</tr>
<tr>
<td>2006</td>
<td>$439,100</td>
<td>13</td>
<td>$50,210,000</td>
<td>1,214</td>
</tr>
<tr>
<td>2007</td>
<td>$447,800</td>
<td>14</td>
<td>$52,930,000</td>
<td>1,280</td>
</tr>
<tr>
<td>2008</td>
<td>$539,200</td>
<td>16</td>
<td>$55,650,000</td>
<td>1,346</td>
</tr>
<tr>
<td>2009</td>
<td>$465,000</td>
<td>14</td>
<td>$58,300,000</td>
<td>1,409</td>
</tr>
<tr>
<td>2010</td>
<td>$473,500</td>
<td>14</td>
<td>$61,000,000</td>
<td>1,475</td>
</tr>
<tr>
<td>2011</td>
<td>$482,100</td>
<td>15</td>
<td>$63,720,000</td>
<td>1,541</td>
</tr>
<tr>
<td>2012</td>
<td>$490,700</td>
<td>15</td>
<td>$66,450,000</td>
<td>1,607</td>
</tr>
<tr>
<td>2013</td>
<td>$571,400</td>
<td>17</td>
<td>$69,170,000</td>
<td>1,673</td>
</tr>
<tr>
<td>2014</td>
<td>$499,700</td>
<td>15</td>
<td>$70,370,000</td>
<td>1,702</td>
</tr>
<tr>
<td>2015</td>
<td>$500,300</td>
<td>15</td>
<td>$71,580,000</td>
<td>1,731</td>
</tr>
<tr>
<td>2016</td>
<td>$500,800</td>
<td>15</td>
<td>$72,710,000</td>
<td>1,758</td>
</tr>
<tr>
<td>2017</td>
<td>$501,400</td>
<td>15</td>
<td>$73,920,000</td>
<td>1,787</td>
</tr>
<tr>
<td>2018</td>
<td>$501,900</td>
<td>15</td>
<td>$75,130,000</td>
<td>1,817</td>
</tr>
<tr>
<td>Totals</td>
<td>$12,740,100</td>
<td>385</td>
<td>$1,067,130,000</td>
<td>25,804</td>
</tr>
</tbody>
</table>

Total Income comprises personal and business income. Jobs = person-years of employment.

Source: ECONorthwest

In total, the impacts from construction of the distribution system and operation and maintenance amount to $9.1 million in additional personal income and $3.7 million in additional business income in Coos County. The employment impacts amount to almost 385 person-years of employment over 20 years.

Currently, manufacturers in Coos County cannot get natural gas service and use higher-cost oil and propane instead. Availability of natural gas would benefit existing industries and would serve to attract new manufacturers to the region. Existing businesses would also expand as they find that having clean, lower-cost natural gas makes it economical to expand and hire new workers. As indicated in Table 2-23, the long-term impacts of expansion or relocation of manufacturing industries to the region include total income of over $1 billion ([$783 million in personal income and $284 million in business income]) and approximately 25,800 person-years of employment.
Table 2-23 also shows impacts that would result from spending associated with energy cost savings. Such savings occur as households and businesses substitute natural gas for other, more expensive fuel sources. The savings would be spent on other goods and services in the region, resulting in additional income and jobs. The total impacts are estimated at over $11 million in personal income, over $6 million in business income, and approximately 641 person-years of employment.

Addition of a natural gas pipeline and distribution system in the Coos Bay region would have significant economic impacts, particularly as industries expand or relocate to the area. Impacts would occur in a range of industries, affecting the need for industrial, office-commercial, and retail-commercial space, as well as the need for land zoned for industrial, commercial, and residential uses.

Space Implications of Additional Industrial Growth Potential

Carrying the possibility of a steel mill and natural gas pipeline through the analysis, potential job growth for Coos and Curry Counties is shown in Table 2-24.

<table>
<thead>
<tr>
<th>TABLE 2-24</th>
</tr>
</thead>
<tbody>
<tr>
<td>POTENTIAL JOB GROWTH, 1996 TO 2006</td>
</tr>
<tr>
<td>COOS AND CURRY COUNTIES</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Industry</th>
<th>1996</th>
<th>2006</th>
<th>Change</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Construction &amp; Mining</td>
<td>1,100</td>
<td>1,306</td>
<td>206</td>
<td>18.7%</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>3,840</td>
<td>4,544</td>
<td>704</td>
<td>18.3%</td>
</tr>
<tr>
<td>TPU</td>
<td>1,720</td>
<td>1,830</td>
<td>110</td>
<td>6.4%</td>
</tr>
<tr>
<td>Wholesale Trade</td>
<td>900</td>
<td>1,059</td>
<td>159</td>
<td>17.4%</td>
</tr>
<tr>
<td>Retail Trade</td>
<td>6,130</td>
<td>7,207</td>
<td>1,077</td>
<td>17.6%</td>
</tr>
<tr>
<td>FIRE</td>
<td>1,130</td>
<td>1,347</td>
<td>217</td>
<td>19.2%</td>
</tr>
<tr>
<td>Services</td>
<td>5,570</td>
<td>7,526</td>
<td>1,956</td>
<td>35.1%</td>
</tr>
<tr>
<td>Government</td>
<td>7,060</td>
<td>7,608</td>
<td>548</td>
<td>7.8%</td>
</tr>
<tr>
<td>Total Nonagr. Employment</td>
<td>27,450</td>
<td>32,427</td>
<td>4,977</td>
<td>18.1%</td>
</tr>
</tbody>
</table>

TPU: Transportation, Communications, and Public Utilities.
FIRE: Finance, Insurance, and Real Estate.

Source: State of Oregon Employment Department.

The potential entry of a steel mill and natural gas pipeline would bring an estimated additional 1,777 direct, indirect, and induced jobs between 1996 and year 2006, an 18 percent increase over the number of jobs in 1996. These projects would create positive job growth in all industry sectors.

Applying the estimated employment impacts of the projects into the long-term, estimated employment and resulting industry mix are shown in Table 2-16.
TABLE 2-25
POTENTIAL JOB GROWTH, 2006 TO 2020
COOS AND CURRY COUNTIES

<table>
<thead>
<tr>
<th>Industry</th>
<th>2006</th>
<th>2020</th>
<th>Change</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Construction &amp; Mining</td>
<td>1,306</td>
<td>1,417</td>
<td>111</td>
<td>8.5%</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>4,544</td>
<td>4,523</td>
<td>(21)</td>
<td>(0.5%)</td>
</tr>
<tr>
<td>TPU</td>
<td>1,830</td>
<td>1,813</td>
<td>(17)</td>
<td>(0.9%)</td>
</tr>
<tr>
<td>Wholesale Trade</td>
<td>1,059</td>
<td>1,125</td>
<td>66</td>
<td>6.2%</td>
</tr>
<tr>
<td>Retail Trade</td>
<td>7,207</td>
<td>7,881</td>
<td>674</td>
<td>9.4%</td>
</tr>
<tr>
<td>FIRE</td>
<td>1,347</td>
<td>1,430</td>
<td>83</td>
<td>6.2%</td>
</tr>
<tr>
<td>Services</td>
<td>7,526</td>
<td>8,967</td>
<td>1,441</td>
<td>19.1%</td>
</tr>
<tr>
<td>Government</td>
<td>7,608</td>
<td>7,790</td>
<td>182</td>
<td>2.4%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>32,427</td>
<td>34,946</td>
<td>2,519</td>
<td>7.8%</td>
</tr>
</tbody>
</table>

TPU: Transportation, Communications, and Public Utilities.
FIRE: Finance, Insurance, and Real Estate.

Again, the projects would create significant employment in all sectors, with the largest impacts in manufacturing. Applying the occupational distributions and space needs to the analysis, employment growth is expected to create a net demand of nearly 900,000 square feet of industrial space between 1996 and 2006, and a long-term need of nearly 1.2 million square feet by year 2020, as shown in Table 2-18.

TABLE 2-26
POTENTIAL DEMAND FOR INDUSTRIAL SPACE, 1996 TO 2020
COOS AND CURRY COUNTIES

<table>
<thead>
<tr>
<th>Industry</th>
<th>1996-2006</th>
<th>2006-2020</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Net Increase (Decrease) in Industrial Workers</td>
<td>Net New Demand (Square Feet)</td>
</tr>
<tr>
<td>Manufacture</td>
<td>750</td>
<td>489</td>
</tr>
<tr>
<td>TPU</td>
<td>1,000</td>
<td>65</td>
</tr>
<tr>
<td>Wholesale Trade</td>
<td>1,100</td>
<td>70</td>
</tr>
<tr>
<td>Retail Trade</td>
<td>2,500</td>
<td>123</td>
</tr>
<tr>
<td>FIRE</td>
<td>350</td>
<td>8</td>
</tr>
<tr>
<td>Services</td>
<td>350</td>
<td>149</td>
</tr>
<tr>
<td>Government</td>
<td>350</td>
<td>65</td>
</tr>
<tr>
<td><strong>Total All Industries</strong></td>
<td>969</td>
<td>889,950</td>
</tr>
<tr>
<td><strong>Total Long-Term Increase in Industrial Space</strong></td>
<td>1,164,000</td>
<td></td>
</tr>
</tbody>
</table>

TPU: Transportation, Communications, and Public Utilities.
FIRE: Finance, Insurance, and Real Estate.

Applying the occupational distribution of managerial, professional, and clerical employees to the projected employment levels, it is expected that new employment will generate a net demand for over...
600,000 square feet of office space between 1996 and 2006, and long-term need for nearly 1 million square feet of office space by year 2020, as shown in Table 2-19.

TABLE 2-27
POTENTIAL DEMAND FOR OFFICE SPACE, 1996 TO 2020
COOS AND CURRY COUNTIES

<table>
<thead>
<tr>
<th>Industry</th>
<th>1996-2006</th>
<th>2006-2020</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Net Increase (Decrease) in Office Workers (Square Feet)</td>
<td>Net New Demand</td>
</tr>
<tr>
<td>Const &amp; Mining</td>
<td>300</td>
<td>50</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>300</td>
<td>90</td>
</tr>
<tr>
<td>TPU</td>
<td>300</td>
<td>42</td>
</tr>
<tr>
<td>Wholesale Trade</td>
<td>300</td>
<td>86</td>
</tr>
<tr>
<td>Retail Trade</td>
<td>300</td>
<td>151</td>
</tr>
<tr>
<td>FIRE</td>
<td>300</td>
<td>202</td>
</tr>
<tr>
<td>Services</td>
<td>300</td>
<td>1,207</td>
</tr>
<tr>
<td>Government</td>
<td>250</td>
<td>336</td>
</tr>
<tr>
<td><strong>Total All Industries</strong></td>
<td>2,165</td>
<td>632,400</td>
</tr>
</tbody>
</table>

**Total Long-Term Increase in Office Space**: 954,300

TPU: Transportation, Communications, and Public Utilities.
FIRE: Finance, Insurance, and Real Estate.

These estimated space requirements are based on current employment projections by the Employment Department and OEA, as well as potential entry of a steel mill as estimated by OEDD and a natural gasline by ECONorthwest. As the baseline estimates, they are intended to provide a representation of the magnitude of space demand, not a prediction of future building.

Retail-Commercial Analysis

The amount of retail-commercial space required to serve a population is driven primarily by the population’s income and spending patterns. Other factors affecting overall demand for retail space include sales to visitors and other businesses (i.e., office supplies and building materials). Based on the type of merchandise they offer, retail establishments require sales of a certain dollar amount per square foot to operate successfully. When a population’s purchasing ability increases (either through population growth, rising incomes, fewer payment obligations, or other reasons), their ability to sustain additional retail space also increases.

Definition of the Trade Areas

The trade area for retail depends on the location of potential buyers, their travel patterns, their links to the site, and proximity of existing space to satisfy market demand. Retail trade areas are defined by distance, driving time, and the type of goods offered. For example, the trade area is much smaller for a neighborhood center offering convenience and day-to-day goods than for a regional shopping center with an extensive variety of general merchandise, services, and recreational facilities. The trade areas are affected by the availability (or lack of availability outside the Cities of Coos Bay and North Bend) of retail facilities to meet consumer demand. The lack of retail facilities beyond the Urban Growth...
Boundary (UGB) requires people living in the surrounding rural areas to travel longer distances to meet their retail needs.

Working with the Bay Area Chamber of Commerce, DEA and Shoji Planning and Development identified three retail trade areas which apply to the Bay Area:

1) **The primary trade area**: the geographic area from which residents will be the primary audience for convenience retail goods. A small trade area defined primarily by the distance and driving time to convenience retail areas, it is generally the households of the Cities of Coos Bay and North Bend and the community of Charleston. Because of the lack of retail facilities outside the UGB, however, this trade area extends approximately 10 miles to the north and south—up to, but not including, Lakeside, whose residents are served by a variety of local retailers.

2) **The secondary trade area**: the geographic area from which residents make up the primary audience for comparison retail goods. This trade area is significantly larger than the primary trade area for convenience goods. To effectively evaluate public need for land zoned for various uses in the County, this trade area is defined as Coos County.

3) **The tertiary trade area**: the overall effective trade area for the Bay Area. As indicated in the Comprehensive Plans of the Coos Bay and North Bend, the Bay Area has served as a significant center of commerce and activity for the south coast. Since these Comprehensive Plans were adopted, the Bay Area has continued to fill this role for the area, with its economic influence reaching north to Florence and south to include Brookings.

In order to estimate the number of persons and households in the secondary trade area, DEA used official state estimates from PSU CPRC and forecasts prepared by OEA. For the primary and tertiary trade areas, DEA used Census tracts and block groups to approximate the geographic boundaries of each trade area, applying growth rates as estimated by PSU CPRC and forecasted by OEA.

**Populations of the Trade Areas**

The primary trade area is estimated to contain a 1996 population of nearly 41,000 people in over 16,500 households. Based on Census Tracts 1 (less Block Group 1, since Lakeside residents are generally served by a variety of local retailers), 2 through 8, and 7.99, this trade area is expected to house over 43,500 persons in over 18,000 households in year 2005, and over 47,000 people in over 20,000 households in year 2020.

Defined as Coos County, the secondary trade area is estimated to contain 61,700 people in approximately 25,500 households. Although the population of the County has declined since 1980, OEA forecasts annual growth of just under one-half percent, yielding a population of nearly 65,000 persons by year 2005, and 69,500 people by year 2020.

The tertiary trade area is estimated to contain nearly 98,000 people in over 40,000 households, based on the official PSU CPRC estimates for July 1, 1996. This trade area is defined as the entirety of Coos County, the three westernmost Census tracts in Lane County (Tracts 7.03, 7.04, and 7.98), the two
westernmost Census tracts in Douglas County (Tracts 100.98 and 200.98), and three northernmost Census tracts in Curry County (Tracts 9501, 9502, and 9503). It is estimated to grow to nearly 107,000 persons in over 45,000 households in 2005, reaching over 119,000 persons in nearly 52,000 households by year 2020. The population and household estimates of the three trade areas are shown in Table 2-28.

TABLE 2-28
ESTIMATED POPULATIONS AND HOUSEHOLDS, RETAIL TRADE AREAS

<table>
<thead>
<tr>
<th>Primary Trade Area</th>
<th>Secondary Trade Area</th>
<th>Effective Trade Area</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Persons</strong></td>
<td><strong>HHs</strong></td>
<td><strong>Persons</strong></td>
</tr>
<tr>
<td>1990</td>
<td>39,761</td>
<td>15,903</td>
</tr>
<tr>
<td>1996</td>
<td>60,273</td>
<td>24,193</td>
</tr>
<tr>
<td>2005</td>
<td>92,908</td>
<td>38,076</td>
</tr>
</tbody>
</table>

Analysis of public need for retail-commercial space is an important part of periodic planning efforts, to ensure that adequate and appropriate lands are designated for retail development. Lack of appropriately designated lands will hinder retail development, creating artificial monopolies. Because the purpose of this analysis is to evaluate local jurisdictions’ need for lands zoned to accommodate various uses, the focus of this analysis will be on the economic need within the Coos County, or the county-wide (secondary) trade area.

**Spending in Coos County**

Retail spending in the Bay Area is strong, with aggregate annual retail spending in Coos County totaling over $550 million in 1996, including over $108 million spent at grocery and other food stores, $48 million at eating and drinking establishments, over $90 million in general merchandise categories, and $19 million in household equipment and furniture.

Households in the trade area spend an estimated average of approximately $14,000 annually in various retail categories including food at home, food away from home, personal care products, household equipment, and apparel. In addition, total retail spending includes sales to visitors and sales to other businesses (e.g. lumber and building products, office supplies). In 1996, retail sales to other businesses accounted for approximately one-third of all non-visitor retail sales in Coos County.

According to the Urban Land Institute’s Dollars and Cents of Shopping Centers (1997 edition), commercial space in the western United States produces an annual median sales volume of $212 per square foot of gross leasable area. Based on the median sales volumes required by each type of commercial operation, retail spending in Coos County will currently support more than 3 million square feet of retail commercial space in Coos County as shown in Table 2-29.
TABLE 2-29
ANNUAL RETAIL SPENDING IN COOS COUNTY, 1996

<table>
<thead>
<tr>
<th></th>
<th>*Residents' Spending</th>
<th>Visitor Aggregate Spending</th>
<th>Median Sales per Supportable Square Foot</th>
<th>Median Sales per Supportable Square Feet</th>
</tr>
</thead>
<tbody>
<tr>
<td>Food</td>
<td>$99,301</td>
<td>$9,280</td>
<td>$108,581</td>
<td>$320</td>
</tr>
<tr>
<td>Eating and Drinking</td>
<td>$28,530</td>
<td>$19,750</td>
<td>$48,280</td>
<td>$180</td>
</tr>
<tr>
<td>Retail Sales</td>
<td>$73,606</td>
<td>$17,270</td>
<td>$90,876</td>
<td>$190</td>
</tr>
<tr>
<td>Household Equipment</td>
<td>$18,726</td>
<td>N/A</td>
<td>$18,726</td>
<td>$140</td>
</tr>
<tr>
<td>Automotive</td>
<td>$137,263</td>
<td>$12,740</td>
<td>$150,003</td>
<td>$130</td>
</tr>
<tr>
<td>Other Categories</td>
<td>$126,188</td>
<td>$8,400</td>
<td>$134,588</td>
<td>$190</td>
</tr>
<tr>
<td>Total</td>
<td>$483,614</td>
<td>$67,440</td>
<td>$551,054</td>
<td>3,081,817</td>
</tr>
</tbody>
</table>

* Includes sales by establishments which may sell more to businesses than consumers, such as lumber yards, glass companies, and office supply stores.

Sources: Sales & Marketing Management (Total Aggregate Spending); Oregon Tourism Commission and Dean Runyan and Associates (Visitor Spending); Claritas, Inc. (Residents' Spending); and The Urban Land Institute (Median Sales per Square Foot).

The anticipated growth in population and households will result in increases in consumer spending. Changes in household composition have had some impacts on consumer spending patterns. For example, declining household size is generally a result of fewer dependents per household. With fewer dependents and stable household income, householders find they have increased disposable income and increased opportunities for retail spending.

Retail Space Needs Analysis

Based on population forecasts prepared by OEA and consumer spending patterns for the county, the population of Coos County will require an additional 260,000 square feet of retail space by year 2005, and over 500,000 additional square feet of retail space by year 2020 as shown in Table 2-30.

TABLE 2-30
RETAIL MARKET ANALYSIS, 1996 TO 2020
COOS COUNTY

<table>
<thead>
<tr>
<th></th>
<th>Median Sales per Square Foot</th>
<th>Aggregate Spending</th>
<th>Supportable Square Feet</th>
<th>Aggregate Spending</th>
<th>Supportable Square Feet</th>
<th>Aggregate Spending</th>
<th>Supportable Square Feet</th>
<th>Aggregate Spending</th>
<th>Supportable Square Feet</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eating and Drinking</td>
<td>$180</td>
<td>$48,280</td>
<td>268,222</td>
<td>$52,385</td>
<td>291,030</td>
<td>$57,216</td>
<td>317,867</td>
<td>$57,216</td>
<td>317,867</td>
</tr>
<tr>
<td>Retail Sales</td>
<td>$190</td>
<td>$90,876</td>
<td>478,295</td>
<td>$98,603</td>
<td>518,966</td>
<td>$107,696</td>
<td>566,821</td>
<td>$107,696</td>
<td>566,821</td>
</tr>
<tr>
<td>Household Equipment</td>
<td>$140</td>
<td>$18,726</td>
<td>133,757</td>
<td>$20,318</td>
<td>145,131</td>
<td>$22,192</td>
<td>158,514</td>
<td>$22,192</td>
<td>158,514</td>
</tr>
<tr>
<td>Automotive</td>
<td>$130</td>
<td>$150,003</td>
<td>1,153,869</td>
<td>$162,758</td>
<td>1,251,986</td>
<td>$177,767</td>
<td>1,367,436</td>
<td>$177,767</td>
<td>1,367,436</td>
</tr>
<tr>
<td>Other Categories</td>
<td>$190</td>
<td>$134,588</td>
<td>708,358</td>
<td>$146,032</td>
<td>768,592</td>
<td>$159,499</td>
<td>839,466</td>
<td>$159,499</td>
<td>839,466</td>
</tr>
<tr>
<td>Total</td>
<td>$551,054</td>
<td>3,081,817</td>
<td>$597,912</td>
<td>3,343,873</td>
<td>$653,047</td>
<td>3,652,224</td>
<td>3,652,224</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Increase in Retail Space Required

<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>262,056</td>
<td>308,351</td>
</tr>
</tbody>
</table>

Total Increase in Retail Space Required (1996-2020)

| 570,407 |

Bay Area Comprehensive Economic Analysis
April 30, 1998
The additional retail space required to serve the residents of the Bay Area should be a mix of convenience retail, retail service, and regional shopping space. In analyzing differences in space requirements by trade area, the type of retail-commercial space can be inferred. The space requirements linked to the primary trade area can generally be classified as convenience commercial, since the area was defined using this criteria. The difference between the space required for the effective trade area and the primary trade area will generally be for regional shopping space (in larger shopping centers with extensive variety and selection of merchandise), since the more distant shoppers are not likely to purchase a large proportion of their convenience items in the Bay Area.

A comparison of the retail market analyses for each of the three trade areas shows that the Bay Area will require an additional 200,000 square feet of convenience retail space by year 2005 and nearly 440,000 square feet by year 2020. The increase in regional shopping space will total over 400,000 square feet by year 2005, reaching nearly 1 million square feet of shopping center space by year 2020. This analysis is summarized in Table 2-31.

| TABLE 2-31 | INCREASE IN DEMAND FOR RETAIL-COMMERCIAL SPACE, 1996 TO 2020 |
| BAY AREA | | |
| 1996-2005 | 2005-2020 | Total |
| Primary Trade Area | 200,000 | 237,000 | 437,000 |
| Secondary Trade Area | 262,000 | 308,000 | 570,000 |
| Tertiary Trade Area | 619,000 | 783,000 | 1,402,000 |
| Total Convenience Retail | 200,000 | 237,000 | 437,000 |
| Total Regional Shopping Space | 419,000 | 546,000 | 965,000 |

Based on forecast population growth, increased buying power will require development of additional retail facilities for both convenience shopping and regional shopping needs. Without new or expanded retail facilities, shoppers will seek better prices and selection elsewhere. There is a potential for retailers who can take advantage of the concentration of existing merchandisers in the Bay Area to draw shoppers and build on the loyalties of the Bay Area. Examples of Bay Area shopping centers contributing to the draw of the area include the 350,000-square-foot Pony Village Mall, an estimated 450,000 square feet of commercial shopping space in downtown Coos Bay, an estimated 280,000 square feet in downtown North Bend, and other existing retail space.

Similar to the industrial and office-commercial space requirements, these calculations are based on current development and consumer buying patterns. Buying patterns (i.e., the proportion of goods sold through mail-order and other non-retail methods) or development patterns (retailers using new highly-efficient ways of storing, distributing, or displaying merchandise) may be subject to change. Additionally, some increases in retail space may occur in space already available but currently vacant or otherwise underutilized.

Implications for density and the amount of land designated for retail-commercial uses are discussed in a separate technical memorandum, Regional Site Availability, and will be further discussed in Phase II, Regional Land Needs Projections.
CONCLUSIONS

Despite little change in net population, Coos County has experienced some significant changes in its economy since 1980. Some of the changes include:

- Decline in household size;
- Increase in proportion of older persons;
- Decline in the manufacturing sector and the resulting loss of high-paying manufacturing jobs; and
- Growth in trade, services, and government sectors.

These shifts indicate the general trend of the region’s economy away from a resource- and manufacturing-based economy to one with growing retail and service sectors.

Population and employment growth is expected for Coos County, increasing demand for housing. An additional 4,700 households are expected in Coos County by year 2020, with approximately 2,300 of them residing in the core Bay Area, represented generally by the Cities of Coos Bay and North Bend. In addition to increased urbanization, other factors will affect the type of housing appropriate to serve these new households. These factors include household size and household income, two factors which suggest a tendency toward attached housing and other forms of higher-density housing product.

The Bay Area economy comprises a number of key industries, including an active visitor industry, a major fishing and seafood-processing center in Charleston Harbor, the wood products industry, and the Bay’s shipping industry enhanced by its deep-draft navigation channel. Shifts in employment are expected to continue, but the shift is expected to slow with the industry mix stabilizing somewhat. A growing economy requires new construction and development, with growth expected in the construction sector.

Development patterns appear positive due to changes in land and real estate markets, fiscal and policy environments, and national and international economic conditions. Two examples include the potential entry of a steel mill and the potential development of a natural gas pipeline in the Bay Area. The steel mill is currently considering three possible locations, including Coos County. With a direct impact of 250 manufacturing jobs at full buildout, development of a steel mill would serve to slow the loss of manufacturing-sector employment in the county. In the long term, a steel mill would have direct, indirect, and induced impacts estimated as an increase in 563 jobs and 283 persons to the county, and 313 jobs and 565 persons statewide.

Based on the best information currently available, this analysis suggests the Bay Area is on the verge of a revitalization. Increases in population and employment are expected in Coos County, with a resulting need for new development of all kinds: housing, office-commercial space, industrial space, and retail-commercial space. New development will require appropriately designated lands and development standards.
CHAPTER 3: PLAN AND POLICY REVIEW

INTRODUCTION
This chapter presents the results of a review of state and local plans and policies related to land use and development in the Bay Area. This memorandum identifies conflicts between the existing plans and policies and the local jurisdictions' objectives for future economic development, as articulated by the steering committee for this study, and as presented in Vision 2006: A Ten-Year Economic Development Vision for Oregon's Bay Area, produced by the Greater Bay Area Partnership in June 1996. In addition to the plan and policy reviews performed by staff at David Evans and Associates, Inc. and Shoji Planning and Development, interviews with several steering committee members, local officials, and property owners were conducted to help identify potential conflicts between existing policies and economic objectives.

Within this memorandum, each relevant policy document is separately addressed, identifying its relationship to the region's economic development and specifying policies that may interfere with the region's economic goals. Findings of the plan and policy review are summarized, as appropriate.

VISION 2006: A TEN-YEAR ECONOMIC DEVELOPMENT VISION FOR OREGON'S BAY AREA, JUNE 27, 1996

Vision 2006 identifies the common goals, objectives, strategies, and policies for economic development in the greater Bay Area. The document was drafted by the Greater Bay Area Partnership, a task force organized by the Bay Area Economic Development Council (BAEDC), in June 1996. The Partnership team included representatives from the City of North Bend, City of Coos Bay, Oregon International Port of Coos Bay, Southwestern Oregon Community College, CCD Business Development Corporation, Bay Area Chamber of Commerce, Coos Bay/North Bend Promotions Committee, and Pacific Power.

Vision 2006 has not been through a public process and is not a formally adopted plan. However, the document is a compilation of adopted goals and policies of the local jurisdictions. It was compiled in an effort to coordinate economic development efforts throughout the Bay Area and can be considered to be a representation of the region's economic development vision.

The Vision 2006 document begins with a vision statement that summarizes how the Greater Bay Area Partnership sees the region by 2006. The vision includes a strong and diverse economy, a strong, locally-controlled education system that trains skilled workers, a healthy environment and high quality of life, increased marine business and tourism, and a well-planned and adequate infrastructure. The vision statement forms the basis for several specific goals related to business development, workforce development, infrastructure, commercial districts, the Oregon International Port of Coos Bay, transportation, and quality of life. The goals are supported by strategies, which in turn are implemented through several action items.
Relationship to Economic Development of the Bay Area

The BAEDC recognized that having a common plan for future economic development would benefit the Bay Area communities by providing better access to grant funds that require a community-wide strategic plan, such as the Rural Initiative Fund, CCD Business/Industrial Recruitment Plan, USDA Forest Service grants, and US Department of Commerce Economic Development Administration. Developing a common plan was also seen as a way to reveal areas of conflict or agreement in the local community plans that could affect economic development. Consequently, the process of preparing Vision 2006 and developing a regional economic vision helped resolve potential conflicts between communities and to focus their collective attention on diversifying and strengthening the regional economy.

The most direct relationship between Vision 2006 and economic development is in the Action items. They include: working with local authorities to prepare sites for immediate industrial and commercial development; preparing a database of developable sites; organizing a business recruitment campaign and team; seeking sources of funding for development; supporting efforts to attract diverse types of industry and business; assessing training needs of existing and emerging small businesses; supporting the appropriate expansion of existing infrastructure and utility service; pursuing navigation and channel improvements in the Port District; and improving rail accessibility. These are just a few of the nearly 60 Action items listed in Vision 2006 designed to encourage and diversify economic development.

Analysis

The strategies presented below come from several sources, which were compiled and clarified in Vision 2006. Only those strategies most directly related to the Economic Analysis of the Bay Area are included in this section.

**Business Development**

- Promote the continued development and expansion of the existing commercial base of the Bay Area which consists of a wide range of businesses in the retail, manufacturing, service and professional sectors.
- Support efforts for greater economic diversification of the Bay Area while continuing to promote employment and development within its three key industries: wood products, tourism, and fisheries.
- Support efforts to significantly increase development in the area's business and industrial lands.

**Infrastructure**

- Increase area water and wastewater capacity.
- Support efforts to increase other infrastructure capacity for future economic development (e.g., a need for additional electrical capacity has been recognized recently).
- Support development of a natural gas pipeline.

**Commercial Districts Development**

- Support plans of urban renewal agencies designed to stimulate development of industry and encourage rehabilitation and redevelopment consistent with comprehensive plan and land development regulations.
• Provide waterfront public open space that capitalizes on the district's waterfront location and facilities.
• Develop or redevelop vacant and underutilized property.

**Oregon International Port of Coos Bay**
• Promote cargo diversification and greater utilization of the region's maritime capacity to help retain and expand family-wage jobs throughout the Bay Area communities.
• Continue development of North Bay Marine Industrial Park infrastructure and seek viable partnerships for establishing industrial operations throughout the area.
• Support the commercial seafood industry and facilitate increased recreational tourism in the Bay Area through ongoing improvements to infrastructure and facilities in the Charleston Marina complex.

**Transportation**
• Support efforts to ensure appropriate commercial air transport facilities and air services with improved schedules, fares, and routes.
• Reduce highway travel time to and from the Bay Area and improve safety along these routes.
• Promote suitable and sustainable truck and rail freight service serving the Bay Area.

**Tourism**
• Diversify the marketing tools for promotion of the visitor products in the Bay Area that will build an image of the area as a year-round visitor destination.
• Support development and maintenance of tourism-related businesses, parks and downtown areas into user-friendly destinations.

**Quality of Life**
• Support development and recruitment of cultural facilities and activities to the area.

Most of the regional goals and strategies provide sound guidance for economic development of the Bay Area. However, some of the strategies for commercial districts development relate to Coos Bay's and North Bend's urban renewal plans. The Department of Land Conservation and Development (DLCD) has indicated that portions of local urban renewal plans are inconsistent with local comprehensive plans and the land development ordinance. (See discussions of those plans in this memorandum.) The discrepancies must be addressed and rectified before the strategies can be implemented.

**COOS COUNTY COMPREHENSIVE PLAN, 1985, VOLUME 1, PART 1**
Volume 1, Part 1, of the Coos County Comprehensive Plan outlines the goals and strategies of the plan and provides background regarding the process of drafting the Plan. The Plan includes less than two pages of revisions since its adoption. None of the revisions relate directly to economic development of the Bay Area.
Relationship to Economic Development of the Bay Area

The goals and policies most directly related to economic development include:

5.14 Ocean Resources
5.16 Industrial and Commercial Lands
5.18 Public Facilities and Services
5.19 Transportation
5.22 Urbanization

None of the strategies outlined in the Coos County Comprehensive Plan conflict with economic
development of the Bay Area and region's economic vision. However, several goals within the
Comprehensive Plan include strategies directly related to the region's economic development strategies.
Further analysis may be necessary to determine the extent to which these strategies have been
implemented. Limited implementation of Comprehensive Plan strategies could limit the ability to realize
the region's economic goals.

Analysis

The Comprehensive Plan strategies that may limit economic development in the region are summarized
in this section. The numbers (e.g., 5.14) correspond to sections in the Comprehensive Plan.

Ocean Resources (section 5.14)

Strategy 1 - Promote development of underutilized fish species. This strategy does not address land
use issues; however, this economic development strategy may merit further attention.

Industrial and Commercial Lands (section 5.16)

The following issues were identified as impediments to economic development in Coos County when the
plan was adopted:

• dependency on resource-based employment;
• poor transportation systems; which affects shipping, tourism, etc.
• rugged topography, which physically constrains development;
• isolated location;
• land-banking by large companies, which effectively removes property from potential development;
and
• "trade drain" with local income being spent outside the county.

Many of the issues raised in the Coos County Comprehensive Plan remain as concerns related to the
region's economic development. Regional economic strategies, as identified in Vision 2006 for example,
call for diversifying the area's economic base and improving transportation systems.

Public Facilities and Services (section 5.18)

Strategy 1 - Encourages the Cities of North Bend and Coos Bay to develop capital improvement
programs to provide for services to their region. This strategy supports economic development in
unincorporated areas. Further research could reveal the extent to which this policy has been adopted and
implemented by North Bend and Coos Bay. The development and implementation of capital improvement plans that serve the region, rather than the cities alone, would provide public facilities and services in some unincorporated areas. Without adequate public facilities and services, commercial and industrial lands would likely remain underutilized.

Strategy 5 - Allows self-contained community and water systems for industrial users for developments of 10 or more parcels. This strategy may be beneficial for the development of industrial parks, but development of smaller industrial sites may be impeded if services are lacking. Increased costs of site development, resulting from the need to provide independent water systems, could hamper development in areas zoned for industrial uses. Further analysis of the level of water and wastewater services to industrially-zoned areas would determine whether availability of these services is an impediment to industrial development.

Regional economic development strategies indicate that insufficient public facilities and services in the Bay Area continue to present a challenge to economic development efforts.

Transportation (section 5.19)
Strategy 3 - Allows for the designation of special improvement districts to upgrade roads. A review of Measures 5 and 50 would clarify whether implementation of this strategy is currently possible. If it is not, it may be necessary to conduct further analysis of current funding strategies for improving roadways.

Regional transportation strategies for economic development indicate that structural improvements, safety improvements, reduced travel time, and improved traffic flow are needed on roads and highways serving the Bay Area.

Urbanization (section 5.22)
Strategy 1 - Periodically review the appropriateness of each city's urban growth boundary (UGB). There are currently clusters of residential, commercial, and industrial land in unincorporated areas that follow urban development patterns. These areas are not within the North Bend or Coos Bay UGBs. Some of these areas may have access to public facilities and services through special districts or through agreements with the cities, but others are not served by public facilities. Expansion of the UGB and development of appropriate Urban Growth Management Agreements may be one way to encourage economic development in these exception areas.

Coos County Comprehensive Plan, Volume II, Coos Bay Estuary Management Plan, March 1984
The Coos Bay Estuary Management Plan (CBEMP) provides the legal basis for land and water use decisions within the estuary and coastal shorelands of the Coos Bay Estuary. The CBEMP was the County's response to the state requirement that local jurisdictions plan the types of uses and activities that are permitted on Oregon's coast; cities and counties have direct responsibility for developing and implementing plans for areas lying within the estuary and its shorelands. The purpose of the CBEMP is to provide predictability in the issuance of local, state and federal permits by designating appropriate
areas for the location of various existing and future uses and activities. Through interagency development and public input, the CBEMP sought to create a balance between the often competing, if not conflicting, needs of development and conservation.

The CBEMP consists of policies and maps of the aquatic and shoreland management areas. The estuary and coastal shorelands were mapped and boundaries drawn around specific management segments. Each management segment has a classification, a two-letter designation such as CA (Conservation Aquatic) or UW (Urban Water-Dependent), which determines the general level of development allowed. There are nine general classifications. Each segment also has a management objective that forms the policy basis for the allowable uses and activities in the management segment. In addition, the CBEMP establishes 73 bay-wide policies that apply to management segments and take precedence over the site-specific use and activity policies.

Relationship to Economic Development of the Bay Area

In regulating development in the estuary and coastal shorelands of Coos Bay, the CBEMP directly affects the economy in two ways. The primary impact on economic development is in regulation of the type and location of new development. To the extent that the regulations encourage development, they can result in relatively more economic development. Conversely, if the regulations are too restrictive, they can hinder economic development.

A secondary impact is in the permitting process itself. If the process for obtaining development approval in areas appropriate for development is too difficult, lengthy, obscure, or unpredictable, the cost of development may outweigh the benefit, thereby resulting in less development than otherwise expected.

Summary of Plan Components

Definitions

Water-Dependent (WD). A use or activity which can be carried out only on, in, or adjacent to water areas because the use requires access to the water body for water-borne transportation, recreation, energy production, or source of water.

Water-Related (WR). Uses which are not directly dependent upon access to a water body, but which provide goods or services that are directly associated with water-dependent land or waterway use, and which, if not located adjacent to water, would result in a public loss of quality in the goods or services offered. Residences, parking lots, spoil and dump sites, roads and highways, restaurants, businesses, factories, and trailer parks are not considered to be water-dependent or water-related, unless they can be classified as necessary accessory uses to water-dependent or-related facilities or uses.

Bay-Wide Policies

There are 73 policies that are applied bay-wide and are mandatory. Site-specific management directives are subordinate to these policies. The following policies are relevant to economic development issues. (Coos County is in the process of updating the CBEMP, and some of the policy numbers may change.)
Estuary Classification (Policy 1). This policy classifies Coos Bay as a "Deep-Draft Development Estuary" consistent with the Oregon Estuary Classification (OAR 660-17-000). Allowed uses and activities must remain consistent with this classification. According to the CBEMP, commercial and industrial development is allowed outright in development areas, given that development is of "needed commercial and industrial water-dependent uses consistent with a shallow-draft estuary . . ." In development areas, uses are allowed that are "water-related and non-dependent, non-related uses not requiring fill," where it can be shown that such uses are consistent with the resource capabilities of the area and purposes of the CBEMP, pursuant to "Linkage" and "Goal Exception" findings in the CBEMP. These uses are also subject to special conditions and policies set forth elsewhere in the CBEMP.

General Schedule of Permitted Uses and General Use Priorities (Policy 2). Uses must be equal to or less intensive than uses and activities that are, or may be, allowed by LCDC Goal 16 and OAR 600-17-000. Priorities for development are set in order to: 1) ensure compatibility with Goal 16, and 2) maintain the integrity of the estuarine ecosystem.

Four general use priorities are given in order of importance:
- uses which maintain the integrity of the estuarine ecosystem;
- water-dependent uses requiring estuarine location;
- water-related uses which do not degrade or reduce the natural estuarine resources and values; and
- non-water-dependent, non-water-related uses which do not alter, reduce, or degrade the estuarine resources and values.

The lowest priority uses are non-dependent, non-related uses which do not alter, reduce or degrade the estuarine resources and values.

Resource Capability Consistency and Impact Assessment (Policy 4). Uses and activities which would alter or potentially alter the integrity of the estuarine ecosystem may be required to meet the resource capabilities test. The CBEMP has determined consistency with resource capabilities for many uses within the management segments. Where consistency needs to be demonstrated, a determination of consistency will be based upon the following:
- description of resources;
- evaluation of impacts of proposed use on those resources; and
- determination of whether proposed use is consistent with resource capabilities of management unit, or can be made consistent.

If an impact assessment requirement of LCDC Goal #16 has not been satisfied within the plan for certain uses, then those uses will be permitted only if findings demonstrate the public benefit would warrant modification or loss to the estuarine ecosystem. Such an assessment would include:
- type and extent of alterations expected;
- type of resource affected;
- expected extent of impacts on water quality and other physical characteristics of the estuary and its uses; and
- methods for avoiding or minimizing impacts.
Overall Use Priorities Within Coastal Shorelands (Policy 13). Six priorities are given for use of coastal shorelands listed from highest to lowest priority. Priorities four, five and six are:

4. "provide for non-dependent, non-related uses which retain flexibility of future use and do not prematurely or unalterably commit shorelands to more intensive uses;"

5. "provide for development, including non-dependent, non-related uses in urban areas compatible with existing or committed uses;"

6. "permit non-dependent, non-related uses which cause a permanent or long-term change in the features of coastal shorelands only upon a demonstration of public need."

General Policy on Uses Within Rural Coastal Shorelands (Policy 14). Policy restricts uses allowed in rural shoreland areas. The strategy is aimed at providing special consideration of rural coastlands and meeting requirements of LCDC Goal #17. Allowed uses include:

- farming;
- propagation and harvesting of forest products;
- water-dependent recreation developments;
- aquaculture;
- water-dependent commercial and industrial uses and water-related uses only upon findings that uses satisfy a need which cannot otherwise be accommodated on urban and urbanizable shorelands;
- residential uses (with limitations); and
- water-dependent commercial or industrial uses determined to satisfy a need which cannot be accommodated at other upland or urban/urbanizable locations, provided they do not conflict with resource preservation and protection policies.

Protection of Sites Especially Suited for Water-Dependent Uses (Policy 16). Land use designations in the CBEMP provide for uses which are water-dependent uses within areas that are "especially suited" for such uses. The policy is based upon the recognition that ESWD areas have unique attributes and, therefore, should be given priority consideration. ESWD attributes include:

- deep water close to shore with supporting land transport facilities suitable for ship and barge facilities;
- potential for aquaculture;
- protected areas which would require little dredging for use as marinas; and
- potential for recreational utilization of coastal water or riparian resources.

Urban Water-Dependent (UW) areas are made up of ESWD lands. Water-Dependent Development Shorelands (WD) contain both ESWD and non-ESWD areas.

Special Allowance for New Non-Water Dependent Uses in "Urban Water-Dependent (UW)" Segments (Policy 16A). New non-water-related uses on UW-zoned lands are allowed only through a
Goal Exception or if the local government establishes and prepares supporting findings, prior to permitting such uses, that all of the following criteria are satisfied:

- the proposed use or activity is temporary in nature (such as storage);
- the proposed use would not preempt the ultimate use of the property for water-dependent uses;
- no immediate and economically-viable demand exists to enable use of the site for water-dependent development; and
- the site is committed to long-term water-dependent use or development by the landowner.

Protection of "Major Marshes" and "Significant Wildlife Habitat" in Coastal Shorelands (Policy 17). This policy requires local governments to provide special protection of major marshes and significant wildlife habitat located within the Coos Bay Coastal Shorelands Boundary, except where exceptions allow otherwise. Local governments are required to consider major marshes identified on the Goal #17 Linkage Matrix and the Shoreland Values Inventory Map. Significant wildlife habitats include those areas identified on the Shoreland Values Inventory Map. Uses consistent with the protection of natural values include propagation and selective harvesting of forest products, grazing, harvesting wild crops, and low-intensity water-dependent recreation.

Riparian Vegetation (Policy 23). Local governments are to strive to maintain riparian vegetation within the shorelands of the estuary, and when appropriate, restore or enhance it, as consistent with water-dependent uses. Local governments are required to encourage the use of tax incentives to encourage maintenance of riparian vegetation.

Management Segment Classification System

Development Shorelands (D). This designation allows non-water-dependent and non-water-related uses. Development Shorelands, always located outside of urban growth boundaries, satisfy needs that cannot be met within urban growth boundaries.

Water-Dependent Development Shorelands (WD). Water-Dependent Development Shorelands areas are managed for water-dependent uses. Some of these areas are ESWD. Water-related and other uses are restricted to specific instances prescribed in segment management objectives. Water-Dependent Development Shorelands are always located outside of urban growth boundaries and satisfy needs that cannot otherwise be met within urban growth boundaries.

Urban Development (UD). Urban Development areas are managed to maintain a mix of compatible uses including non-water dependent and non-water-related uses. These areas are suitable for residential, commercial, industrial, or recreational development.

Urban Water-Dependent (UW). Urban Water-Dependent areas are ESWD. Water-related and other uses are restricted to specific instances prescribed in segment management objectives.

Management Segment Objectives

Management segment objectives are subordinate to policies but provide specific policy guidance about the way each segment must be managed.
Uses and Activities Matrix
The Uses and Activities Matrix of the CBEMP stipulates exactly what will and will not be allowed within each segment.

Designation of Site-Specific Management Segments, Uses and Activities
This section of the CBEMP outlines uses allowed and conditions imposed within specific shoreline and aquatic management segments. This document addresses shoreline segments classified as D, WD, UD and UW. An accompanying matrix provides an overview of these segments. Table 3-1 summarizes the CBEMP matrix for the purposes of this analysis, i.e., potential conflicts with the region's economic goals are identified.

Analysis
The CBEMP sets forth policies that govern use of the estuary and includes provisions governing the use of specific shoreland and aquatic management segments. The primary uses within the CBEMP are water-dependent and water-related. Shoreline segments are managed almost exclusively for uses that depend on the physical resources of the estuary and the region such as: natural resource protection, dredged material disposal, water-dependent or water-related industrial uses, water-based transportation, aquaculture, fish processing, and recreation uses.

The CBEMP preserves scenic shorelands and protects shorelands and aquatic segments for uses that require access to the water. Plan provisions reduce the potential for water-dependent and water-related uses to be outbid for land by less land-intensive uses. Policies also ensure that shorelands and aquatic segments are utilized in a manner that minimizes costs for water transport and dredging. Water-dependent and water-related uses are also protected from potential conflicts with other uses regarding noise, odors, and physically-unattractive features that may be associated with water-dependent uses.

The definition of "water-related," as provided within the CBEMP, includes commercial uses only if they specifically serve water-dependent uses. For example: a business that sells fishing gear would qualify as a water-related commercial use, but a restaurant patronized by commercial fishing boat operators would not qualify. In most areas where non-water-dependent or non-water-related uses are allowed, they are allowed only in areas away from the shoreline. The intensity of non-water-dependent and non-water-related uses allowed within a management segment is restricted to levels that equal the intensity of other uses within the segment. Non-water-dependent and non-water-related uses are the lowest priority uses in most management segments. Policy 16A provides for an expansion of allowed uses while protecting shorelands for future development of water-dependent and water-related uses. Policy 16A, however, allows only temporary non-water-dependent and non-water-related uses.

The Urban Development (UD) classification is intended to allow a mix of compatible water-dependent and non-water-dependent uses. These are the only segments that allow non-water-dependent and non-water-related uses outright. Within the CBEMP are 83 shoreland segments, 12 of which have a UD classification. Only five segments currently allow for commercial non-water-dependent or non-water-
related development without restrictions on type of use. (Segment 44, which includes downtown waterfront for Coos Bay and North Bend, is designated UW rather than UD.)
### TABLE 3-1
### SUMMARY OF CBEMP MANAGEMENT SEGMENTS AND POTENTIAL DEVELOPMENT ISSUES

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<td><strong>Lower Bay</strong></td>
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<td>51/UD</td>
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<td>Airport and utility uses only.</td>
<td>Pony Slough. Riprapped area.</td>
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<td>58/UD</td>
<td>c</td>
<td>p</td>
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<td>Policies 17, 23. Low-intensity rec. only if findings of no conflict w/adjacent aquatic resource.</td>
<td>Lower Bay. Tarheel Creek, res. end of Barview Wayside. Continue/expand scenic, archaeological/res. values. Public fishing pier should be considered.</td>
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<td><strong>North Slough/Haynes Inlet</strong></td>
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<td><strong>Upper Bay North Bend/Coos Bay Waterfront</strong></td>
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<td>14/WD</td>
<td>c</td>
<td>c</td>
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<td>c</td>
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<td></td>
<td>Policy 14. Ind. only for barging of jetty stone. Allow public rec. access when not used for loading jetty stone.</td>
<td>Upper Bay. Kentuck Inlet</td>
</tr>
<tr>
<td>16/WD</td>
<td>c</td>
<td>p</td>
<td>c</td>
<td>p</td>
<td></td>
<td></td>
<td>Policies 14, 23. Com. only to support exist/planned ind. does not restrict use of water. Ind. only if does not preclude use for timber transp./storage.</td>
<td>Upper Bay. Pierce Point. Near forest resource and Coosston Navigation Channel. Managed for log handling/storage/barging.</td>
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<tr>
<td>48/UW</td>
<td>c</td>
<td>p</td>
<td>c</td>
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<td>Subject to compatibility. Dredged material. Ind. subject to erosion findings.</td>
<td>Upper Bay North Bend. Connection to Hwy 101. Adjacent to railroad.</td>
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<td><strong>Coos River/Millicoma Rivers</strong></td>
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*April 30, 1998*  
Bay Area Comprehensive Economic Analysis
### TABLE 3-1, CONT.

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<tr>
<td>20B/WD</td>
<td>p</td>
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<td>Policies 14, 23.</td>
<td>Coos /Millicoma Rivers. Managed to facilitate the continued/expansion of existing rock products trans-shipment facility, with water access for barging rock from uplands.</td>
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<td>20C/WD</td>
<td>p</td>
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<td>Policy 14.</td>
<td>Manage for continued/expansion of sorting and transfer of forest resources.</td>
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<tr>
<td>20D/WD</td>
<td>p</td>
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<td>Policy 14.</td>
<td>Manage for continued/expansion of sorting and transfer of forest resources.</td>
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<td><strong>Isthmus Slough</strong></td>
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*April 30, 1998*
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<td>South Slough</td>
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<td>62/UD</td>
<td>c</td>
<td>c</td>
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<td>Policy 23. Com. only if part of shellfish operations. Ind. subject to erosion findings.</td>
<td>South Slough (Joe Ney Slough). Borders Hansen's Landing, UGB of Barview. Continue existing res., protect scenic areas, water quality. Allow uses in conjunction with shellfish culture.</td>
</tr>
</tbody>
</table>

No mark in a column means that the use is not allowed.

p = permitted

C = permitted with conditions. Conditions given under "Issues/Conflicts" column.

It = long term

Water-dep. = water-dependent use

Water-rel. = water-related use

Com. = commercial

D. Moor = dry moorage

Rec. = recreation

Res. = residential

Ind. = industrial and port facilities

Segment Designations:

D = Development Shorelands

WD = Water-Dependent Development Shorelands

UD = Urban Development

UW = Urban Water-Dependent

April 30, 1998
Policies:
Policy 14: Water-dependent, water-related commercial and industrial uses only. Must demonstrate need that cannot be accommodated elsewhere.
Policy 16: Protects area for water-dependent, water-related uses.
Policy 16A: Allows temporary non-water-dependent, non-water-related uses with restrictions.
Policy 17: Protects major marshes and significant wildlife areas.
Policy 23: Requires maintenance or enhancement of riparian vegetation.

Category Selection and Rationale:
Categories were selected for matrix that have potential for providing for a mix of uses within management segments. Commercial and dry moorage uses represent opportunities to increase and diversify the economic base of these segments. Marinas, recreation uses and residential uses represent potential markets for commercial, dry moorage and other uses.
The CBEMP sets higher priorities for resource use of shorelands than for their use as amenities which increase the profitability of non-water-dependent uses. This policy restricts the development of businesses that would capitalize on proximity of the shoreline, such as restaurants with waterfront seating or retail shops that serve waterfront visitors. This approach could also deter the development of a cohesive downtown district which utilizes the Coos Bay and North Bend shorelands for enhancing civic pride and developing tourism-based enterprises.

The extensive designation of lands for water-dependent and water-related uses conflicts with the regional business development strategy supporting greater economic diversification in key industries, including tourism. The CBEMP limits non-water-related uses (e.g., commercial uses) that could utilize a waterfront location as an income-enhancing amenity by designating them as lowest-priority. Restrictions on development intensity also limit commercial waterfront development.

Policies 17 and 23 are intended to protect the environmental quality of the estuary by regulating uses along sensitive areas of the bay. The amount of marshlands and the location of marshes, relative to urban areas, affect development patterns along shorelands.

Shoreland segments designated UD are especially constrained by Policies 17 and 23. Of 12 segments with shorelands designated UD, six must comply with Policy 23 and three must comply with both Policy 17 and Policy 23. Of the three remaining segments designated UD, one allows airport uses only, and one is to be used as a dredged material site until the site is filled to capacity. Only Segment 65 in Charleston allows commercial uses and does not have to comply with Policies 17 and 23.

Of 13 segments with a UW designation (which allows urban water-dependent and water-related uses), four must comply with Policy 23, which requires uses to maintain or enhance riparian vegetation “consistent with water-dependent use.”

COOS COUNTY ZONING AND LAND DEVELOPMENT ORDINANCE, JUNE 1991
The Coos County Zoning and Land Development Ordinance regulates land use and development for unincorporated portions of Coos County. The ordinance implements policies of the Coos County Comprehensive Plan, which incorporates the Coos Bay Estuary Management Plan (CBEMP). It is intended to promote the orderly growth of Coos County, protect and enhance the environment, conserve and stabilize property values, conserve natural resources, and encourage the most appropriate use of land. The ordinance regulates the type and location of development allowed within Coos County through zone designations. The ordinance regulates the manner in which land can be developed.

Relationship to Economic Development of the Bay Area
Land use ordinances stimulate desirable economic development to the degree that they are able to balance the interests of businesses and residents. Land use regulations can increase development of commercial and industrial land when they are flexible, clearly written, and provide for timely development review processes. Land development ordinances encourage economic development when they are developed with an understanding of the interplay of several factors, including: past and present
development trends; current economic and social trends; local and regional strengths, weaknesses, and potentials; and the capacities of transportation, water, and public infrastructure.

Plan Components
The first three chapters of the Coos County Ordinance address general aspects of the Ordinance, including the authority of the document, processes for applying for appeals, ordinance enforcement, and supplemental provisions of the ordinance. Chapter 4 provides descriptions of zoning designations, allowed uses, and development standards.

Included in Chapter 4 is Article 4.5 which implements policies and recommendations outlined in the CBEMP. Article 4.5 also governs the development of each management segment within the CBEMP, except those segments within the city limits of Coos Bay or North Bend. Each management segment has a classification, a two-letter designation such as CA (Conservation Aquatic) or UW (Urban Water-Dependent), which determines the general level of development allowed. There are nine general classifications. The Coos County Zoning and Land Development Ordinance designates each segment as a separate zone. The Ordinance provides a description of each segment/zone including its management objectives, allowed uses, and allowed activities. These descriptions also include a set of general and special conditions governing uses and activities within each segment. Table 3-1 includes the CBEMP shoreland segments that allow development. Aquatic segments are not included in the matrix.

Table 4.5 of the Ordinance provides development standards for the segments. Development standards are set according to type of use and segment designation. Standards are given for lot size, lot width and depth, frontage, setbacks, building height, and off-street parking.

Chapter V sets forth administrative processes regarding rezoning, conditional use applications, variances, site plans, public hearings and appeals. These processes apply to all development under Coos County's authority, including segments within the CBEMP. The section on rezoning includes a process and set of criteria specific to the CBEMP. The Conditional Use Applications section applies to all of Coos County, though CBEMP sections may have additional conditions "as are necessary to implement the requirements of shoreland or aquatic management units (Section 5.2.800)."

The remaining Ordinance chapters address development standards for land divisions, surveying standards, residential parks and campgrounds, and standards for off-street parking. The ordinance includes five appendices. These include policies from Volumes I, II, and III of the Coos County Comprehensive Plan. Other appendices review agricultural and forest land uses.

Analysis

Plan Organization
The Coos County Zoning and Land Development Ordinance is a large document, primarily because it includes separate regulations for each management segment within the CBEMP and the Coquille River Estuary Management Plan. While the organization of the document is satisfactory, it has editing problems that make it difficult to locate needed information. For example: Table 4.5, which provides the development standards for CBEMP segments, is referred to as Table 5.1 in some sections of the...

Bay Area Comprehensive Economic Analysis

April 30, 1998
Ordinance. The table includes footnotes that refer to Special Considerations Maps for Exclusive Farm Use, Forest Lands, and Lot Size Overlay, but these maps are not included in the Ordinance. Section 4.1.800, titled "Special Consideration Maps," says the maps are included in the Coos County Comprehensive Plan, but they are not. Instead, they are available from the planning department. Other sections of the Ordinance also refer to tables within the Ordinance and documents outside the Ordinance without providing a clear indication of how those materials can be located. Problems such as these can burden planning staff to interpret ordinance and make it difficult for developers to access and understand the information they need.

**Design and Development Standards**

Current design standards are flexible and allow the Planning Director discretion in determining the appropriateness of project design in regards to current and future development objectives of the County. This flexibility could make Ordinance implementation vulnerable to pressures from political and development interests. While more explicit standards could facilitate the development of visually cohesive and appealing commercial districts, they also have the potential for decreasing certain types of commercial and industrial development by increasing development costs.

Opportunities for developing tourism in Coos County could increase if cities in southwestern Oregon experience population growth. The Bay Area currently has a growing retiree population. Both tourists and retirees are sensitive to the attractiveness of an area. Further analysis of the potential market for tourism- and retirement-based economic development could indicate the relative importance of design and development standards to diversifying the economic base of Coos County.

**Coos Bay Estuary Management Plan**

The CBEMP zone descriptions within the Ordinance are virtually identical to the descriptions of the segments provided within the CBEMP itself. The CBEMP emphasizes industrial and resource-based water-dependent and water-related uses. Of 81 shoreland segments on the Coos Bay Estuary, only 12 have a U designation which allows non-water-dependent commercial development as an outright use. Of those 12 segments, only five have no restrictions on the types of commercial uses allowed. Only one of these segments is located outside of the city limits of North Bend or Coos Bay. The small amount of land zoned for non-water-dependent commercial development restricts the development of tourism-based or other non-water-dependent businesses that could capitalize on waterfront access as an income-enhancing amenity. (The section of this chapter that reviews the CBEMP provides a more thorough discussion of the economic development implications of CBEMP segment designations and management objectives.)

The CBEMP is complex. Uses are allowed in each segment if they meet general and special conditions, as well as the management objectives for a section. Regulations in the main body of the ordinance also apply to the segments. Management objectives for a segment may require or encourage development to support a use that was operating in the segment when the plan was adopted, but which may no longer exist. Management objectives often set priorities for uses within the segments without clearly describing how those priorities are to be implemented. Non-water-dependent uses are sometimes allowed if they do not preempt later water-dependent uses, but there is no description to clarify what preempting uses are.
Determining the boundaries for an area can be difficult. Segment boundaries are not described in terms of legal descriptions, but descriptions refer instead to local landmarks, geographic features, or surrounding buildings. The plan includes maps that regulate overlay zones (as described above). There are nine maps just for the Lot Size Overlay. Such complexity can be a deterrent to developers who may feel overwhelmed by the CBEMP regulations.

The CBEMP is also restrictive. It limits development to uses that are primarily resource-based and does not accommodate shifts in economic trends and changes in demand for shorelands. Some segments have objectives that restrict use not only by water-dependence, but also by specific type of use. For example: Segment 58 UD allows only residential and recreational uses, though it is designated for urban development; 14 WD is managed only as a barge loading site for jetty stone and public recreation; 16 WD is managed for log handling, storage and barging; 20B WD is managed for rock barging; 20C and 20D WD are managed for sorting and transfer of forest products. The degree of specificity and lack of flexibility can be impediments to attracting economic development.

COOS BAY-NORTH BEND WATER BOARD REVISED WATER DEMAND FORECAST

The Coos Bay-North Bend Water Board Revised Water Demand Forecast was prepared by the Water Board in 1996 and is included as an appendix to the Draft Environmental Impact Statement prepared by the US Army Corps of Engineers for the Joe Ney and Upper Pony Creek Reservoirs Expansion Project. The Revised Water Demand Forecast updates the Coos County Water Supply Plan, which was prepared for Coos County in 1993 by. The Forecast inventories and evaluates existing water systems and projects demand for Coos County through the year 2050.

The Coos Bay-North Bend Water Board serves the Bay Area. It is one of six primary domestic water providers in Coos County.

In 1996, the Coos Bay-North Bend water supply and treatment system served a peak day demand of approximately 11 million gallons per day (mgd), through a combination of deliveries from Upper Pony Creek and Joe Ney Reservoirs (8 mgd), and 20 wells located in the Dunes Aquifer well fields (3 mgd).

The 1993 Coos County Water Supply Plan identifies current and future system shortfalls for each provider and for industry. It also recommends measures to address those shortfalls, including conservation efforts and the development of new water sources. Demand for the year 2050 was estimated using average and high growth rates. The projected growth rates were expected to be fine-tuned by the Water Board in advance of investment in any expansion projects. The 1996 Revised Water Demand Forecast presents revised growth rates based on the Board’s review of key assumptions in the 1993 Plan, specifically demand beyond 50 years, population growth rates, growth in industrial demand, and conservation.

The 1996 Revised Water Demand Forecast presents four different growth scenarios, or “cases” : low case, base case, base case with industrial development, and high case (which assumes major population and industrial growth). The forecasts use the 1993 methodology but are calculated with revised growth
rates, which were based on changes in local conditions since 1993. Table 3-2 shows the projected water demand under each case. All four cases assume that non-residential consumption per account will decline by as much as 10 percent through conservation; i.e., industrial users are expected to build more water-efficient facilities in the future.

### Table 3-2
2050 Water Demand Estimates

<table>
<thead>
<tr>
<th>Case</th>
<th>Non-Ind’l Water Demand Growth per Annum*</th>
<th>Additional Ind’l Water Demand Growth (mgd)</th>
<th>2030 Average/Peak Season Water Demand (mgd)</th>
<th>2050 Average/Peak Season Water Demand (mgd)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low Case</td>
<td>0.25%</td>
<td>None (Current 3.0)</td>
<td>6.7 / 7.1</td>
<td>6.8 / 7.3</td>
</tr>
<tr>
<td>Base Case</td>
<td>1.03%</td>
<td>None (Current 3.0)</td>
<td>7.5 / 8.5</td>
<td>8.9 / 9.6</td>
</tr>
<tr>
<td>Base Case with Industrial</td>
<td>1.03%</td>
<td>4.0 mgd by 2020; 5.3 mgd by 2050 (total 7.3 mgd)</td>
<td>12.4 / 13.5</td>
<td>14.4 / 15.6</td>
</tr>
<tr>
<td>High Case</td>
<td>1.34%</td>
<td>34 mgd by 2050 (total 37.0 mgd)</td>
<td>33.3 / 35.3</td>
<td>61.2 / 63.8</td>
</tr>
</tbody>
</table>

* Municipal demands consist of all customer classes except large industrial users. Rate is compounded.

Source: Coos Bay-North Bend Water Board Revised Water Demand Forecast

The Revised Forecast recommends using the “base case with industrial development” as the foundation for planning the timing and sizing of water supply facilities, as this projection will accommodate substantial new water-intensive industrial development. However, the increase in industrial demand is conservatively projected to avoid speculative capital expenditures by the Board. According to the revised projections, demand will begin to exceed available supply around 2005, or earlier if a significant industrial customer locates in the area. The projections also show that expanding the Joe Ney Creek and Upper Pony Creek reservoir storage will provide the Board with adequate water through approximately 2035.

As a result of revising the water demand forecasts, it was recognized that there is considerable uncertainty inherent in forecasting future water demands. The uncertainty is due to the impacts on water demand of the composition of the customer base, in particular, the potential demand of future industrial users. Industrial users are expected to be the principal drivers of water demand in the Bay Area. As the demands of potential industrial users are uncertain, the Water Board has elected to follow a two-pronged approach that involves developing supplies to meet near term growth while incorporating flexibility to meet future growth.

Water development strategies in the Revised Forecast include:
- incrementally increasing the water supply capacity to address near-term growth, i.e. to ensure adequate supplies for potential industrial development to 2005;
• developing water supplies to a minimum of 15 mgd by 2025; capacity increments should be sized and timed to be consistent with Board strategies for securing water rights and environmental permits; and
• developing additional water supplies in available increments when demand grows to within 2 to 3 mgd of capacity. This strategy could include additional wells in the Dunes aquifer.

These strategies are designed to limit the financial impacts of investment in water supply facilities while allowing the Water Board to continue to meet its customers' water needs.

Relationship to Economic Development of the Bay Area
The greatest increase in water supply demand for the Coos Bay-North Bend area is expected to be from large industrial users. Currently, the Weyerhaeuser paper plant receives 3.5 mgd of untreated water from the Coos Bay-North Bend Water Board. 1993 Water Supply Plan projections of future water demand by Weyerhaeuser were based on two anticipated expansions. Since 1993, the expansions have been placed on hold indefinitely, and the revised 1996 forecasts include alternative scenarios of industrial development based on limited research on of possible industrial development. The Revised Forecast identifies industries that could potentially locate in the study area in the near term and the potential water use per industry. The highest potential use is by Weyerhaeuser, at up to 14.0 mgd. Other potential industries include shrimp, surimi, and high-tech industries, which would be expected to use between .5 and 1.0 mgd.

Analysis
The strategies being pursued by the Water Board are prudent, given the revised population projections and uncertainty regarding future industrial growth. The strategies are designed to incorporate sufficient, ongoing excess capacities of 2 mgd to 3 mgd, which would readily accommodate many types of potential industrial users, including those researched in the Revised Forecast (shrimp, surimi, and high-tech). Therefore, the Water Board’s strategies are not expected to severely restrict economic development. However, the strategies could discourage some water-intensive industrial users from locating in the Bay Area. Inadequate water capacity could discourage industry because of the long lead time usually required to develop additional water supplies.

CITY OF NORTH BEND 1995 COMPREHENSIVE LAND USE PLAN, PLAN PROVISION AND POLICIES (PERIODIC REVIEW NOVEMBER 1989)
The North Bend Comprehensive Plan is divided into two volumes: Volume 1 is the inventory of existing conditions, which forms the factual basis for the Plan's development; Volume 2 establishes the provisions "to meet the expectations of comprehensive planning in North Bend." The Comprehensive Plan was originally adopted in 1979. Some of the elements which have not been changed since adoption reflect the concerns of that time period, including fuel shortages and population growth. Amendments to the Plan since 1979 stemmed primarily from periodic review in November 1989. Those changes have been inserted between paragraphs of the original document.

Volume 1 of the Plan provides background information relating to the local economy and land uses. Observations about the lack of economic diversity, the status of public facilities, and transportation...
networks contributed to the development of the goals, objectives, policies, and strategies in Volume 2. Information on the Coos Bay Estuary was excerpted from the CBEMP.

Relationship to Economic Development of the Bay Area
The main elements of Volume 2 of the Plan that affect economic development are:

- Economic Element;
- Transportation Element;
- Public Services/Facilities Element;
- Recreation/Open Space Element;
- Coastal Element;
- Land Use Element; and
- Urbanization Element.

Analysis

Economic Element
The Economic Element of the plan outlines the economic situation in North Bend, notably the heavy dependence on the logging industry for employment. It was noted that a major obstacle to economic diversification away from logging is the relatively poor transportation network within the region and to the Willamette Valley. Another potential obstacle to industrial development was the limited water supply, which could discourage new water-intensive industries. The run-down appearance of the central business and commercial district was also noted.

Of particular importance to economic development was the creation of the Coos Bay Enterprise Zone, which includes much of the Port of Coos Bay and land in Coos County, North Bend and the City of Coos Bay. By establishing incentives and regulatory flexibility, the Enterprise Zone is expected to encourage existing businesses to expand and to attract new industry. More research on this economic development tool would need be required to ascertain its effectiveness.

The overall economic goal is: "The encouragement of orderly economic development and maintenance of existing economic activity which will enhance the general quality of life in the City of North Bend and the surrounding area." The intent of the goal is also to realize a balance between environmental factors and the social needs of city residents.

The Economic Element contains six economic objectives and 16 economic policies relating to economic development in general. All are designed to enhance and diversify economic development. None conflict with the regional economic development strategies considered in this analysis. The Economic Element supports economic diversification and includes references to a redevelopment plan for the downtown area (e.g., the North Bend Urban Renewal Plan, discussed in this memorandum), as indicated by the following objectives and policies:

- Objective #3: To encourage diversification of the industrial base of the City and to provide appropriate amounts of land for industrial uses.
- Objective #4: To encourage revitalization of the Sherman Avenue Central Business District.

April 30, 1998
• Policy #1: Direct industrial development into those areas which are appropriate for industrial use.
• Policy #4: Direct commercial development into areas which are appropriate for commercial use.
• Policy #5: Ensure sufficient amounts of land are available to meet the need for additional commercial Development and expansion as well as industrial needs.
• Policy #8: Consider alternatives for revitalization of the Sherman Avenue Central Business District.

Seventeen strategies are proposed to implement the Plan's goals. Those most directly affecting economic development are summarized here:

• Strategy 1: Support development of the North Bend Industrial Park.
• Strategy 2: Encourage the development of fish processing plants and other related facilities in North Bend and the surrounding area.
• Strategies 3, 4, & 5: Cooperate with other jurisdictions to improve the regional transportation network, enhance the economy, and develop additional water resources.
• Strategy 6: Strive to ensure the development of the airport facility in North Bend.
• Strategy 9: Maintain appropriate amounts of land for industrial purposes.
• Strategies 10, 11, & 12: Monitor the amount of land needed for general commercial uses and rezone land when needed, while restricting expansion of shopping centers through Planning Commission approval.
• Strategy 13: Increase the availability of parking in the downtown area.
• Strategy 15: Examine the possibility of acquiring state and federal funds for downtown revitalization.

All of these strategies can enhance economic development and diversification if appropriately implemented. Strategy 6 has already been implemented with the extension of runway 4-22, and the airport is expected to have sufficient capacity to meet aviation needs through the year 2000. Strategies 10, 11, & 12 do have the potential to hinder commercial development if a sufficient amount of land is not available for commercial uses. In addition, the restrictions on expanding commercial areas may discourage efforts to rezone a portion of the City's industrial waterfront to Central Commercial, as described in the North Bend Urban Renewal Plan (see discussion of that plan, below). Strategies 13 and 15 relate directly to the Urban Renewal Plan adopted by the City in 1995 and are in the process of development. To determine the extent to which the strategies have actually been implemented or to which funds have been assigned would require further research. The City has applied for a federal (US Forest Service) grant to undertake detailed planning and design of the downtown waterfront area.

Transportation Element

The transportation goal is to provide adequate safe, economical and convenient transportation systems. The objectives and policies support improvement of the local, regional and inter-city transportation facilities.

Objective 2 - Improved access to the City's industrial sites and the waterfront. This objective is also particularly relevant to economic development. One of the problems has been inadequate access to North Bend's industrial lands from the surrounding land areas and from the navigation channel.
Implementation strategies 4 and 8 are relevant to this analysis.

Strategy 4: Cooperate with local and regional governments and agencies toward gaining improvements in the regional transportation network. The limited regional transportation network affects the types of industrial and commercial activities that can locate in the area and may be a hindrance. Improvement will enhance future economic development opportunities.

Strategy 8: Utilize the North Bend Airport Master Plan and Commercial Airport Siting Element in conjunction with improvements and further development of the North Bend Airport. The Comprehensive Plan notes that the limited runways at the North Bend Municipal Airport restrict commercial service. Therefore, improvements to runway 4-22 since the Comprehensive Plan was first adopted should enhance opportunities for economic development.

Public Facilities Element
The Comprehensive Plan notes a few obstacles to future development, namely obstructions in attempting to extend the North Bend Airport, the potential need for additional water sources and storage to service water-intensive industries, and the need to coordinate the priority water policies of the Coos Bay/North Bend Water Board and the City of North Bend. The public facilities goal and objectives are to maintain adequate levels of services such as schools, police, fire, parks, sewer and water. As long as funding for the growth of public facilities is provided to meet the desired economic and population growth, the goal and objectives are supportive of economic development. For example, the expansion of runway 4-22 has addressed a deficiency in airport capacity. Further improvements through 2017 are scheduled in the North Bend Municipal Airport Master Plan 1980/2000, which has been adopted by North Bend, the City of Coos Bay, and Coos County. These improvements are designed to create adequate capacity through 2000. In another example, the Urban Renewal Agency of North Bend and the Water Board have been investigating alternative sources for industrial water.

Policies 1 and 6 affect economic development:

Policy 1: The City shall maintain the policy of allowing development only in areas where public facilities are readily provided or extended.
Policy 6: Continue the policy that the cost of the extension of new facilities shall be borne by those who will be served by such extension.

The extent to which these policies will affect future economic development depends on the relative cost of extending services such as water and sewer lines. However, it appears from the industrial site inventory completed for the November 1989 Periodic Review that all identified industrial sites have access to sewer and water. This is a factor in favor of development, as a site already served by utilities can be developed less expensively than a comparable site without utilities.
Recreation and Open Space Element

The goal, objectives, and policies of this element are concerned with preserving adequate open space and recreation areas for the current and future residents of North Bend. Strategy 7 affects economic development.

Strategy 7: Participate in the Coos Bay Estuary Planning Process to allow for the provision of recreational boating facilities and access points to the estuary in North Bend as well as the entire Coos Bay Estuary. Creation of additional moorage and docking facilities could stimulate increased tourism in the area. The plan for a new boating facility is also reflected in the Coastal Element which designates the east side of Pony Slough as a Development Management Unit - Marine Commercial. (See below for discussion of the Coastal Element.)

Coastal Element

This element implements strategies associated with the portion of the Coos Bay Estuary that lies within city limits. The goal and objectives aim to appropriately conserve, protect or develop the estuarine, shoreland, beach and dune resources. The Coastal Element categorizes the water area between the shoreland and the navigation channel in the Estuary into three Management Units: Natural, Conservation, and Development. There are subcategories of each management unit, resulting in eight Estuarine Management Units, each with its own set of policies and priority uses. The Natural and Conservation Units are designed to preserve or protect natural resources. Only the Development Management Units, Areas B, C, D, and H (shown on the Estuarine Management Unit Map, page 68 of the Comprehensive Plan) allow development that could require altering the water environment. The Development Management Unit provides for navigation and other identified needs for public, commercial, and industrial water-dependent uses. The Development Management Unit has two subcategories--Marine Development and Marine Commercial. These coincide with the CBEMP designations.

The use priorities set for the Development Management Unit are:
1. Water-dependent uses requiring estuarine location;
2. Water-related uses which do not degrade or reduce the natural estuarine resources and values; and
3. Non-dependent, non-related uses which do not alter, reduce or degrade the estuarine resources,

Table 3-3 identifies the management units and the permitted or prioritized uses, as well as the CBEMP designations.

The Coastal Element also discusses North Bend's coastal shorelands, including those areas identified as especially suited for water-dependent (ESWD) uses. (Refer to the section of this chapter regarding the CBEMP for a discussion of this designation). The coastal shorelands are divided in the Comprehensive Plan into four areas. Table 3-4 identifies the areas and uses permitted in each, and also refers to the CBEMP designation.

There may be a potential conflict between shoreland designations and allowed uses in the Coastal Element and the CBEMP designations and allowed uses. The management units/segments in both plans
are similar, but not identical and, since the CBEMP takes precedence over the Coastal Element, any conflicts between the two plans could potentially affect development. For example, both plans include a large management unit (Area 4 in the Coastal Element and CBEMP management segment 44 UW) that covers the shoreland area from south of Ferry Park to the south city limits. In this area, the Coastal Element permits non-water-dependent uses on developed shorelands. However, the CBEMP designates the management segment 44 UW as ESWD, which precludes non-water-dependent, not-water-related uses, except when they support water-dependent or -related uses.
<table>
<thead>
<tr>
<th>Mgmt. Unit Area</th>
<th>Location</th>
<th>Development Mgmt. Unit Category</th>
<th>Priority Uses Comprehensive Plan, Coastal Element</th>
<th>Permitted Uses, Comprehensive Plan, Coastal Element</th>
<th>CBEMP Mgmt. Segment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Area C</td>
<td>Water area between shoreland boundary and navigation channel, from mouth of Pony Slough, around North Point and south to city limits</td>
<td>Marine Development</td>
<td>2. Water-dependent uses requiring estuarine location 3. Water-related uses which do not degrade or reduce the natural estuarine resources and values 4. Non-dependent, non-related uses which do not alter, reduce or degrade the estuarine resources and values</td>
<td>Adjacent to North Point Area - Navigation - Water-dependent commercial and industrial uses - Channel maintenance, improvement and dredging - Water storage areas for industry, commerce and recreation - Restoration - Disposal of dredged material - Other appropriate activities North Point Area - Same as above, plus: - Water-related non-dependent and non-related uses not requiring fill and disposal of dredged materials (due to area being unsuitable for water-dependent uses)</td>
<td>48A DA 48 CA 46 DA 44 DA</td>
</tr>
<tr>
<td>Area H</td>
<td>Borders the eastern shore of Pony Slough, western border is the channel dividing the Slough</td>
<td>Marine Commercial</td>
<td>1. Water-dependent uses requiring estuarine location</td>
<td>- Navigation - Water-dependent commercial uses - Dredge or fill - Water transport channels where dredging may be necessary - Marina - Any uses permitted in a Natural or Conservation Management Unit</td>
<td>50 NA</td>
</tr>
</tbody>
</table>
### TABLE 3-4
**NORTH BEND COMPREHENSIVE PLAN SHORELAND DESIGNATIONS**

<table>
<thead>
<tr>
<th>Area</th>
<th>Location</th>
<th>Priority Uses</th>
<th>Permitted Uses</th>
<th>CBEMP Mgmt. Unit</th>
</tr>
</thead>
</table>
| 1. Airport | From western city limits along edge of airport to mouth of Pony Slough                    | 1. Water-dependent uses  
2. Water-related uses  
3. Non-dependent, non-related uses compatible with existing or committed uses  
4. Non-dependent, non-related uses which cause a permanent or long-term change in the features of coastal shorelands upon demonstration of public need | - Airport                                                                   | None             |
| 2. Pony Slough | From Pony Point to railroad fill adjacent to Simpson Park                                    | **Area adjacent to the Marine Commercial (Development) Management Unit**  
1. Water-dependent uses  
2. Water-related uses  
3. Non-dependent, non-related uses which retain flexibility of future use and do not prematurely or unalterably commit shorelands to more intensive uses  
4. Provide for development, including non-dependent, non-related uses compatible with existing or committed uses  
5. Non-dependent, non-related uses which cause a permanent or long-term change in the features of coastal shorelands upon demonstration of public need | None specifically stated | 50 UD           |
| 3. North Point Area | From railroad fill adjacent to Simpson Park, around North Point to Ferry Park                | 1. Provide for development, including non-dependent, non-related uses, in urban areas compatible with existing or committed uses  
2. Provide for non-dependent, non-related uses which cause a permanent or long-term change in the features of coastal shorelands upon demonstration of public need | - Industrial, possibly commercial uses  
- Suitable for intense development  
- Not especially suited for water-dependent uses | 48 UW  
47 UW |
| 4. Industrial Waterfront | From Ferry Park to south city limits                                                        | Undeveloped shorelands  
1. Water-dependent uses  
2. Uses that do not preclude water-dependent uses  
*Developed shorelands*  
1. Provide for development, including non-dependent, non-related uses, in urban areas compatible with existing or committed uses  
2. Land uses in North Bend’s dune areas shall be based on the capabilities and limitations of those areas to sustain different levels of use or development | - Port-type uses  
- Already-developed areas with water-related or non-related or non-dependent uses  
- Undeveloped areas (mostly below Simpson Heights) is ESWD uses | 46 UD  
44 UW |

*Bay Area Comprehensive Economic Analysis*  
*April 30, 1998*
Coastal Element Area 4 also incorporates CBEMP management segment 46 UD. Under CBEMP regulations, industrial and commercial uses are allowed as conditional uses in 46 UD, subject to findings regarding compatibility and erosion. However, the Coastal Element does not have such restrictions for Area 4.

Another potential conflict lies in the North Point area. The CBEMP designation on the shorelands area is 47 UW and 48 UW, both ESWD lands that limit non-water-related and non-water-dependent uses. However, the Coastal Element does not designate the area as ESWD because of strong currents and the occurrence of shoaling.

These conflicts should be resolved to facilitate future economic development.

**Land Use Element**

The goal of the Land Use Element is to continue a land use planning process and policy framework to maintain and enhance the harmonious mixture of urban land uses within the city. The objectives include providing adequate land for all six land use designations (industrial, commercial, neighborhood commercial, high-density residential, low-density residential, and parks and open space), and implementing and updating the Comprehensive Plan.

**Policy 3:** The City shall coordinate, as appropriate, land development and estuarine uses with Coos County and the City of Coos Bay so that areawide economic and resource needs can be met. As noted previously, the use restrictions of the Coastal Element, and its incorporation of elements of the CBEMP, directly affect the types and location of industry in the estuarine areas.

**Strategy 6:** Monitor programs of the Coos Bay-North Bend Water Board to ensure coordination with municipal services and to ensure long-range water resource development. Also noted previously, the coordination of water policy can affect the potential to attract industries that are water-intensive. Conflicts about the priority uses for water between the City and the Water Board could affect water supply to future industrial development.

**Urbanization Element**

Expansion of the City of North Bend is restricted by the estuary to the north and east and by the City of Coos Bay to the south and west. Approximately 118 acres were proposed for the Urban Growth Area, all of which would be designated for residential use. The goal and objectives of this element encourage the orderly, efficient, and economical transition from rural to urban development, including the orderly extension of public services to urbanizable lands.

**Policy 2:** North Bend shall encourage development of the North Spit industrial area. Although the City considered the inclusion of this area in the UGB infeasible, the Comprehensive Plan notes the City's desire to encourage marine development on the spit. There appears to be a conflict between this desire and the provision of public services, especially water and sewer, to areas outside the UGB. However, services can be extended to the North Spit under an existing goal exception. The North Spit is not yet served by sewer, which hinders development.
ZONING ORDINANCE OF THE CITY OF NORTH BEND

The North Bend Zoning Ordinance was originally enacted in 1962, updated in 1975, and subsequently amended. The purpose of the Zoning Ordinance is to "safeguard the orderly growth and development of the City, to protect values and uses of property, to secure the safety and well-being of the public, and to prevent the creation of nuisances." The residential zoning designations are:
- Single-Family (R-10, R-7);
- Single-Family and Duplex (R-6 and R-5);
- Multi-Family (R-M); and
- Residential Transition (R-T).

The commercial zones are:
- Limited (C-L);
- General (C-G); and
- Central (C-C).

Industrial zones consist of:
- Light (M-L);
- Heavy (M-H); and
- Airport (A-Z).

There is one overlay zone, Flood plain (F-P), which incorporates flood plain areas delineated by the Federal Emergency Management Agency on the Federal Insurance Rate Map. Special development standards apply in F-P zones. The Zoning Ordinance also establishes general standards for conditional uses, parking and loading, accessory uses, annexations, non-conforming uses and structures, variances from the standards, enforcement, rezones, and Comprehensive Plan amendments.

Relationship to Economic Development of the Bay Area

Zoning ordinances typically affect economic development by identifying where industrial and commercial businesses uses may be established, by requiring that such developments meet specific development standards, and by imposing development costs such as impact fees. Zoning regulations can affect the cost of, and therefore the attractiveness of, a particular site or a general area. For example, required landscaping, buffer strips, and street trees add more to total development costs and result in less developable site area. However, the lack of such requirements can also represent costs to the community as a whole in terms of livability, so that a business' employees and customers may not like to shop or work in those areas.

In addition, the permitting procedures can affect economic development to the extent that potential businesses perceive certain risks associated with specific procedures. An administrative process, for example, is generally less risky and time-consuming than a process involving a public hearing. Development of a conditional use on a specific site that must be approved through a public hearing process would usually be perceived as being more risky and potentially requiring more costly mitigation.
than would a use permitted outright on the same property. It is important to the economic health of an area to have land that is relatively simple and less risky to develop for uses that are preferred for development, at a cost that is competitive with other geographic areas.

Analysis

The main impact of the North Bend Zoning Ordinance on economic development is in the commercially and industrially zoned districts and the F-P overlay. The C-L zone is for business and professional offices and retail sales or service. The C-G zone permits all uses permitted in the C-L zone, plus most other commercial uses. Conditional uses include community service-type uses (churches, hospital, etc.), and processing, packaging or storage of food or beverages (excluding distillation, fermentation, slaughtering or rendering). Some use restrictions apply, particularly where the C-G zone abuts a residential zone. Any changes to "Unified Shopping Areas," such as strip malls or other commercial areas where three or more commercial uses on less than one acre of land share common parking and access areas, are subject to approval by the Planning Commission (Section 45, paragraph 4). (This process also affects implementation of the North Bend Urban Renewal Plan, discussed in this chapter.) The C-C and C-G permitted and conditional uses are the same. However, the C-C zone allows apartments above ground-floor commercial, has more restrictive sign regulations, and has less stringent on-site parking requirements than the C-G zone.

The Light Industrial (M-L) zone permits many industrial uses outright, as long as they do not create a nuisance from noise, smoke, odor, dust or gas. The main conditional uses include government structures or uses, and uses allowed in the C-G zone. In areas where the M-L zone abuts a residential zone, buffers and additional development standards may apply. The Heavy Industrial (M-H) zone permits all uses allowed in the M-L zone, and adds manufacturing, compounding, fabricating, processing, packing, and storage. The restriction on creating nuisances also applies in the M-H zone. Primary conditional uses include government structures or uses, junkyards, and auto wrecking yards. The Airport Zone (A-Z) permits all airport and airport-related uses, as well as all permitted and conditional uses in the M-L zone. Conditional uses include permitted and conditional uses in the C-G or R-M zones. Some restrictions on residential uses also apply in certain areas of the A-Z zone.

With the exception of the prohibition of nuisances due to noise, smoke, odor, dust or gas, the regulations on industrial uses appear to be fairly flexible. As many industries tend to create nuisances, this restriction could limit the potential for North Bend to attract such businesses. On the other hand, this restriction is consistent with policies to attract cleaner industries. The restriction on nuisances may potentially conflict with uses otherwise permitted in the waterfront industrial areas by the CBEMP. (For more information on permitted uses in the waterfront areas, please refer to the sections in this memorandum on the North Bend Comprehensive Plan and the CBEMP.)

The F-P overlay would tend to affect development along the estuary in North Bend, but is in keeping with standard building code requirements for development in the flood plain. The general requirements are to not increase flood levels, to provide a program of water course maintenance when a development would alter or relocate a watercourse, and to meet specific structural requirements to limit flood damage.
Most jurisdictions have flood plain requirements. North Bend’s requirements would not be expected to negatively affect economic development any more than similar requirements in other jurisdictions.

Conditional uses require a public hearing and must be approved by a hearing examiner or the City Planning Commission. As discussed above, a public hearing generally involves more risk and more time in the development process.

**NORTH BEND SUBDIVISION ORDINANCE**

This ordinance establishes standards and procedures for land partition in the City of North Bend and the adjacent areas within the UGB. The standards include lot and street design and layout, utilities, open space, and public facilities. The purpose of these standards is to ensure adequate sanitation and water supply for future inhabitants, to coordinate development with any overall plans, and to provide for the protection, conservation and proper use of land. The procedures consist of submitting a preliminary plat and other information for consideration by the Planning Commission at a public hearing. A final plat must be submitted within 12 months.

**Relationship to Economic Development of the Bay Area**

The impacts from a subdivision ordinance on economic development would be mostly in the requirement for adequate provision of public services. Under the subdivision ordinance, an application for a subdivision must demonstrate that public services (such as sanitary sewer, water, emergency response, police and schools) will be adequate to serve the new development. Residential subdivisions tend to have the most impact on public services. New business development would be more dependent on the availability of adequate sanitary sewer and stormwater runoff facilities (if public), and water supply. If these services are not available at specific sites, development could be hindered.

Another potential impact on economic development could be caused by lot size restrictions. Since different industries have optimum site sizes, maximum or minimum lot size restrictions can preclude development on certain parcels by certain businesses. For North Bend neither the subdivision ordinance nor the zoning ordinance places restrictions on site sizes in industrial zones; therefore such a conflict with economic development is unlikely.

**NORTH BEND URBAN RENEWAL PLAN, NORTH BEND URBAN RENEWAL REPORT, AUGUST 1994**

The North Bend Urban Renewal Plan and Report describe a plan for redevelopment and revitalization of 350 acres in the city’s central core and along the waterfront. This urban renewal area was also identified in the North Bend Comprehensive Plan as “in decline” and, therefore, in need of improvement. The renewal area centers around California Avenue and is roughly bordered by McPherson Avenue to the west, Coos Bay to the east, Florida Avenue to the north and Washington Avenue to the south. The land uses include retail and service commercial, public facilities, single-family, multi-family, office, and industrial uses as well as vacant and underutilized areas.
The areas of most relevance to economic development study are those closest to the shoreline in the urban core, and the areas that extend north and south along the bay. The land along the shoreline within the urban renewal area is zoned heavy industrial. The water area is also designated as a Development Management Unit in the Comprehensive Plan's Coastal Element, while the shoreland area is divided into two management units, North Point and Industrial Waterfront. (Maps on pages 68 and 78 in the Comprehensive Plan show the boundaries of these designations.) The Coastal Element describes the priority uses for each of these designations.

The use priorities set for the Development Management Unit are:
1. Water-dependent uses requiring estuarine location;
2. Water-related uses which do not degrade or reduce the natural estuarine resources and values; and
3. Non-dependent, non-related uses that do not alter, reduce or degrade the estuarine resources.

The waterfront renewal area is also located within North Bend's coastal shorelands and is identified on the Comprehensive Plan Shoreland Boundary map as the North Point (Area 3, from Ferry Park northward) and Industrial Waterfront (Area 4, from Ferry Park south to city limits).

General use priorities for the North Point area are:
1. Provide for development, including non-dependent, non-related uses, in urban areas compatible with existing or committed uses; and
2. Provide for non-water-dependent, non-water-related uses which cause a permanent or long-term change in the features of coastal shorelands upon demonstration of public need.

General use priorities for undeveloped land in the Industrial Waterfront shorelands are:
1. Water-dependent uses; and
2. Uses that do not preclude water-dependent uses.

General use priority for developed land in the Industrial Waterfront shorelands are:
1. Provide for development, including non-dependent, non-related uses, in urban areas compatible with existing or committed uses; and
2. Land uses in North Bend's dune areas shall be based on the capabilities and limitations of those areas to sustain different levels of use or development.

The Urban Renewal Plan prescribes an implementation plan for improvements that will encourage development and reverse the decline. The Plan recommends making the improvements in five phases starting in 1998 and finishing in 2014. An estimate of the improvement costs and a financing plan are also provided.

The revitalization plan consists of improvements to landscaping, streets, pedestrian walkways, intersections, entrances to the area and the waterfront, and the creation of new parking facilities. The Plan also recommends rezoning property from industrial to commercial uses, in the area bounded by Washington Street, California Street, Sheridan Street, and the waterfront, to facilitate mixed uses (commercial and recreational). The use and development of land in the renewal area is governed by the...
Comprehensive Plan and Zoning Ordinance although, as discussed below, there appear to be conflicts between the Urban Renewal Plan and the Comprehensive Plan.

Relationship to Economic Development of the Bay Area

The purpose of the Urban Renewal Plan is to facilitate economic revitalization and investment in the downtown core and waterfront areas. The objectives are to make the downtown area more attractive for living and working, create new public open spaces (particularly close to the waterfront), enhance pedestrian connections, provide adequate parking facilities, and provide capital improvements necessary to stimulate development in the waterfront and North Point industrial area. The core area designated for rezoning is proposed as the key to the whole plan. Acquisition of property in the core waterfront district for future pedestrian and recreational (fishing/boat docking) activities will help to connect the central commercial district and the bay, and to create a waterfront attraction that is expected to improve the image of the renewal area and draw in additional customers.

Approximately 20 acres of industrial land would require redesignation to Central Commercial in order to implement the Urban Renewal Plan. This proposed zone change presents a potential conflict between the Urban Renewal Plan and the North Bend Comprehensive Plan. In general, the Urban Renewal Plan is consistent with the economic development objectives in the Comprehensive Plan. However, Comprehensive Plan Economic Strategies #11 and #12 restrict expansion of commercially zoned areas. To expand commercial lands, the strategies require that a need for new commercial land be demonstrated, and that the proposal follow the procedures used for expanding unified shopping areas to obtain approval by the Planning Commission. Otherwise, areas adjacent to shopping centers and commercial areas "shall retain their non-commercial zoning." These strategies may be designed to prevent strip-commercial development, but they appear to conflict with implementation of the Urban Renewal Plan.

The Comprehensive Plan also classifies the waterfront area into management units, which prioritize uses and activities for the waterfront. (Please refer to discussion of the North Bend Comprehensive Plan in this chapter.) The priority uses for water areas and shorelands include non-water-related and non-water-dependent uses, but these are a lower priority than water-related and water-dependent uses. The Urban Renewal Plan is predicated on development of non-related and non-dependent uses in the waterfront area, therefore, the system of prioritizing development could be a hindrance.

The situation is further complicated by the jurisdiction of the CBEMP over the waterfront. The Urban Renewal Plan does not discuss the policies and regulations within the CBEMP, but does discuss the shoreland and water management units contained in the Coastal Element of the Comprehensive Plan. These management units are similar to those in the CBEMP, but not identical. Because the CBEMP takes precedence over the Coastal Element, any conflicts between the two plans could potentially affect economic development. Of particular importance is a large management unit that covers the area of the downtown waterfront within the Urban Renewal District—designated Area 4 in the Coastal Element and CBEMP management segment 44 UW. The Coastal Element permits non-water-dependent and non-water-related uses on developed shorelands of Area 4. However, the CBEMP designates 44 UW as ESWD, which precludes non-dependent, non-related uses, except uses in support of water-dependent or
related uses. Since the CBEMP takes precedence over the Comprehensive Plan, the conflict should be resolved to facilitate future economic development and implementation of the Urban Renewal Plan.

With respect to the North Point industrial area, the Plan recommends the City build a frontage road to provide sufficient road capacity for the type of industrial traffic planned for the area. This improvement is planned for Phase V, ending in 2014. Depending on the results of further analysis, a new park and water access below Simpson Heights is also in Phase V. This part of the Urban Renewal Plan is consistent with the overall economic goal of the Economic Element of the City's Comprehensive Plan to encourage economic development. Comprehensive Plan Objective #3 supports the Urban Renewal Plan by encouraging diversification of the industrial base of the city and providing for an adequate supply of industrially-zoned land.

As the Urban Renewal Plan is implemented, it should promote economic development in North Bend which would provide economic benefits to the region. However, conflicts between the Urban Renewal Plan, the North Bend Comprehensive Plan, and the CBEMP should be resolved in order to appropriately implement the North Bend Urban Renewal Plan.

CITY OF COOS BAY COMPREHENSIVE PLAN 2000
The Comprehensive Plan was developed through a joint effort of the Coos Bay City Council and the Committee for Citizen Involvement. The Comprehensive Plan contains general policies that guide the city's development in the areas of physical environment, ecology, historical resources, land use, transportation, economic development, housing, and recreation. The Plan, adopted in 1983, is divided into two volumes. Volume I is titled Plan Policy Document 1987-2000. It identifies challenges faced by the City of Coos Bay, sets objectives for addressing those challenges, details policies to guide improvement efforts, and provides strategies for realizing improvements. Volume II is titled Plan Inventories.

Plan Components Related to Economic Development of the Bay Area
The following section reviews components of the Comprehensive Plan that relate to economic development in Coos Bay. The plan review and analysis is based upon information gathered from both volumes of the Plan.

Water Quality
Water quality of the Coos Bay Estuary is affected by a variety of issues, such as: industrial waste, stream flow, capacities of sewer systems and water treatment plants, dredging operations, solid waste disposal sites, log operations and failure rates of septic systems. Water quality affects aquaculture production, fishing, recreational use, and tourism. Studies conducted in the late 1970s indicated the following problems in the estuary:

- Isthmus Slough - Excessive debris, high water temperature and algae growth resulting in low levels of dissolved oxygen and high sedimentation.
• Waterfront - High levels of fecal bacteria as a result of problems with the city’s sanitary and storm waste treatment systems.
• Pony Creek - Excessive debris and algae growth.
• Catching Slough - Adequate dissolved oxygen levels though sediment and temperature levels have limited water quality.
• Coos River - Water quality generally good, though water temperature tends to be high during summer months.

At the time the Comprehensive Plan was developed, the sewer system was deemed adequate to handle waste for a 20-year period; however, segments of the system were deteriorating, resulting in the intrusion of sewage into groundwater and tidal waters. The Plan does not indicate if the sewer system was expected to accommodate increases in industrial or commercial development. Plan strategies address the need to continue to segregate storm and sanitary sewer lines, expand sewer services, and upgrade the sewer collection system to improve water quality in the bay.

**Tidelands**

As of February 1973, the City of Coos Bay had:
- 255.69 acres of tideland within city limits;
- 387.18 acres of tideland outside incorporated limits; and
- 642.87 acres of tideland within the total planning area.

The Plan contains strategies aimed at maintaining and improving the health of tidelands by endorsing environmental standards and encouraging preservation and protection of riparian vegetation. These strategies emphasize the importance of preserving and protecting fish and wildlife habitat through the establishment of buffer strips along waterways and eliminating unnecessary drainage and erosion that can accompany development. Plan strategies promote cooperation between the City of Coos Bay and other government agencies in conserving and protecting fish and wildlife habitat in recognition of these areas' environmental and aesthetic values.

**Transportation**

The regional road network was deemed inadequate at the time the Plan was adopted. The Plan documents the need for improvements on Highways 42, 101, and 38 as well as needed improvements in rail service, air service, and port facilities. Within the City of Coos Bay, road systems were considered inadequate between Eastside and Coos Bay, which limited the development potential of the Eastside area.

Chapter 5, in Volume II of the Plan, provides an assessment of the city's transportation system. In 1978 the Coos Bay Roadway and Traffic Safety Management Plan was developed. Although the study provided data regarding necessary street improvements, the recommendations of the study were rejected by city residents under referendum, and the overall merits of the study were questioned. The Comprehensive Plan does not provide detailed strategies for addressing inadequacies in local and regional transportation systems. Since adoption of the Coos Bay Comprehensive Plan, a transportation study was conducted for the Bay area. It was completed in 1995.
Recreation

Public attitudes, in 1978, supported increased public access to the city's waterfront. The City's strategies for recreation provided increasing opportunities for developing parks and increasing open space, without committing to expensive projects. Recreation Strategy #1 advocates aiding the Committee for Citizen Involvement in their work to establish a recreational facilities committee to provide guidance on the type of projects desired by Coos Bay residents and the manner for achieving desired results.

Economic Development

Historically, Coos County's economy has been resource-based. At the time the Coos Bay Comprehensive Plan was developed, locally-processed timber products accounted for the majority of products exported from the Port of Coos Bay. (This is still the case.) The plan notes a decrease in exports of forest products while anticipating future increases in exports. The availability of timber is seen as the primary limitation on the export of wood products. Coos Bay is expected to maintain a competitive advantage in the export of wood products because of the economic attractiveness of water transport and Coos Bay's strategic location in relationship to timber supplies and international markets.

The Plan lists the following impediments to economic development:
- over-dependence on forest products industry;
- lack of a deepwater trawler basin to take advantage of underutilized fisheries resources along the coast;
- inadequate cold storage and ice facilities to accommodate fish processing; and
- an inadequate transportation system.

Coos Bay's isolated location is seen as both an impediment and a potential for economic development. While the location reduces opportunities for industrial development, it increases opportunities for developing a tourism base.

Downtown Development. In the early 1960s the City spent over $5 million in public and private funds to create the Coos Bay pedestrian mall. The project did not live up to expectations, and prime commercial land sat vacant. The Coos Bay Comprehensive Plan focuses on downtown development in Economic Development Strategies #3 and #13. Economic Development Strategy #3 emphasizes the need for cooperation with merchant and civic organizations in an effort to stimulate commercial activity in the mall district. Economic Development Strategy #13 states, "Coos Bay shall investigate all reasonable means to consolidate and enhance commercial, civic, and residential uses in the central area of the city through the redevelopment and rehabilitation ..." This strategy is aimed at increasing the vitality of the downtown area by increasing the number of people in the area and the variety of activities they can engage in. The Central Commercial Zone implements Plan objectives to support commercial development in this area by emphasizing the following land uses: retail stores, professional services, public facilities, and cultural attractions.

The Plan recognizes the potential for promoting tourism as an economic development strategy. Economic Development Strategy #8 promotes locating RV parks near commercial areas to allow local
business people to more easily attract tourist spending. Economic Development Strategy #9 supports locating a convention center in Coos Bay as another way to promote tourism.

**Industrial Development.** As of 1977, the city had 520 acres zoned to allow commercial use, and only 37 acres (7 percent) were used by industry. In 1982, industrial uses utilized 53 acres (10 percent), while 250 acres (48 percent) were used for commercial and service activities. The Plan recommends that the City reexamine land uses and land use zones to determine if some areas zoned for industry would be better suited for commercial uses. The plan recommends planning for industrially-designated areas "on the basis of their realistic and practical utilization, recognizing that some of Coos Bay's traditionally designated industrial areas are not suited solely to industrial uses." (Economic Development Strategy #5.)

**Analysis**

The Coos Bay Comprehensive Plan provides guidance to the City on a variety of issues, setting general policies rather than describing specific programs and projects for meeting comprehensive plan goals and objectives. The plan does not provide budgets for implementation. The City's primary role within the plan is as implementor of land use policies. In other areas of civic improvement, the City's role is to promote, support, and cooperate with the efforts of others. This approach may indicate limited budgetary capacity to implement desired improvements. Without fiscal resources and detailed alternatives for making needed civic improvements, the city may have a diminished ability to direct efforts to stimulate the area's economy. With the property tax limitations of Ballot Measures 5 and 50, the City's fiscal resources are likely to be strained.

**Tidelands**

The extensive tidelands within the city limits could restrict development along shorelands. With limited access to water, a process for evaluating the relative advantages of various types of development and the possible impacts of development on tidelands is critical.

**Infrastructure**

The Plan documents serious limitations in Coos Bay's infrastructure, possibly impeding economic development. Without clear plans to upgrade infrastructure, the City could find it difficult to attract new industry. Poor water quality in the bay could also hamper economic development efforts by having a negative impact on the health of the estuary, the aquaculture industry, and tourism-based commerce. However, as described in the Economic Opportunities Analysis chapter (Chapter 2), the region's water quality has improved since the mid-1980s.

**Economic Development**

The Plan recognizes the attributes of the downtown area as a core for commercial development. The downtown area's location near the waterfront and high concentration of historically noteworthy properties make the district well-suited for revitalization efforts; however, the City's previous investment in a downtown pedestrian mall yielded disappointing results. The Plan identifies the waterfront area adjacent to the Coos Bay downtown mall as having potential for greater moorage facilities, as well as recreational and tourist facilities, but many areas along Coos Bay's waterfront remain undeveloped. Linking
downtown development with waterfront development could create a critical mass of activity that would spur interest in the area as a shopping and recreation district. However, the Plan does not provide guidance regarding this type of development. In addition, development of the waterfront area is regulated by the CBEMP.

Plan goals and strategies relating to the use of shorelands are in conflict with one another. The city hopes to attract tourism while restricting much of the city's waterfront property to industrial uses. Shoreland designations within the CBEMP, which the Comprehensive Plan endorses, restrict waterfront uses near the Coos Bay downtown to water-dependent industrial uses. While waterfront access provides Coos Bay with a competitive advantage as a port, the CBEMP regulations do not allow most types of commercial development (including restaurants and lodging facilities) along the waterfront. Limitations on public and commercial waterfront development prevents the City from capitalizing on its waterfront to encourage tourism.

The Comprehensive Plan acknowledges a local lack of industrial land and identifies conflicts in providing sufficient land for industry. Much of the land designated for industry in the City's previous Comprehensive Plan (adopted in 1974) actually developed in a commercial nature, and a considerable amount land currently zoned for commercial and industrial use (I-C Zone) is not used for industry. Instead, commercial uses dominate these areas, leaving remaining land in parcels too small to be developed for intensive industrial uses. The mix of uses often precludes intense industrial development, which is not necessarily compatible with commercial and other uses. The Plan recommends continuing use of the I-C zone to retain the commercial character of these lands, and suggests reevaluating land uses to determine if lands currently zoned to allow industry can realistically be developed for those uses.

The Plan also recommends preserving, and possibly expanding, lands for exclusive industrial uses to provide sufficient land and services to accommodate the needs of intense industrial uses. This objective is to be implemented by continuing "to protect areas along the waterfront for industrial uses at sites, identified in compliance with the coastal goals, to possess locational characteristics making them more useful for water-dependent and water-related activities . . . . The city shall attempt to zone additional property exclusively for industrial use with severe restrictions on commercial activities (9-9)." This strategy conflicts with the City's current desire to utilize its waterfront to encourage tourism.

The Plan does not provide direction for deciding how to resolve conflicting interests regarding land currently designated for industrial use, whether in the I-C zone or along the waterfront (W-I zone). Without clear direction, decision-making can be slowed, which can create uncertainty and slow approval processes—both of which may discourage potential developers.

**CITY OF COOS BAY LAND DEVELOPMENT ORDINANCE 93**

Coos Bay adopted its land development ordinance in June 1987. The ordinance implements the City's Comprehensive Plan 2000, Volume I, Plan and Policy Document; Volume II, Plan Inventories; and Volume III, which includes applicable portions of the CBEMP. (The former City of Eastside's
Comprehensive Plan was incorporated with the City of Coos Bay's Comprehensive Plan 2000 after consolidation of the two cities in 1983.

The Coos Bay Land Development Ordinance establishes zoning districts and land development regulations and standards for land use, land divisions, and planned unit developments. The City's land development ordinance, along with the Land Development Map (which identifies zoning designations for all areas of the City of Coos Bay), is used to determine what uses are allowed to develop and the standards for development, according to zoning designation.

Relationship to Economic Development of the Bay Area
Zoning designations and regulations directly affect the development potential for each parcel of land within the city by specifying the type of development allowed on each parcel. The designations and regulations also affect the economic development by implementing the City's Comprehensive Plan, which sets the policies for development of the city and determines the amount of land designated for each land use category (commercial, industrial, and residential). The ordinance must also be consistent with the policies of the CBEMP, where applicable (i.e., shorelands included in CBEMP management segments).

Analysis
This section summarizes sections of the development ordinance that may conflict with the region's economic development goals.

Article 2 - Zoning Districts
This section focuses on the zoning regulations related to commercial and industrial zoning districts, since they are related more directly than residential districts to economic development.

Chapter 2.8 - Central Commercial District (C-1). The Central Commercial (C-1) district policies generally support the Bay Area's economic vision by permitting a wide range of civic and commercial uses (including, among other uses, restaurants and lodging), multi-family or group residential uses above the first floor, and limited manufacturing uses. (See Article 4 discussion, below.) Community recreation uses are prohibited in the C-1 district—a potential conflict with the Bay Area's goal to develop recreational and historical attributes of the area's core commercial districts. The C-1 district covers the city's historic downtown area, generally between Curtis and Highland streets, west of Highway 101.

Chapter 2.9 - General Commercial District (C-2). The General Commercial (C-2) district allows all of the uses allowed in the C-1 district, as well as some additional commercial, residential and agricultural uses. Community recreation is allowed in the C-2 district. The C-2 district also allows some specific Conditional Uses that are water-dependent or -related (aquaculture, dry-land moorage, marina) and additional recreation uses (outdoor spectator sports and entertainment, campground). There appear to be no potential conflicts between the C-2 district policies and the Bay Area's economic development goals.

Chapter 2.10 - General Industrial District (G-I). The General Industrial (G-I) district excludes most commercial and residential uses, and sets aside areas for industrial uses only. The only area zoned G-I in
the city is approximately 80 acres in west Coos Bay, near Cameron Road. There appear to be no potential conflicts between the G-I district policies and the Bay Area's economic development goals. However, because land is now in federal trust for the Coquille Indian Tribe, land development is not governed by the City's Land Development Ordinance.

**Chapter 2.11 - Industrial/Commercial (I-C).** The Industrial/Commercial (I-C) district allows all of the commercial uses allowed, either outright or conditionally, in the C-1 and C-2 districts. The I-C district also allows most industrial uses, provided they are approved through Site Plan and Architectural Review and comply with applicable state and federal regulations, particularly those related to noise and byproducts. The district is intended to provide for warehousing and distribution of goods and to provide for commercial and light industrial uses which are compatible with adjacent residential and commercial uses. Although this district allows for a mix of uses, promoting a diverse economy, it may result in a perceived loss of industrial lands if I-C land develops primarily with commercial uses. The I-C zone occurs in several locations throughout the city of Coos Bay, notably along the west side of Highway 101 from Highland Avenue north to North Bend, south of Johnson Avenue and East 7th Street, and on a portion of the former dredge disposal area in the Eastside District (CBEMP management segments 27 UW, 26 UD, 24 CS, 23B UD).

Applicants must obtain any special permits required by local, state, and federal agencies and must obtain Site Plan and Architectural Review approval for the "establishment, intensification, or major remodeling of any use in the I-C district if the use is within 400 feet of any residentially zoned property." Most of the I-C district along Highway 101 is bordered on the west by residentially zoned land. Proposed development in most of this I-C area would, therefore, require Site Plan and Architectural Review.

There appear to be no significant conflicts between the I-C district policies and the Bay Area's economic development goals, as long as I-C lands develop with a mix of commercial and industrial uses. Site Plan and Architectural Review requires development applicants to submit detailed plans and attend a public hearing before the Planning Commission.

**Chapter 2.12 - Waterfront Industrial District (W-I).** The Waterfront Industrial (W-I) district is intended to reserve the city's waterfront for water-dependent and water-related uses. Land use and development of W-I lands are regulated by the CBEMP. The W-I lands in the city are located along the city's western edge (CBEMP management segment 54 UW), the city's eastern waterfront (management segments 44 DA, 43 UW), and in the Eastside area (management segments 27 UW, 23 DA, 28 UW). Some of these areas are classified as ESWD (Especially Suited for Water-Dependent use).

Development applicants must obtain any special permits required by local, state, and federal agencies and must obtain Site Plan and Architectural Review approval for the "establishment, intensification, or major remodeling of any use in the W-I district if the use is within 400 feet of any residentially zoned property." The W-I policies require utilities to be installed underground, when practical, and limit industrial byproducts and noise to levels permitted by applicable local, state, and federal regulations. These policies may increase the cost of developing W-I lands, but do not necessarily impede economic development. However, those areas designated for ESWD uses have more restrictive development...
regulations, as discussed in this memorandum under the CBEMP policies, which limit economic development potential ESWD land, especially for mixed-use and commercial development.

Article 3 - General Conditions

Chapter 3.16 - Estuarine and Coastal Shoreland Uses and Activities. According to this policy, any uses or activities within the estuary or shoreland area, as defined by the CBEMP, are subject to review by staff of the Coos Bay Community Services Department. The review is to determine whether the proposed use or activity complies with the applicable provisions of the statewide planning goals, the CBEMP, and the city's development ordinance.

Applicants proposing uses or activities under the jurisdiction of the CBEMP must submit a map, fee ($200), and narrative statement describing the proposed use or activity’s compliance with the CBEMP and ordinance provisions. City staff will render a tentative decision within 10 days of a complete application. Notice of the decision is mailed to adjacent land owners and a specified list of state and federal agencies. If the decision is not appealed within 15 days from the date notice was mailed, the decision becomes final.

The CBEMP review does not conflict with local economic goals. However, CBEMP regulations for management segment 44 UW, on Coos Bay's downtown waterfront, restrict development to ESWD uses and do not allow commercial development in this area. This conflict does not support the region's goal of developing a historic, mixed-use area along the Coos Bay waterfront.

Article 4 - Special Site Development

Chapter 4.8 - Manufacturing. Chapter 4.8 establishes specific standards for siting manufacturing facilities in the C-1 and C-2 zones. Manufacturing uses allowed in C-1 and C-2 zones must use light, hand-operated machinery or equipment (not automated mass-production), their appearance must be compatible with allowed commercial uses, and the manufacturing use must not result in any by-products that could cause on-site contamination of air, land, water, or noise quality.

Applications for manufacturing uses in the C-1 or C-2 must go through the conditional use permit process, which requires a public hearing and decision by the Planning Commission. However, the approval criteria for manufacturing uses in those zones is relatively simple and straightforward, and review could likely be accomplished by Community Services Department staff. The conditional use permit process is more costly and time-consuming than administrative review and may discourage potential businesses from locating in commercial zones, despite compatibility with surrounding uses.

CITY OF COOS BAY GOALS, 1996

The City of Coos Bay's goals were developed during a goal planning work session in March of 1996. The session involved the mayor of Coos Bay, city councilors, city committee and commission members, community leaders and department heads. Goals were modified slightly during a City Council meeting. Goals were identified in the areas of economic development, infrastructure, public safety, public
involvement, budget and intergovernmental cooperation. Listed below is a partial list of the goals. These goals are listed in order of priority, as they were voted on in the goal planning session.

- Balance 96/97 Budget while maintaining or increasing cash carry-over (10 percent of total budget) (B).
- Complete a Bay Area Strategic Development Plan (ED).
- Complete the library expansion project (ED)
- Pursue development of a holding facility of a satellite jail in the Bay Area (PS).
- Be open to and initiate more cooperative efforts with outside parties (IC).
- Commence redevelopment of Front Street, by first putting together a conceptual development plan (ED).
- Provide urban renewal education (PI).
- Development interactive and public access TV (Pl).
- Explore creation of new partnerships for economic development and explore funding mechanisms (ED).
- Develop Capital Improvement Plan for sewer line replacement/funding mechanism (I).
- Develop Capital Improvement Plan for street maintenance projects, i.e., overlays, replacement (I).
- Pursue measures/ordinance to address/combat drug related crimes (PS).
- Initiate training cooperative between departments and Bay Area government agencies (IC).

ED = Economic development
I = Infrastructure
PS = Public Safety
PI = Public involvement
B = Budget
IC = Intergovernmental cooperation

Analysis
The goals support fiscal responsibility, infrastructure improvement, urban renewal efforts, and intergovernmental partnerships, indicating that economic development is a high priority for City leaders. The goals are consistent with policies set forth in urban renewal plans and the City of Coos Bay's 1988 Comprehensive Plan.

CITY OF COOS BAY URBAN RENEWAL PLAN, 1988
The Coos Bay Urban Renewal Plan was developed in 1988 to revitalize blighted areas in the City of Coos Bay. The City's first urban renewal district was created in 1968 and included the central downtown business district. The principal project of the plan was the creation of a pedestrian mall. The mall was accomplished by closing a portion of Central Avenue, relocating utilities underground, replacing deteriorated buildings with parking lots, and constructing canopies over walkways within the mall. The urban renewal district was to be implemented in four phases, but only the first phase was completed. The expected revitalization in the downtown area failed to materialize. In 1988, the area had a vacancy rate of 5 to 6 percent, but its physical appearance gave the impression that vacancy rates were higher.

The Coos Bay Urban Renewal Plan has three goals:
1. Develop the city's waterfront to enhance its potential for recreation, tourism, and other commercial activities while preserving its role as a working waterfront that supports the area's forest products and marine-related economy.

2. Revitalize the downtown core area by repair and change to, but not total elimination of, the pedestrian mall and by other activities that promote effective utilization of the downtown area for a wide variety of purposes while recognizing its changing role away from high-traffic, consumer retail activities.

3. Improve streets, utilities, and other essential infrastructure in areas of the city within the urban renewal district where they have deteriorated, are non-existent or where modifications are necessary to support and/or encourage expansion of new commercial and industrial activity.

Though the Urban Renewal Plan recognizes these goals as being of equal importance, it ranks them in this order for the purposes of financial analysis. The Plan advocates making maximum use of tax increment revenues to support financing of the proposed projects. The Plan encourages projects that use public projects to spark private investment.

Urban Renewal District

The Urban Renewal District of the Plan covers most of the eastern shoreland areas in the City of Coos Bay. The downtown core is included, as is a commercial area along the shoreland south of the city's downtown. Undeveloped industrial lands north of Eastside are also included.

The downtown area has a variety of retail uses, government offices, and financial and professional services. The area contains structures built in a range of architectural styles. Some buildings are large, modern, and in good condition. Others are older and deteriorating. The area contains a number of historically significant buildings. The Chandler Hotel and old Elks Lodge have been restored and are on the National Register of Historic Places. The Coos Art Museum, in a building that formerly held the Coos Bay Post Office, is the downtown core's southern anchor. On the west side is a new city hall, modern library, and new financial institutions and professional offices.

The Eastside industrial area remains, for the most part, undeveloped. The majority of the land is part of the Port of Coos Bay's proposed 500-acre Eastside Commercial and Industrial Park. The property sits on a stabilized coastal area above the flood plain and is served by utilities.

The southern portion of the Urban Renewal District includes a variety of industrial and commercial activities. The area is zoned Industrial Commercial (I-C), except for a portion along the Isthmus Slough, which is zoned Waterfront Industrial (W-I). Development in this area was initiated by a Fred Meyer complex along Highway 101. Waterfront development from the downtown area south along the west bank of Isthmus Slough is sporadic and limited.
Proposed Projects

Plan projects fit into three broad categories: Waterfront Development, Core Area Revitalization, and Streets and Infrastructure. Following is a list of projects proposed in the Urban Renewal Plan:

Waterfront
- Boardwalk from Market Street to Curtis Street.
- Pedestrian access across railroad tracks at two points in the downtown area.
- Observation deck on walkway with interpretive displays.
- Purchase of property to use in mitigating dredge, fill, and marine construction activities that are part of the Urban Renewal Plan.
- Extension of Sixth Street to provide access to and through the industrial/commercial lands in the Urban Renewal District if potential tenants commit to development of this property.

Core Area Revitalization
- Acquire property and construct convention/performing arts center in two phases.
- Open Central Avenue to one way traffic.
- Modify existing mall canopy.
- Establish loan funds to assist core area property owners with:
  - building facade beautification projects.
  - major building renovation projects and new construction
- Develop RV rest area north of new highway couplet between Curtis and Elrod.
- Construct a linear park from Curtis to Coalbank Slough along waterfront.

Utilities and Transportation
- Develop/improve utilities in downtown and south end of town.
- Underground utilities on Highway 101 form Market to Curtis.

Relationship to Economic Development of the Bay Area

The Plan states that waterfront projects are consistent with Coos Bay Estuary Management Plan (CBEMP) Issue Number 4. It is unclear, from the plan text, what portion of the CBEMP is being referenced. Eastside development is consistent with City of Coos Bay Comprehensive Plan Economic Development Strategies 11 and 12. Strategy 11 supports the designation of appropriate amounts of land suited for commercial/industrial development. Strategy 12 supports the development of a commercial and/or industrial park within the city.

Development of a convention center is consistent with Coos Bay Comprehensive Plan Economic Development Strategy 9, which says the city shall "cooperate with efforts" to build such a facility. Efforts to revitalize the downtown mall are consistent with the Comprehensive Plan's Economic Development Strategies 3 and 13, which emphasize more intense development of a mix of uses in the area. The Urban Renewal Plan's proposal to develop an RV rest area and linear park is consistent with Coos Bay Comprehensive Plan Economic Development Strategy 8, which states that "Coos Bay shall designate areas suited for recreational vehicle parks," as a way to increase commercial trade.
Expected completion date of Urban Renewal Projects: 2019

Analysis

Though the Urban Renewal Plan identifies Coos Bay Comprehensive Plan strategies consistent with Urban Renewal Plan, it does not discuss conflicts with Comprehensive Plan implementation. Specifically, the land use component of the Comprehensive Plan mandates continued City protection of areas along the waterfront "for industrial uses at sites, identified in compliance with the coastal goals, to possess locational characteristics making them more useful for water-dependent and water-related activities" (Coos Bay Comprehensive Plan, 9-9).

The Coos Bay Urban Renewal Plan provides only minimal discussion of CBEMP policies and regulations. Seven management segments of the CBEMP lie within the Urban Renewal District boundaries. Four of the segments have a UW (Urban Water-Dependent) designation. CBEMP segments with this designation are managed for water-dependent uses, as prescribed in the management objectives for each segment. The remaining three segments have a UD (Urban Development) designation, which allows a mix of uses, including non-water-dependent uses, as prescribed in the management objectives for each segment.

The Eastside portion of the Urban Renewal District includes the following CBEMP segments:

- **Segment 23A UW** is located on the southeast corner of the Eastside area of the Urban Renewal District. The shoreland segment is to be managed for water-dependent uses including industry, land transportation facilities, low-intensity recreation, dry moorage, and commercial.

- **Segment 23B UD** is located on the northeastern portion of the Eastside area. The shoreland segment is to be managed as a dredged material site until the site is filled to capacity. After that time, the segment can be used for non-water-dependent commercial, industrial, dryland moorage, and land transportation. This segment must be developed in conjunction with Segment 23B to assure that development closest to Segment 23A complements rather than hinders water-dependent uses on Segment 23A.

- **Segment 26 UD** is located in the north central portion of the Eastside area. The shoreland segment is to be managed as a dredged material site until the site is filled to capacity. After that time, the segment can be used for non-water-dependent commercial, industrial, and land transportation. All permitted uses must be consistent with Policy 23 of the CBEMP, which requires protection of riparian vegetation.

- **Segment 27 UW** is located on the northwest portion of the Eastside area. The shoreland segment is to be managed for water-dependent uses for the area 700 feet or less inland from the western shoreland. Allowed uses include industry, land transportation facilities, recreation, dry moorage, and commercial. The management objective for this segment encourages industrial uses and other uses that provide upland support facilities for a marina located in Segment 26B. Non-water-dependent uses are allowed more than 700 feet from the western shoreland if findings are documented that the
proposed use does not interfere with water-dependent uses, is consistent with the Oregon International Port of Coos Bay Master Plan, protects shorelands for water-dependent uses; and sets industry as a first-priority use. All permitted uses must be consistent with Policy 23 of the CBEMP, which requires protection of riparian vegetation.

The Downtown Waterfront of the Urban Renewal District includes the following CBEMP segment:

- Segment 44 UW covers the entire shoreland portion of the downtown area of the Urban Renewal District. The shoreland segment is to be managed for water-dependent uses including industry, land transportation facilities, recreation, dry moorage, and commercial. All uses within this segment must be water-dependent unless they are temporary uses and do not interfere with current and future water-dependent uses. Development of the City of Coos Bay's downtown waterfront development project, including boardwalk, is allowed.

The Southern Waterfront of the Urban Renewal District includes the following CBEMP segments:

- 42 UD is the southernmost shoreland portion of the southern area of the Urban Renewal District. The shoreland segment is to be managed for a continued mix of urban uses. The segment can be used for non-water-dependent commercial, industrial, recreation, and land transportation. Inventoried resources requiring mandatory protection in this segment are to be protected according to the requirements of Policies 17 and 18 of the CBEMP. All permitted uses must be consistent with Policy 23 of the CBEMP, which requires protection of riparian vegetation. An exception to Goal 17 is required to develop the small dike wetland located south of Dakota Street.

- 43 UW is located north of Segment 42 in the southern area of the Urban Renewal District. The shoreland segment is to be managed for water-dependent uses including industry, land transportation facilities, low-intensity recreation, dry moorage, and commercial. The site is constrained by the location of the railroad and the close proximity of the shoreline.

Restrictions placed on downtown waterfront by both the CBEMP and the Coos Bay Comprehensive Plan limit the development potential of the area and may result in minimal increases in tourist traffic to the downtown area. Management segment 44 UW of the CBEMP allows public access and recreation along the downtown waterfront but prevents development of restaurants and other commercial uses that are not water-dependent, even if they are enhanced by proximity to water. The Comprehensive Plan supports the CBEMP designation. Given the access barriers to this segment created by Highway 101 and the railroad, tourist visits to the downtown area may be limited without the draw of waterfront dining, lodging, and shopping.

CITY OF COOS BAY URBAN RENEWAL REPORT, 1988
The Coos Bay Urban Renewal Report provides rationale for the selection of projects described within the Coos Bay Urban Renewal Plan. The report discusses the physical, social, and economic conditions
within the Urban Renewal District and identifies causes for blight. The Urban Renewal District is made up of four sections:

- Waterfront;
- Water-related industrial and commercial sites;
- Core area; and
- Other downtown commercial sites.

Urban renewal, within the context of the Urban Renewal Report and the Urban Renewal Plan it accompanies, is a plan and process to "assist, encourage and guide private investment activities utilizing, where possible, existing structures." Projects are chosen that have the greatest ability to leverage funds, tap under-reached markets, or catalyze private investment. The plan seeks to minimize costly speculation for the City of Coos Bay.

**Waterfront**

The waterfront area was selected to be part of the Urban Renewal Plan because it fails to tap a perceived underutilized resource—passing tourists. Waterfront revitalization can connect anticipated downtown revitalization to the efforts at new development at the city's southern edge.

The Report attributes lack of waterfront access for visitors with current underdevelopment along the waterfront. Waterfront access, through a boardwalk or other facility, is considered an important "seed" project to attract private and public investment to the waterfront area. Urban redevelopment consultants, cited in the Report, suggest that future waterfront development might include restaurants, shops, recreational docks, and a small marina. The Report recommends projects that allow access to the waterfront because they are a rapid, relatively inexpensive way to draw visitors to the area. These projects can also revitalize the downtown area with minimal cost.

**Water-Related Industrial and Commercial Sites**

The Eastside area is considered prime for development of industry and commercial uses. The area is served by adequate water, sewer, power, and phone services but lacks an adequate road connection linking it to Highway 101. This area was selected for inclusion in the Urban Renewal Plan because it is the largest and most choice parcel of land available in the city for water-related industrial and commercial development. The Report recommends a road project to connect this area to Highway 101 as a way to encourage industrial development.

**Core Area**

The downtown area of Coos Bay has suffered decline since the 1960s when the area lost much of its customer base to shopping centers in outlying areas. An urban renewal plan during that time sought to halt this loss through construction of a pedestrian mall, which proved unsuccessful in solving the area's problems. Recent efforts signal the beginning of a transition in the downtown core. While the area does not generate high traffic, it does have specialty shops, professional offices, a newly restored Chandler Hotel, and the Coos Art Museum. The Urban Renewal Report recommends efforts to guide a transition in uses in the downtown area. The Report emphasizes upgrading the physical structures of the area to make it more attractive and capitalizing on the area's proximity to the waterfront to generate interest in
the area. The downtown would have a new function as the civic center for the city, with cultural attractions, recreation, and shopping. This area was selected to be included in the Urban Renewal Plan because of its potential for improvement and its underutilized, somewhat deteriorated state.

The Report recommends providing revolving loan funds for building renovation and new construction because they promote more intensive use of an underutilized resource. The report also recommends a convention/performing arts center to serve as an “anchor” to help stabilize the downtown area. This type of use could complement tourist-oriented development and could spur property owners to upgrade their buildings.

Other Downtown Commercial Sites
The “Other Downtown Commercial Sites” area is located on the south end of the Urban Renewal District between Highway 101 and the Isthmus Slough. The area lacks adequate or developed streets and utility infrastructure. This area was selected to be included in the Urban Renewal Plan because recent and future development will require improvements to streets and utility infrastructure.

The Report recommends an RV rest area near the north end of the proposed new highway couplet to assist in waterfront development and increase the amount of tourist dollars spent in local businesses. A linear park along the waterfront could link the downtown with new development on the southern end of town while promoting tourism. Street and utility infrastructure projects are also recommended because of current development in the area and potential development, which could be encouraged with infrastructure improvements.

Total project costs: $17,640,000

Analysis
The Urban Renewal Report provides clearly defined projects with sound rationale to support the projects. The projects are mutually reinforcing. The Report, and its financial tables, provide priorities for project implementation.

The Report postpones implementation of mall improvements and revolving loan funds for downtown revitalization until after the development of a convention/performing arts center. Development of the convention/performing arts center was set to begin in 1996, and improvements to the mall and downtown buildings were postponed until 2002. (Plans for the convention/performing arts center have since been postponed indefinitely.). The waterfront project, which is given a priority ranking of 1, was scheduled to begin in 1990 (the boardwalk, viewing platform, and interpretive area have been completed as of this writing), yet downtown projects, which complement the waterfront project, are given a ranking of 4 (out of 5). Given the higher costs of a convention/performing arts center and the potential for downtown improvements to increase the aesthetic appeal of the area, changing the priority of these projects might be warranted.

The Report does not suggest ways to address conflicts between tourism-oriented waterfront uses and uses allowed under CBEMP regulations (non-water-dependent uses along the downtown waterfront are
restricted). Without revisions to the CBEMP, waterfront commercial development, as envisioned by the Urban Renewal Plan and Report, will not be possible.

The Plan relies on tax increment financing to fund the bulk of projects proposed within the plan. Before the passage of state property tax limitation Measures 5, 47 and 50, tax increment financing was a popular tool for funding urban renewal efforts. Increases in property tax revenues, that result from improvement-induced increases in property values, are used to finance the cost of urban renewal and other improvement efforts. This funding strategy is typically applied to projects that are large in scale and are expected to have a significant impact on property values.

Because the Urban Renewal Plan is a phased project, impacts of improvement projects can be expected to be gradual. This limits the immediate benefits property owners can realize as a result of urban renewal projects. In addition, the proposed tax rate given in the financing section for the Urban Renewal Plan is $28 per $1,000 of assessed value. The gradual nature of realized impacts of improvements and the high tax rate on property could work as disincentives to investment in the area. This is particularly true given that some jurisdictions offer tax incentives (such as property tax abatements) to large companies interested in locating to their area.

Property tax limitation measures could severely limit the City of Coos Bay’s ability to finance implementation of the Urban Renewal Plan. Measure 5 limits the City of Coos Bay’s ability to collect taxes to pay for urban renewal projects. Under the measure, property tax rates for a jurisdiction’s general fund cannot exceed one percent of the property value. If combined general government tax rates exceed the limit, the rates are compressed to one percent, and collected revenues are distributed in proportion to their rate of taxation. Property taxes dedicated to paying off bond debt are excluded from the provisions of Measure 5.

Measure 50 changes the Oregon property tax system from a tax base system, which limits the amount of taxes that can be collected, to a tax rate system that sets the rate at which properties can be taxed. Under Measure 50, increases in assessed values on properties cannot exceed three percent per year.

COOS BAY EMPIRE DISTRICT URBAN RENEWAL REPORT, 1995
The Coos Bay Empire District Urban Renewal Report was prepared by The Benkendorf Associates Corp. in 1995. The Report accompanies the Coos Bay-Empire District Urban Renewal Plan. The plan area was once part of the City of Empire but is now incorporated into the City of Coos Bay. It includes 271.3 acres of the city's west side and includes the historic downtown of the City of Empire and much of the city's western shoreland. Approximately 30 percent of land within plan boundaries is vacant or underutilized. Land uses are primarily retail and service commercial and single-family residential. The Empire District Urban Renewal Plan is one of three urban renewal projects within the City of Coos Bay. The Coos Bay Urban Renewal District and the County Urban Renewal District, together with the Empire District Urban Renewal Plan cover 2,272 acres, or 22.2 percent of the city's land area.
Land use planning for the Urban Renewal District allows for three primary uses: commercial, residential and industrial. Fifty-one percent of the area is planned for commercial use. The waterfront adjacent to the primary commercial area is planned for industrial. Though a major industrial site in the Urban Renewal District has been prepared for use, it has not been developed. The waterfront area from Noble Avenue south is planned for commercial uses on the bay front side of Empire Boulevard. Land fronting Newmark Avenue and Ocean Boulevard is planned for commercial uses. Areas bordering commercial districts are designated for high-density residential. Low-density residential makes up areas farther from the commercial districts.

The Urban Renewal Plan identifies the following as blighting conditions:

- vacant and underutilized land;
- deteriorated and vacant structures;
- unimproved public street rights-of-way; and
- sanitary sewer structural, capacity, and infiltration problems.

Over 80.5 acres of the area, or 45 percent of the available developable property, is vacant. The largest amount of vacant acreage is along Empire Boulevard and the waterfront. Much of the land was the site of major lumber mill, which has been closed and demolished. Small lots in the commercial area from Empire Boulevard east to Main Street are vacant. Larger undeveloped parcels are located off of Newmark Avenue on Main Street, Ackerman Avenue, and Norman Avenue.

Deteriorated or vacant residential and commercial structures are located throughout the district. There are 4,400 linear feet of unimproved public street rights-of-way, mostly adjacent to Newmark Avenue on Schetter; Main, Salmon, and Woolridge Avenues. Sanitary sewer problems exist along Ocean Boulevard also elsewhere.

The Urban Renewal District was selected to provide a more attractive shopping and living environment for the Empire District by improving the appearance of the commercial areas and redeveloping bay front properties for commercial and recreation uses and by providing visual access to the bay. The plan attributes blighting conditions with the low level of private investment in the area.

The plan recognizes that the commercial districts have significant development potential. Plan recommendations include:
- rezone the area south of Michigan Avenue to allow uses that enhance the visual and recreational potential of this section;
- improve public streets and sidewalks in the low-density residential area;
- change zoning for the area east of Empire Boulevard, which contains larger homes of historic interest, from Commercial to Residential; and
- change zoning on the waterfront from industrial to commercial and commercial recreation.

The Empire District Urban Renewal Plan and Report include the following proposed projects, phased for development in five-year increments:

Bay Area Comprehensive Economic Analysis

April 30, 1998
Phase I 1996-2000
- Create theme gateways on Empire Boulevard and Newmark Avenue and Ocean Boulevard.
- Clean up beach area along Empire Boulevard.
- Improve traffic management for two blocks of Newmark Avenue.
- Develop a park and accompanying monument at waterfront.
- Formalize a theme and provide funds to implement.
- Establish a Housing Rehabilitation Program.

Phase II 2000-2005
- Rehabilitate existing pier as a boardwalk.
- Improve traffic management for two blocks of Newmark Avenue.
- Landscape Empire Boulevard.
- Provide information sign at intersection of Empire Boulevard and Newmark Avenue.
- Improve sidewalks on Wall Street and Cammann Avenue.
- Provide additional funds to Housing Rehabilitation Program.

Phase III 2005-2016
- Develop a viewing area and restroom facility on Empire Boulevard.
- Develop an RV parking lot on Newmark Avenue.
- Provide an information kiosk and garden at the intersection of Newmark Avenue and Empire Boulevard.
- Acquire property for development of a new motel.
- Continue rehabilitation of the existing pier/boardwalk.
- Make additional street and sidewalk improvements to Mill, Michigan and Newmark Avenues.

Estimated year of completion: 2016

Tax increment financing is expected to be the primary source of funds for proposed projects. Other funding sources include the following:
- state funds for eligible projects, such as boat ramp and street improvements;
- Community Development Block Grants for waterfront improvements and housing rehabilitation program;
- tax increment bonds; and
- general obligation bonds

Total costs in 1995 dollars: $3,735,300.
Total costs with an estimated inflation rate of 5 percent, and contingency and design expenses of 25 percent (Plan assumptions): $9,910,124.

Analysis
The Urban Renewal Plan emphasizes improvements in physical environment to encourage commercial development. No provisions are made for industrial development within the plan area. The Report does not acknowledge or address conflicts with the CBEMP.
The Urban Renewal District includes two shoreland segments covered in the CBEMP:

- Segment 54 UW covers the northern section of shoreland within the Urban Renewal District. The segment is to be managed for water-dependent uses, including commercial, dryland moorage, industrial, land transportation, and recreation. Only temporary non-water-dependent uses are allowed. Uses that support barging and fishing that existed at time of CBEMP adoption, and similar uses, are particularly encouraged. Improvements are allowed for a boat ramp within the segment and associated facilities can be developed for public recreation.

- Segment 55 UD covers the southern section of shoreland within the Urban Renewal District. The segment is to be managed to allow a mix of commercial and residential uses. Non-water-dependent uses are allowed. Allowed uses include: commercial, industrial, and land transportation. Recreation uses must conform with provisions for recreation outlined in Segment 55B. All uses must comply with Policy 23 requiring protection of riparian vegetation.

Management objectives outlined in Segment 54 UW allow for recreation use, but give priority to water-dependent industrial and commercial uses. It is unclear if development of the area for recreation would be permitted without compliance with the expressed management objectives of the CBEMP.

The Urban Renewal Plan relies on tax increment financing to fund the bulk of projects proposed within the plan.

Similar to the City of Coos Bay Urban Renewal Plan, the Coos Bay Empire District Urban Renewal Plan is a phased project, so impacts and benefits of improvement projects will likely be gradual and may not appeal to potential developers. The proposed tax rate for the Urban Renewal Plan is $28 per $1,000 of assessed value. However, the property tax limitations of Ballot Measures 5 and 50 could severely limit the City of Coos Bay's ability to finance implementation of the Empire District Urban Renewal Plan.

**COOS BAY URBAN RENEWAL PLAN AMENDMENTS, 1994**

The Coos Bay Urban Renewal Plan Amendments provide a list of budget amendments and new projects to be incorporated into the Plan. Budget amendments are shown in Table 3-5, and new projects are listed in Table 3-6.

**Table 3-5**

<table>
<thead>
<tr>
<th>Project</th>
<th>Previous cost est.</th>
<th>New cost est.</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Boardwalk</td>
<td>$750,000</td>
<td>$1,500,000</td>
<td>$750,000</td>
</tr>
<tr>
<td>Mall canopy removal</td>
<td>700,000</td>
<td>500,000</td>
<td>(200,000)</td>
</tr>
<tr>
<td>Revolving loan fund for</td>
<td>500,000</td>
<td>700,000</td>
<td>200,000</td>
</tr>
</tbody>
</table>
building improvements

Total $750,000

Analysis

The amendments build logically upon the projects outlined in the original Coos Bay Urban Renewal Plan. Emphasis is given to improvements to infrastructure, the physical condition of the area, and maintenance of city services while increasing the number of facilities to serve residents and tourists.

Amendments to the Urban Renewal Plan allow the City to use a variety of revenue-raising techniques including issuance of general obligation bonds. This could enable the city to minimize the effects of property tax limitation placed on it by Measure 5. However, if the City attempts to circumvent the effects of Measure 5, they could create further disincentives to development by increasing the cost of land in the city relative to other land available in other areas.

TABLE 3-6
NEW PROJECTS FOR THE COOS BAY URBAN RENEWAL PLAN

<table>
<thead>
<tr>
<th>Project</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Waterfront</td>
<td></td>
</tr>
<tr>
<td>- Parking structure</td>
<td>$500,000</td>
</tr>
<tr>
<td>- Rest area for Boardwalk visitors</td>
<td>46,000</td>
</tr>
<tr>
<td>- Reconstruction of Front Street from Market to Hemlock</td>
<td>300,000</td>
</tr>
<tr>
<td>- Acquire property and construct a boat ramp in Cedar area and Front Street</td>
<td>135,000</td>
</tr>
<tr>
<td>Downtown</td>
<td></td>
</tr>
<tr>
<td>- Construct Tourist Information Center</td>
<td>300,000</td>
</tr>
<tr>
<td>- Acquire land and build City Library expansion</td>
<td>3,000,000</td>
</tr>
<tr>
<td>- Acquire land and build new City Fire Station</td>
<td>1,412,500</td>
</tr>
<tr>
<td>- Acquire land and build a parking structure</td>
<td>800,000</td>
</tr>
<tr>
<td>- Replace and repair sidewalks</td>
<td>230,000</td>
</tr>
<tr>
<td>- Additional removal of mall canopies</td>
<td>200,000</td>
</tr>
<tr>
<td>Utilities and Transportation</td>
<td></td>
</tr>
<tr>
<td>- Open First Street to connect with Hwy 101, with signalization</td>
<td>300,000</td>
</tr>
<tr>
<td>- Develop or maintain streets as recommended by Bay Area Transportation Study and Overlay Plan</td>
<td>1,000,000</td>
</tr>
<tr>
<td>- Rebuild Front Street from Market to Hemlock</td>
<td>300,000</td>
</tr>
<tr>
<td>Total Cost</td>
<td>$7,119,500</td>
</tr>
</tbody>
</table>
NORTH BAY URBAN RENEWAL PLAN

The North Bay Urban Renewal Plan was developed as part of ongoing efforts at economic development in the North Bay area in response to worsening economic conditions in the area. The plan was developed under the authority of an Urban Renewal Agency comprising local elected officials and a representative of the Oregon International Port of Coos Bay. The plan outlines a series of projects for encouraging economic development of the North Bay area.

The North Bay Urban Renewal District includes most of the North Spit south of the Oregon Dunes National Recreation Area and a small portion of the North Bend shoreline (a portion of land on the North Spit was excluded at the request of the Confederated Coos, Umpqua and Suislaw Indians). The Urban Renewal District includes 4,643 land acres and 4,366 water-covered acres, mostly within unincorporated Coos County. At the time of plan adoption only four percent of land within the district was being used, although some vacant lands were being used as informal recreation areas. Most of land is designated for water-dependent uses by the CBEMP.

In the early 1980s, preceding the Urban Renewal Plan, portions of the North Bay area were designated as a state Enterprise Zone and smaller portions were designated as a federal Foreign Trade Zone. Enterprise zones are designated for 10 years in areas of economic hardships. They provide new and expanding businesses (under certain conditions) with property tax exemptions and the exemption of some local development-related fees. The Foreign Trade Zones allow importation of goods and materials for storage, assembly or manufacture for shipping to other counties without US import duty or excise taxes. US taxes and duties apply only when goods enter the US from the zone.

The goals of the Urban Renewal Plan are to:

- eliminate blight and its causes;
- stimulate development of industry, while supporting commercial businesses and recreation facilities by the private sector;
- create long-term employment opportunities; and
- increase the county’s taxable assessed value.

The plan identified the following issues that hindered economic development in the North Bay area:

- lack of access to the area by roads and rail;
- lack of sewer;
- inadequate water supply; and
- sufficient electrical service, but not enough to expand to meet additional demand if the area was to develop.

Projects within the Urban Renewal Area emphasize increasing the availability and capacity of infrastructure serving the area. These projects are to be constructed only if they area needs to support committed private industrial development, not as an incentive for attracting industry to North Bay.

Urban Renewal Projects:

- North Bay Industrial Parkway
• North Bay Industrial Parkway Extension
• Export/Import Wharf
• Railroad Extension
• Access Roads
• Widening of the Haynes Inlet Bridge (on Highway 101) and Jordan Cove Bridge (on Jordan Cove Road)

Analysis
The North Bay Urban Renewal Plan is a phased project to be implemented from 1988 through 1997. Projects are related to improving infrastructure in the north and central portions of the North Spit. Urban Renewal projects include: road and rail bed extensions and improvements, construction of sewer treatment facility, increased wastewater capacity and increased water capacity. The plan also includes provisions for the development of a marshaling yard and mitigation of impacts related to implementation of the plan.

The plan provides guidance on the type of improvements that need to be made and prioritizes those projects. It addresses the serious limitations on infrastructure in the area. The plan also avoids overextending the fiscal resources of the local jurisdictions by deferring improvements until they are in demand. The structure and approach of the plan focuses on the potential for attracting large-scale enterprises (in terms of physical size and production output). This focuses efforts on stimulating the greatest amount of job growth.

The plan does not provide an analysis of the demand for ESWD lands in the Bay Area, in general, or North Bay specifically. It is unclear from the plan if the only hindrances to development in the area are related to infrastructure. An analysis of the current (at time of plan adoption) demand for land within the Bay Area would offer a clearer indication of the relative attractiveness of North Spit property if it has necessary infrastructure.

The economic development approach favors recruitment of large-scale enterprises. The plan would also support the expansion of existing large-scale enterprises. This approach is attractive given the economic conditions of the areas but it risks diverting attention from other economic strategies that support development and retention of new and existing locally-based businesses. Locally-based businesses are often smaller in scale than outside-held enterprises, but when taken together, these businesses often employ a greater amount of the workforce than larger enterprises.

The plan only briefly addresses problems with the area's overland transportation system. Though local government agencies may have limited power to make necessary repairs to state-owned and maintained roads, deficiencies in these systems can have serious implications for the economic development of the area.
NORTHBAY URBAN RENEWAL PLAN REPORT

The North Bay Urban Renewal Plan Report describes the economic conditions that lead to the creation of the North Bay Urban Renewal Plan, the components of the plan and the methods for implementing the plan. The North Bay Urban Renewal District includes most of the North Spit south of the Oregon Dunes National Recreation Area and a small portion of the North Bend shoreline (a portion of land on the North Spit was excluded at the request of the Confederated Coos, Umpqua and Suislaw Indians). The North Bay Urban Renewal Plan was developed in response to worsening economic situation in the North Bay area. At the time of plan adoption only four percent of land within the district was developed. Industrial and recreation uses made up the largest amount of developed land.

The report provides budgetary information for the Urban Renewal Plan. The total expenditures for the project are estimated at $31,429,000 (in 1986 dollars). The plan would be implemented through the issuance of bonds which would be repaid through the increase in property tax revenue resulting from increased development in the Urban Renewal District.

The Urban Renewal Report uses information provided by the Coos Curry Douglas Business Development Corporation in a 1981 report to examine existing and potential future market conditions for the area’s largest industrial sectors. This analysis of potential market conditions was used to create a scenario on which to base projections for potential development within the North Bay Urban Renewal District.

Analysis

The report provides an analysis of the current and projected market demand for land in the Bay Area for resource-based industries that have traditionally been the base of the area’s economy and reflects upon the area’s competitive advantages. The report acknowledges discrepancies between economic forecasts developed by the CCD Business Development Corporation and the State of Oregon Employment Division.

The report indicates, directly or indirectly, two key issues related to the economic hardship experienced in the area: lack of infrastructure and changes in the demand and availability of the area’s resource-related goods. There is little other analysis to examine other issues such as tax structures, legal and land use difficulties, shifts in technologies in key industries, change in workforce needs, to indicate if these or other issues may have contributed to the area’s decline or have hindered the area’s economic recovery.

OREGON INTERNATIONAL PORT OF COOS BAY STRATEGIC BUSINESS PLAN, 1997

The plan provides a comprehensive review of the Port’s operations, an analysis of relevant market trends and a detailed set of strategies for increasing the profitability of port operations. Within the plan the Port outlines its mission, critical success factors, and goals for five aspects of Port operation. Goals are provided for the areas of maritime commerce, industrial development, resource management, Charleston development and transportation.
The plan provides an economic and demographic overview that indicates that employment in manufacturing will continue to decline, while employment in retail and service sectors will increase. According to the findings of the plan, the area experienced a drop in population during the 1980s in all age categories except persons aged 65 years and older. The high school graduation rate of Coos County residents has consistently lagged behind the average graduation rate for the state.

Currently the Port’s cost centers are experiencing a negative cash flow, contributing to an increasing reliance of the Port upon tax revenues. In addition, given the medium- and high-growth scenarios described in the plan, demand for industrial land within the Port is anticipated to be relatively low (1.4 to 3.2 acres annually).

The plan provides a variety of strategies for improving the Port. These strategies include:
• improving terminal facilities;
• maintaining access to natural resources;
• promoting the development of ESWD and non-ESWD land (including redesignating some ESWD land);
• expanding tourism revenues;
• marketing the Bay Area;
• improving infrastructure;
• coordinating efforts with local government and industry; and
• advocating improvements in state road systems.

Analysis
The plan provides a thorough overview of existing conditions at the Port and in the local and regional economy, examining economic development issues from a variety of perspectives. The plan outlines a broad base of strategies for the Port to implement and opportunities for the Port to capitalize on. The comprehensive nature of the plan is its primary strength. It provides the Port and community leaders with data and analysis that can be used to determine a course of action that is most effective.

The plan implies an over-supply of industrial land in the area. Projected demands for industrial property indicate that even with high job growth, demand for industrial land would be modest. This may indicate that strategies focused on recruitment of large industries may be less effective than other strategies for improving the economic conditions of the area (e.g., diversification).

Bay Area Transportation Study, December 1995
The Bay Area Transportation Study (BATS) (CH2M Hill and Kittelson & Associates, 1995) was initiated in 1993 to develop a regional transportation system plan for the Bay Area. A team representing the Cities of Coos Bay and North Bend, Coos County, Oregon International Port of Coos Bay, and Oregon Department of Transportation (ODOT) managed the planning effort. The final document was intended to provide local jurisdictions with a policy and technical basis for later developing and adopting local transportation system plans, as required by the state’s Transportation Planning Rule. The study also

April 30, 1998
identifies major improvement needs in the transportation system to handle projected growth for the next 20 years.

To evaluate alternatives, the BATS uses project goals and guiding principles, developed from information gained through a public opinion survey and a review of transportation policy documents. Goals and guiding principles, addressing general and specific transportation issues, are provided for each transportation mode within the system.

The BATS assumed an average annual population growth rate of 1 percent and annual employment growth of 1.2 percent for the planning period of 1992 to 2015. The study also assumed that population, housing, and employment distribution would follow past patterns of growth. The transportation model assumed no significant development along the North Spit, because considerable land zoned for industrial development exists elsewhere.

**Existing Facilities and Proposed Improvements**

**Road System.** An estimated 19 percent increase in local traffic volume and a 34 percent increase in through traffic volume is anticipated by 2015. If no improvements are made, traffic will be near, at, or over capacity in 2015 in the following locations:

- Oregon Coast Highway (US 101)
  - McCullough Bridge to Florida Avenue near capacity
  - Kruse Avenue to Coos River Highway near capacity

- Cape Arago Highway (Highway 240)
  - Fir Street to Empire-Coos Bay Highway at capacity

- Empire-Coos Bay Highway (Highway 243)
  - Central Avenue to 10th Street over capacity

- Coos River Highway (Highway 24)
  - US 101 to Olive Barber Road over capacity
  - Olive Barber Road to D Street over capacity
  - D Street to Ross Slough Road near capacity

The study recommends improvements to the state highways to alleviate congestion. This study did not identify any capacity-related deficiencies on the local arterial and collector system, although congested state highways may force traffic onto these non-state-system roads.

**Port of Coos Bay.** The Port includes 18 marine terminal facilities, 14 with deep draft capacity. Terminal facilities include 150 acres of open storage and more than 600,000 square feet of covered storage. Facilities handle wood chips, logs, finished wood and paper products, and petroleum. The Port has identified the following challenges that limit development and full utilization of Port facilities:
• need for dependable rail service;
• limited availability of fully serviced commercial and industrial sites and developable industrial property. (Environmental and political problems, as well as zoning limitations, have prevented development of the North Spit area. Without revenue from contracted clients the Port cannot provide needed infrastructure improvements, and without infrastructure improvements the Port cannot attract contracting clients.);
• need for 24-hour harbor use; and
• lack of coordination among Port users and property owners.

Rail. A single railroad serves the area, with a track that follows US Highway 101. It was recently purchased by a short-line service provider. The system requires improvements because of deferred maintenance.

North Bend Airport. The airport accommodates commercial passenger travel, air freight services, and the US Coast Guard. The facility is large enough to handle the projected growth in population, but airport facility upgrades are needed. (See section in this memorandum addressing the North Bend Municipal Airport Master Plan.)

Public Transit. The Bay Area provides dial-a-ride services for the elderly and handicapped. The 1992 Oregon Transportation Plan identified the need for expanded transit service in the Coos Bay/North Bend area. The bulk of the current transit budget is made up of government subsidies (85.7 percent) with the remaining coming from service contracts (8.1 percent) and farebox revenue (6.2 percent).

Pedestrian Needs. Improvements are needed for sidewalks in North Bend, Coos Bay, and urban areas within Coos County. The county does not require sidewalks in urban areas such as Empire and Bunker Hill, except on arterials and collectors.

Pipeline. The area lacks a natural gas pipeline, which limits industrial growth opportunities. A major client for natural gas would be needed to offset the cost of providing gas. Because no potential client exists at this time, there is no plan for the provision of these services.

Implementation and Coordination of Study Recommendations
Because most of the deficiencies in the transportation system occur along state roads, the BATS recommends that ODOT play a key role in plan implementation. The study also emphasizes the importance of regional and intergovernmental coordination to:
• address financing issues;
• review and revise street and sidewalk standards to make them consistent;
• consider a regional gasoline tax to help finance needed improvements;
• work together to secure funding for North Bend Airport improvements; and
• look for ways to build a gas pipeline.

Financing
The costs for recommended improvements are as follows:

April 30, 1998
McCullough Bridge improvements account for $60,000,000 of proposed improvements. The study recommends that the County provide some financial assistance for some improvements within the cities of North Bend and Coos Bay.

Improvement costs are to be paid primarily by the state; with proposed local revenues to come from system development charges (SDCs), a regional gas tax, a bridge toll, and general obligation bonds. The study also suggests applying for state economic development grants.

Analysis
By the year 2015, parts of the state highway system in the Bay Area will be experiencing congestion. Most of the highway traffic will be passing through the area, although increased development in the area will add local traffic. The BATS identifies approximately $180 million in needed improvements, $60 million of which are for improvements to McCullough Bridge.

The BATS recommends the use of SDCs and a local gas tax to fund much of the needed improvements. Both SDCs and gas taxes link system use with revenue-raising efforts—much of the costs associated with improvements would be paid by users of the transportation system. These revenue collecting measures would decrease reliance on outside funding sources. However, SDCs are typically used in areas experiencing high development activity, and their use is restricted to funding expansion projects only, not improvements. (Revenue from gas taxes do not have this same restriction.) Currently the Bay Area is experiencing relatively little development. SDCs would increase the cost of development in the Bay Area and may act as a disincentive to development. On the other hand, reliance on state funding for state highway improvements could be problematic, given the current lack of willingness of the state legislature to provide increased funding for ODOT to pay for needed highway improvements.

Under existing funding constraints, it will be difficult to finance the needed improvements. It is important, therefore, that the Cities of North Bend and Coos Bay coordinate with Coos County and the State of Oregon to improve efficiency of the existing system. It is also important to evaluate growth plans in relation to the transportation system.

NORTH BEND MUNICIPAL AIRPORT MASTER PLAN
The North Bend Municipal Airport serves the Bay Area. The airport is located at the north tip of land bordered by the main channel of Coos Bay, approximately 1.5 miles west of Highway 101. Access to the airport is provided from Highway 101 via Virginia Avenue, a primary east-west arterial, and Maple Street, which accesses the airport terminal area. East and West Airport Way, which provide access to the terminal area and other facilities located along the west side of the terminal area and other facilities
located along the west side of the airport, connect to Maple Street. Pony Point Road provides access to the eastern side of the airfield.

North Bend Municipal Airport has a single commercial air carrier: Seattle-based Horizon Airlines. Horizon provides scheduled passenger and freight service to and from Portland, Oregon. In the past, commercial service was also available to Eugene, Oregon, and Crescent City and San Francisco, California. These routes are no longer in operation. The airport also receives regular cargo/express service with Federal Express, Pony Express, and United Parcel Service.

The North Bend Municipal Airport Master Plan was prepared in May 1997 by David Evans and Associates, Inc., and David Miller & Associates. The plan identifies several facilities that will require "minor to significant" upgrading in order to accommodate projected levels of activity. Key issues identified were:

- Existing terminal facilities are located in a congested area, having inefficient surface access. Surface access needs improvement.
- Due to its age (approximately 30 years) and configuration, the terminal building needs renovation and/or expansion to accommodate projected facility demands.

Relationship to Economic Development of the Bay Area

Because air travel and freight are important for tourism, shipping, and other business, improvements to the North Bend Municipal Airport, as identified in the Airport Master Plan, will be important for the Bay Area's economic future. If airport facilities are not improved, it is unlikely that the airport will be able to accommodate forecast demand and the Bay Area may not remain economically competitive.

STATEWIDE PLANNING GOAL 8: RECREATIONAL NEEDS

"To satisfy the recreational needs of the citizens of the state and visitors and, where appropriate, to provide for the siting of necessary recreational facilities including destination resorts."

Requirements

The goal requires governmental agencies having responsibility for recreation areas, facilities and opportunities to plan for meeting recreation needs:

- in coordination with private enterprise;
- in appropriate proportions; and
- in such quantity, quality, and locations as is consistent with the availability of the resources to meet such requirements.

State and federal plans must be coordinated with local and regional recreational needs and plans.

The goal also contains requirements for siting destination resorts, addressing eligible areas, siting standards, and implementing measures. County comprehensive plans may provide for siting of destination resorts (which are defined in the Goal) on rural lands subject to Goal 8 provisions. Small resorts may be allowed on lands where there has been an exception to Statewide Planning Goals 3
(Agricultural Lands), 4 (Forest Lands), 11 (Public Facilities and Services), or 14 (Urbanization), but large resorts may not. To provide for a destination resort, the county must map eligible areas (according to Goal 8 provisions) and adopt the map.

**Guidelines**

When planning for recreation, jurisdictions are encouraged to inventory recreation needs and opportunities in the planning area, and to coordinate with all relevant agencies and with private interests. When planning for lands and resources capable of accommodating multiple uses, jurisdictions should include provision for appropriate recreation opportunities. Priority should be given to areas, facilities, and uses that meet recreational needs for high-density population centers, persons of limited mobility and finances, and visitors to the state; minimize environmental impacts; and are available to the public at nominal cost. Planning should also consider energy consequences and the carrying capacity of air, land and water resources. Unique areas capable of meeting specific recreation needs should be inventoried and protected or acquired, and comprehensive plans should give high priority to enhancing recreation opportunities on public waters and shorelands.

Guidelines for resort siting include adopting measures to minimize adverse environmental impacts, particularly in areas subject to natural hazards (e.g., floodplains and steep slopes).

**Implementation**

Goal 8 guidelines for implementation recommend that plans should consider various acquisition techniques other than purchase, e.g., easements, cluster development, preferential assessments, acquisition of development rights, and dedication.

**Analysis**

The purpose of Goal 8 is to ensure the provision of adequate recreation facilities and opportunities to meet the needs of citizens and visitors. The Bay Area offers a variety of opportunities for recreation; three state parks and a national recreation area are located within 10 miles of the study area for this Economic Analysis, and another two state parks are within 20 miles of the study area. The Pacific Ocean and Coos Bay offer additional recreation opportunities. However, the local comprehensive plans do not place much emphasis on the area's recreation opportunities. Recreation facilities and opportunities typically enhance an area, making it more attractive to both visitors and residents. The Bay Area may wish to promote the recreational opportunities available.

Many CBEMP management segments allow recreational uses, though many segments require that recreation uses be water-dependent, and such uses are only conditionally allowed on some segments. Recreational uses are allowed on segments 44 UW and 46 UD, located on the downtown waterfronts of Coos Bay and North Bend. In these areas, recreation amenities could be used in conjunction with other uses to encourage visitation. In accordance with Goal 8 guidelines, the local jurisdictions should continue to enhance recreation opportunities along shorelands (e.g., connect the City of Coos Bay's boardwalk with other recreation facilities). Management segment 47 UW, under and near the Highway 101 bridge in North Bend, and segments 5 WD and 6 WD on the North Spit, do not allow recreational uses. Management segment 3E WD on the North Spit, allows water-dependent recreation uses subject to

*Bay Area Comprehensive Economic Analysis*  
*April 30, 1998*
making necessary findings that the uses comply with Policy 14 of the CBEMP. (CBEMP Policy 14 allows “private and public water-dependent recreation developments.”)

Coos County has one site mapped for resort development. The site is just north of Bandon and was added only recently to the comprehensive plan. Under Oregon land use planning laws, destination resort siting is quite difficult, and Coos County does not anticipate including other destination resort sites in its comprehensive plan, at least in the foreseeable future.

STATEWIDE PLANNING GOAL 9: ECONOMIC DEVELOPMENT

"To provide adequate opportunities throughout the state for a variety of economic activities vital to the health, welfare, and prosperity of Oregon’s citizens."

Requirements

The goal requires comprehensive plans to contribute to a stable and healthy economy. To this end, comprehensive plans must consider the following issues related to economic development:

• health of the current economic base;
• availability and cost of materials and energy;
• labor market factors;
• education and technical training programs;
• availability of public facilities;
• necessary support facilities;
• current market forces;
• location relative to market availability of resources; and
• pollution control required.

Comprehensive plans must provide an inventory of areas suitable for increased growth and provide an adequate supply of sites of suitable sizes, types, and locations for a variety of industrial and commercial uses consistent with plan policies. Also, plans must ensure that proposed uses near industrial and commercial development be compatible with those uses.

Guidelines

When planning for economic development, jurisdictions are encouraged to consider the region’s comparative advantage and support industries based upon this advantage. This type of industry is considered to represent the most efficient use of resources, relative to other geographic areas. Research on economic projections, which a comprehensive plan draws from, should “take into account the availability of the necessary natural resources to support the expanded industrial development and associated populations. The plan should also take into account the social, environmental, energy, and economic impacts upon the residential population.” Expansion and increased productivity of existing industries and firms is encouraged as a means to strengthen local and regional economic development. Plans should also consider the carrying capacity of the air, land, and water resources.
Implementation
When implementing economic development policies, jurisdictions should take into account methods and devices for overcoming certain regional conditions and deficiencies, including land use controls and ordinances, and tax incentives and disincentives.

Analysis
The purpose of Goal 9 is to stimulate land uses “To provide adequate opportunities... for a variety of economic activities...” (emphasis added). The comprehensive plans of Coos County, Coos Bay, and North Bend recognize the Bay Area’s competitive advantage as a harbor with access to natural resources. The comprehensive plans place less emphasis on other competitive advantages of the area, such as scenic resources and proximity to recreation (e.g. state parks). The Bay Area has historically relied heavily on natural resources located nearby, but supplies of those resources are diminishing. Shorelands within the Bay Area are extensively zoned for water-dependent uses. Since water-dependent uses are often resource-based, the plan seems to assume that the area’s economy will continue to be resource-based. Declining availability of timber resources has resulted in the area’s economic decline, and much of the area’s shorelands remain underdeveloped.

Goal 9 guidelines suggest consideration of the level of available facilities and services when creating economic development policies and strategies. Comprehensive plans are required to identify an adequate supply of sites for industrial and commercial development. Local plans generally provide appropriate locations for water-dependent use but do not provide adequate sites served by infrastructure. Though region-wide, there are numerous industrial sites, the City of Coos Bay has very little land zoned for, and suitable for, intensive industrial development.

Goal 9 guidelines encourage urban areas to expand existing uses. The CBEMP relies heavily on this economic development strategy. The CBEMP has few provisions aimed at diversifying economic activity in response to the area’s declining resource base.

STATEWIDE PLANNING GOAL 11: PUBLIC FACILITIES AND SERVICES
“To plan and develop a timely, orderly and efficient arrangement of public facilities and services to serve as a framework for urban and rural development.”

Requirements
The goal requires cities and counties to develop facilities plans. Urban and rural development are to be guided and supported by types and levels of public facilities and services “appropriate for, but limited to,” the needs and requirements of the urban and rural areas to be served. Counties are not allowed to establish new sewer systems outside urban growth boundaries.

Guidelines
Goal 11 recommends that public facilities be coordinated with plans designating urban boundaries. When determining future needs for public facilities, jurisdictions should consider the time required to
provide services, reliability, financial cost, levels of service needed or desired, and the carrying capacity of air, land, and water.

**Implementation**

Goal 11 states that the levels of facility service should be considered a principle factor in planning land uses.

**Analysis**

The purpose of Goal 11 is to encourage efficient uses of resources by limiting growth, and providing infrastructure and resources to the areas that are most appropriate for development. The goal mandates facilities planning, with the understanding that planning for facilities is part of a process needed for understanding the costs and other implications of land use decisions. Infrastructure is used as a framework for development, instead of development determining the need for infrastructure.

The CBEMP, adopted in 1984, designates land for industrial use, some of which still lack services 13 years later. The CBEMP does not include a component that addresses facilities needs. As a result, the cost of implementing CBEMP designations is unclear. With local jurisdictions each taking responsibility for implementing their piece of the CBEMP, the overall cost of providing infrastructure to CBEMP segments is not readily available and financial impact is not known.

The CBEMP segments zoned for industrial development, but lacking facilities, are outside the UGBs of Coos Bay and North Bend. These zoning designations may be in conflict with Goal 11.

**STATEWIDE PLANNING GOAL 12: TRANSPORTATION**

"To plan and develop a timely, orderly and efficient arrangement of public facilities and services to serve as a framework for urban and rural development."

Under Goal 12, cities and counties are required to develop transportation plans to minimize adverse social, economic, and environmental impacts and costs; conserve energy; and facilitate the flow of goods and services to strengthen the local and regional economy.

**Guidelines**

In order to make the most efficient use of federal, state, and local funds, transportation systems should be planned to make the most use of existing facilities.

**Implementation**

Transportation facilities in rural areas should be developed to discourage urban growth while providing transportation service necessary to sustain rural and recreational uses.
Analysis

Developing industrial areas outside the Coos Bay or North Bend UGB would require a significant investment in transportation and could stimulate a development pattern inconsistent with urban growth regulations. The budgetary capacity of Bay Area jurisdictions could be limited if new transportation projects serving areas with limited traffic sources are initiated. Expensive transportation projects could divert available funds away from needed economic development projects.

STATEWIDE PLANNING GOAL 14: URBANIZATION

"To provide for an orderly and efficient transition from rural to urban land use."

Requirements

Goal 14 requires the establishment of urban growth boundaries (UGBs) to separate urbanizable land from rural land. The following factors must be considered when establishing UGBs and the results of such consideration must be included in the comprehensive plan:

- Demonstrated need to accommodate long-range urban population growth requirements consistent with LCDC goals;
- Need for housing, employment opportunities, and livability;
- Orderly and economic provision for public facilities and services;
- Maximum efficiency of land uses within and on the fringe of the existing urban area;
- Environmental, energy, economic, and social consequences;
- Retention of agricultural land (highest priority for Class I soils; lowest for Class VI soils); and
- Compatibility of the proposed urban uses with nearby agricultural activities.

Proposed changes to an UGB require an exception to Statewide Planning Goal 2. Proposed changes also require cooperation between the city and county that surrounds it.

Undeveloped land within the UGB shall be considered available over time for urban uses. Conversion of urbanizable land to urban uses shall be based upon consideration of:

- Orderly, economic provision for public facilities and services;
- Availability of sufficient land for the various uses to ensure choices in the marketplace;
- Provisions of the acknowledged comprehensive plan (or LCDC goals); and
- Encouragement of development within urban areas before conversion of urbanizable areas.

Outside UGBs in unincorporated communities, counties are allowed to approve uses, public facilities, and services more intensive than those allowed by Goals 11 (Public Facilities and Services) and 14 either by exception to those goals or by ensuring that such development does not adversely affect agricultural or forest operations nor interfere with the efficient functioning of UGBs.

Guidelines

Jurisdictions are encouraged to designate, in their comprehensive plans, sufficient amounts of urbanizable land (i.e., vacant or underutilized land within the UGB) to meet needs for further urban
expansion. To determine land needs, jurisdictions should consider the area's growth policy, needs of the forecast population, the planning area's carrying capacity, and open space and recreational needs. Parcels designated as urbanizable should be "of adequate dimension so to maximize the utility of the land resource and enable the logical and efficient extension of service to such parcels." Cities and counties should also consider environmental effects of urbanizing rural areas, i.e., the development provided for in local plans should not exceed the carrying capacity of the air, land, and water resources of the planning area.

**Implementation**

In directing urban expansion, jurisdictions should consider public facilities and services, as well as transportation facilities (i.e., the type, location, phasing, and design of such facilities). Local land use controls and ordinances should support provision of such facilities and services to accommodate increased public demand as areas urbanize. Jurisdictions are encouraged to use financial incentives, capital improvement programming, multiple use and joint development practices, and various acquisition techniques to guide urban land use, and to provide financial incentives to help maintain the use and character of lands adjacent to urbanizable areas. The roles and responsibilities of appropriate government agencies should be assigned.

Jurisdictions are required to manage and control land uses so as to maximize the conservation of all forms of energy, based on sound economic principles.

**Analysis**

In the Bay Area, any proposed changes to the UGB of Coos Bay or North Bend would require coordination with Coos County. Because Coos Bay and North Bend abut one another, changes to the UGB boundary between the cities also would require coordination between them. In addition, the affected local governments would have to prepare findings in accordance with the exception requirements of Goal 2 (Land Use Planning).

Should local jurisdictions desire to approve urban uses, or public facilities or services outside the UGB in an unincorporated community (e.g., Bunker Hill) either an exception to Goal 11 and 14 or findings that the development would not adversely affect resource operations will be required.

Development of urbanizable areas, such as the North Spit, would require consideration of the four points included in Goal 14, i.e., orderly and economic provision of public facilities and services; availability of sufficient land for various land uses; goals and policies in local comprehensive plans; and encouraging development in urban areas prior to converting urbanizable areas. Business development strategies to encourage redevelopment of older commercial and industrial buildings and sites, and to support existing urban renewal programs and plans (included in the Bay Area's economic development vision) are consistent with this goal. Extension of public facilities and utilities (e.g., water, electricity, sewerage, natural gas, and transportation facilities) would need to occur in a manner consistent with Goal 14.
STATEWIDE PLANNING GOAL 16: ESTUARINE RESOURCES

“To recognize and protect the unique environmental, economic, and social values of each estuary and associated wetlands; and

To protect, maintain, where appropriate develop, and where appropriate restore the long-term environmental, economic, and social values, diversity and benefits of Oregon’s estuaries.”

Requirements

The goal mandates that comprehensive management programs be developed by appropriate local, state, and federal agencies for all estuaries. Agencies are required to specify the most intensive level of development or alteration allowed within each estuary. Comprehensive plans are required to provide for appropriate uses within an estuary and place limits on activities to protect estuarine ecosystems.

The goal sets the following priorities for uses within estuaries:
- uses which maintain the integrity of the estuarine ecosystem;
- water-dependent uses requiring an estuarine location;
- water-related uses which do not degrade or reduce the natural estuarine resources; and
- non-dependent, non-related uses which do not alter, reduce, or degrade estuarine resource and values.

Comprehensive plans are required to classify the estuary into management units, establish policies and use priorities for each management unit, and consider and describe the potential cumulative impacts of the alterations and development activities envisioned. Management units are classified into three categories: natural, for the protection of fish and wildlife habitats; conservation, for preservation; and development, for more intense development or alteration. Development of estuary management units requires consideration for adjacent upland characteristics and existing land uses, and compatibility with adjacent uses.

Management units with development classifications are deep-water areas adjacent to or in proximity of the shoreline, navigational channels, subtidal areas for disposal of dredged material, and areas of minimal biological significance. A variety of water-dependent uses are allowed in these areas. Non-water-dependent uses are also allowed in these areas if these uses require no dredging or fill and are consistent with the purposes of the management unit and adjacent shorelands designations.

Implementation

Actions within management areas are allowed after a clear presentation of the impacts of the action. Dredging and/or filling of areas is allowed under specified conditions.

Guidelines

Jurisdictions are required to inventory each estuary’s physical characteristics, biological characteristics, and social and economic characteristics. Social and economic characteristics include the location, description and extent of:
- the importance of the estuary to the economy of the area;
- existing land uses surrounding the estuary;
• human-made alterations to the natural estuarine system;
• water-dependent industrial and/or commercial enterprises;
• public access;
• historical or archaeological sites; and
• existing transportation systems.

The goal supports the development of historic, unique, and scenic waterfront communities, stating that, "Local government comprehensive plans should encourage the maintenance and enhancement of historic, unique, and scenic waterfront communities, allowing for non-water-dependent uses as appropriate in keeping with such communities."

Analysis

The complexity of the CBEMP appears to be in response to the requirements of Goal 16. The CBEMP incorporates goal requirements and recommendations. Land uses are prioritized in a manner consistent with guidelines provided in Goal 16.

Bay Area plans do not take advantage of the goal’s provision for “historic, unique, and scenic waterfront communities.” Instead, the CBEMP and other plans emphasize development of water-dependent uses, particularly water-dependent industrial use. This approach is consistent with the requirements and recommendations of Goal 16, but a broader interpretation could encourage a more diversified economic base in the Bay Area.

Analysis of the CBEMP inventory could provide an understanding of the rationale for designations given to CBEMP management segments. Without this type of analysis it is unclear if more intensive levels of commercial or industrial development or alteration could be appropriate for management segments within the CBEMP.

STATEWIDE PLANNING GOAL 17: COASTAL SHORELANDS

"To conserve, protect, where appropriate, develop and where appropriate restore the resources and benefits of all coastal shorelands, recognizing their value for protection and maintenance of water quality, fish and wildlife habitat, water-dependent uses, economic resources and recreation and aesthetics. The management of these shoreland areas shall be compatible with the characteristics of adjacent coastal waters; and

To reduce the hazard to human life and property, and the adverse effects upon water quality and fish and wildlife habitat, resulting from the use and enjoyment of Oregon's coastal shorelands."

Goal 17 designates most lands west of US Highway 101 and lands within 1,000 feet of estuary shorelands as coastal shorelands. Within the Bay Area, coastal shorelands comprise lands west of Highway 240 and lands within 1,000 feet of the shoreline of the Coos Bay Estuary.

The goal provides the following six general priorities for use of coastal shorelands:
• uses that maintain the integrity of the estuaries and coastal waters;
• water-dependent uses;
• water-related uses;
• non-dependent, non-related uses which retain flexibility of future use;
• non-dependent, non-related uses, in urban areas compatible with existing or committed uses; and
• non-dependent, non-related uses which cause permanent or long-term change in features of coastal shorelands only upon demonstration of public need.

Requirements
Goal 17 requires protection of riparian vegetation to ensure water quality, fish and wildlife habitat, recreational use, and aesthetic resources. Plans regulating coastal shorelands must also encourage public access to shorelands.

Within areas with major marshes and significant wildlife habitat, uses must be consistent with the protection of natural values. Such uses include forest harvesting, grazing, and low-intensity water-dependent recreation. Urban or urbanizable areas considered especially suited to water-dependent (ESWD) use, but irrevocably committed to non-resource use, must be protected for water-dependent recreational, commercial, and industrial uses. Other temporary non-water-dependent uses may be permitted. Plans allow a mix of water-dependent, water-related, and water-oriented non-dependent uses in areas with existing commercial/industrial land not designated ESWD.

Guidelines
Goal 17 includes a provision for stating that historic, unique, and scenic waterfront communities should be maintained and enhanced, allowing for non-water-dependent uses as appropriate in keeping with such communities.

Analysis
The CBEMP implements this goal through Policy 23, which protects riparian vegetation in sensitive shoreland areas. The CBEMP identifies much of the shorelands within the Coos Bay Estuary as requiring protection of riparian vegetation. Most of the management segments designated for urban development are governed by Policy 23. This policy limits the amount of shoreland available for non-water-dependent uses. The CBEMP, and other plans for Bay Area jurisdictions, do not designate areas as having historic, scenic, or unique characteristics warranting non-water-dependent development. This type of waterfront designation could allow a more diversified economic base by stimulating commercial uses that are enhanced by proximity to the waterfront.

Statewide Planning Goal 18: Beaches and Dunes
"To conserve, protect, where appropriate develop, and where appropriate restore the resources and benefits of coastal beach and dune areas; and
To reduce the hazard to human life and property from natural or man-induced actions associated with these areas."
Requirements

The goal requires coastal cities and counties to provide for “diverse and appropriate use” of beaches and dunes in their comprehensive plans and implementing actions. Use of beaches and dunes must be consistent with their ecological, recreational, aesthetic, water resource and economic values, and with the natural development limitations of beaches, dunes, and dune vegetation. Jurisdictions must conduct inventories for identifying and designating uses and policies for beaches and dunes. Based upon the inventories, local comprehensive plans must identify beach and dune areas, and establish policies and uses for such areas consistent with Goal 18 provisions. Establishment of allowed uses must be based on the capabilities of the beach/dune area to sustain development or other uses, and protection of areas of critical environmental concern, significant wildlife habitat, and areas having scenic, scientific, or biological importance as identified through application of Goals 5 (Natural Resources, et al.) and 17 (Coastal Shorelands).

Goal 18 contains numerous implementation requirements to ensure actions and development affecting beaches and dunes meet the goal provisions.

Analysis

The purpose of Goal 18 is to conserve and protect coastal beaches and dune areas, allowing development and restoration of such areas as appropriate. Because the Bay Area jurisdictions intend to focus economic development efforts on lands within the cities’ UGBs and on the inland side of the North Spit (the side fronting the Coos Bay estuary), and do not intend to consider policy or plan revisions or development that would affect coastal beaches or dunes. Therefore, it seems the provisions of Goal 18 will not be applicable to the Bay Area Economic Analysis.
CHAPTER 4: REGIONAL LAND NEEDS PROJECTIONS

METHODOLOGY
The demand for land designated for specific uses is calculated from the results of the market analysis conducted in Phase I (Economic Opportunities Analysis—Chapter 2) which identified public need for those uses. The conversion of housing units to land needs is based on regional development patterns and densities allowable under Bay Area development ordinances. The conversion of space needs to land needs for office-commercial, industrial, and retail-commercial uses is based on average coverage ratios as reported in the Institute of Transportation Engineers’ (ITE) Trip Generation (5th edition). Coverage is the ratio of a building’s floor area to its site area. An example of a 0.5 coverage ratio would be a site with half its area covered by a one-story building.

HOUSING LAND NEEDS
Historically, over 40 percent of the Coos County population lived within the core Bay Area (defined as the cities of Coos Bay and North Bend). Based on the regional development analysis, DEA calculated that at an average of 6 units per acre, the core Bay Area will require approximately 170 acres of land designated for housing development by year 2005, and a total of approximately 350 acres by year 2020, as shown in Table 4-1.

TABLE 4-1
DEMAND FOR LAND DESIGNATED FOR HOUSING

<table>
<thead>
<tr>
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<th>1995-2005</th>
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<th>2006-2020</th>
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<td>Demand for Housing Units</td>
<td>Average Density (d.u. per acre)</td>
<td>Demand for Housing Land (Acres)</td>
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<td>Rest of Coos County</td>
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<td>193</td>
<td>1,566</td>
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<tr>
<td>Total</td>
<td>2,161</td>
<td>360</td>
<td>2,686</td>
<td>810</td>
</tr>
</tbody>
</table>

Table 4-1: Demand for Land Designated for Housing

As shown in Table 4-1, much of the demand for new housing units is expected in the core Bay Area (the cities of Coos Bay and North Bend). These development patterns suggest that other urban portions of the county will require nearly 200 acres of land designated for housing development by year 2005, and approximately 260 acres by year 2020.

BASELINE INDUSTRIAL AND OFFICE-COMMERCIAL LAND NEEDS
Based on the Oregon Employment Department’s projection of nearly 3,200 new non-agricultural positions in Coos and Curry counties between 1996 and year 2006, and an average coverage ratio, DEA converted industrial and office space needs to a need for land designated for industrial and office-commercial uses.
A 25 percent coverage ratio for industrial uses was derived from the ITE's *Trip Generation* (5th edition). The need for land designated for industrial uses is summarized below in Table 4-2.

### TABLE 4-2
**BASELINE DEMAND FOR LAND DESIGNATED FOR INDUSTRIAL USES**
**COOS COUNTY, OREGON**

<table>
<thead>
<tr>
<th>Industry</th>
<th>Demand for Industrial Space (s.f.)</th>
<th>Coverage</th>
<th>Demand for Industrial Land (Acres)</th>
<th>Coverage</th>
<th>Demand for Industrial Space (s.f.)</th>
<th>Coverage</th>
<th>Demand for Industrial Land (Acres)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manufacturing</td>
<td>(161,400)</td>
<td>25%</td>
<td>(14.8)</td>
<td></td>
<td>(206,300)</td>
<td>25%</td>
<td>(18.9)</td>
</tr>
<tr>
<td>TPU</td>
<td>50,000</td>
<td>25%</td>
<td>4.6</td>
<td></td>
<td>(24,500)</td>
<td>25%</td>
<td>(2.2)</td>
</tr>
<tr>
<td>Wholesale Trade</td>
<td>63,100</td>
<td>25%</td>
<td>5.8</td>
<td></td>
<td>27,400</td>
<td>25%</td>
<td>2.5</td>
</tr>
<tr>
<td>Retail Trade</td>
<td>250,800</td>
<td>25%</td>
<td>23.0</td>
<td></td>
<td>171,000</td>
<td>25%</td>
<td>15.7</td>
</tr>
<tr>
<td>FIRE</td>
<td>2,200</td>
<td>25%</td>
<td>0.2</td>
<td></td>
<td>900</td>
<td>25%</td>
<td>0.1</td>
</tr>
<tr>
<td>Services</td>
<td>46,600</td>
<td>25%</td>
<td>4.3</td>
<td></td>
<td>35,600</td>
<td>25%</td>
<td>3.3</td>
</tr>
<tr>
<td>Government</td>
<td>14,000</td>
<td>25%</td>
<td>1.3</td>
<td></td>
<td>5,000</td>
<td>25%</td>
<td>0.5</td>
</tr>
<tr>
<td><strong>Total All Industries</strong></td>
<td><strong>265,300</strong></td>
<td><strong>25%</strong></td>
<td><strong>1.3</strong></td>
<td></td>
<td><strong>5,000</strong></td>
<td><strong>25%</strong></td>
<td><strong>1.3</strong></td>
</tr>
<tr>
<td><strong>Total Long-Term Demand for Land Designated for Industrial Uses (acres)</strong></td>
<td><strong>25</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*TPU*: Transportation, Communications, and Public Utilities  
*FIRE*: Finance, Insurance, and Real Estate

Source: Economic Opportunities Analysis (*Demand for Industrial Space*)

The 265,000 square feet of industrial space needed translates to a need for 24 acres of land zoned for industrial uses, built out at a coverage ratio of 0.25. In the long term, the need for increased industrial space flattens out, with total need of approximately 25 acres, given the coverage ratios and space needs assumptions provided.

Data from ITE's *Trip Generation* also suggest a 25 percent coverage ratio for office uses. Based on employment projected for Coos and Curry counties, need for land designated for office-commercial uses is summarized in Table 4-3.
TABLE 4-3
BASELINE DEMAND FOR LAND DESIGNATED FOR OFFICE USES
COOS COUNTY, OREGON

<table>
<thead>
<tr>
<th>Industry</th>
<th>Office Space (s.f.)</th>
<th>Coverage</th>
<th>Office Land (Acres)</th>
<th>Coverage</th>
<th>Office Space (s.f.)</th>
<th>Coverage</th>
<th>Office Land (Acres)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mining and Construction</td>
<td>12,300</td>
<td>25%</td>
<td>1.1</td>
<td>25%</td>
<td>7,100</td>
<td>25%</td>
<td>0.7</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>(11,900)</td>
<td>25%</td>
<td>(1.1)</td>
<td>25%</td>
<td>(15,200)</td>
<td>25%</td>
<td>(1.4)</td>
</tr>
<tr>
<td>TPU</td>
<td>6,900</td>
<td>25%</td>
<td>0.6</td>
<td>25%</td>
<td>(3,400)</td>
<td>25%</td>
<td>(0.3)</td>
</tr>
<tr>
<td>Wholesale Trade</td>
<td>21,000</td>
<td>25%</td>
<td>1.9</td>
<td>25%</td>
<td>9,100</td>
<td>25%</td>
<td>0.8</td>
</tr>
<tr>
<td>Retail Trade</td>
<td>37,000</td>
<td>25%</td>
<td>3.4</td>
<td>25%</td>
<td>25,200</td>
<td>25%</td>
<td>2.3</td>
</tr>
<tr>
<td>FIRE</td>
<td>50,300</td>
<td>25%</td>
<td>4.6</td>
<td>25%</td>
<td>19,900</td>
<td>25%</td>
<td>1.8</td>
</tr>
<tr>
<td>Services</td>
<td>324,000</td>
<td>25%</td>
<td>29.7</td>
<td>25%</td>
<td>247,700</td>
<td>25%</td>
<td>22.7</td>
</tr>
<tr>
<td>Government</td>
<td>52,100</td>
<td>25%</td>
<td>4.8</td>
<td>25%</td>
<td>18,600</td>
<td>25%</td>
<td>1.7</td>
</tr>
<tr>
<td>Total All Industries</td>
<td>491,600</td>
<td>25%</td>
<td>45</td>
<td>25%</td>
<td>309,000</td>
<td>25%</td>
<td>28</td>
</tr>
</tbody>
</table>

Total Long-Term Demand for Land Designated for Office Uses (acres) | 73

TPU: Transportation, Communications, and Public Utilities
FIRE: Finance, Insurance, and Real Estate

Source: Economic Opportunities Analysis (Demand for Office Space)

The nearly 500,000 square feet of office space needed through year 2006 translates to approximately 45 acres of land. For the long term, the need for office space will require approximately 75 acres of land zoned for office-commercial uses.

POTENTIAL INDUSTRIAL AND OFFICE-COMMERCIAL LAND NEEDS

In order to evaluate the land needs of another scenario, the impact of a potential steel mill and natural gas pipeline have been added to the baseline projections of employment. Using the same floor-area ratio of 0.25 as was used in the baseline analysis, the impact of these potential new uses increases the need for land designated for industrial uses to 82 acres between 1996 and year 2006, with total need increasing to approximately 110 acres by year 2020, as shown in Table 4-4.
### Table 4-4
**Potential Demand for Land Designated for Industrial Uses**
**Coos County, Oregon**

<table>
<thead>
<tr>
<th></th>
<th>1996-2006</th>
<th></th>
<th>2007-2020</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Demand for Industrial Space</td>
<td>Demand for Industrial Land (s.f.)</td>
<td>Coverage</td>
<td>(Acres)</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>336,750</td>
<td>25%</td>
<td>30.9</td>
<td></td>
</tr>
<tr>
<td>TPU</td>
<td>91,000</td>
<td>25%</td>
<td>8.4</td>
<td></td>
</tr>
<tr>
<td>Wholesale Trade</td>
<td>77,000</td>
<td>25%</td>
<td>7.1</td>
<td></td>
</tr>
<tr>
<td>Retail Trade</td>
<td>307,500</td>
<td>25%</td>
<td>28.2</td>
<td></td>
</tr>
<tr>
<td>FIRE</td>
<td>2,800</td>
<td>25%</td>
<td>0.3</td>
<td></td>
</tr>
<tr>
<td>Services</td>
<td>52,150</td>
<td>25%</td>
<td>4.8</td>
<td></td>
</tr>
<tr>
<td>Government</td>
<td>22,750</td>
<td>25%</td>
<td>2.1</td>
<td></td>
</tr>
<tr>
<td>Total All Industries</td>
<td>889,950</td>
<td>82</td>
<td>274,050</td>
<td>25</td>
</tr>
</tbody>
</table>

*TPU: Transportation, Communications, and Public Utilities
FIRE: Finance, Insurance, and Real Estate

Source: Economic Opportunities Analysis (Demand for Industrial Space)

With the impact of a potential steel mill and natural gas pipeline added to the office-commercial analysis, the need for office-commercial space also increases. With these potential uses, the need for office-commercial land is nearly 60 acres by year 2006, reaching nearly 90 acres by year 2020, as shown below in Table 4-5.

### Table 4-5
**Potential Demand for Land Designated for Office Uses**
**Coos County, Oregon**

<table>
<thead>
<tr>
<th></th>
<th>1996-2006</th>
<th></th>
<th>2007-2020</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Demand for Office Space (s.f.)</td>
<td>Demand for Office Land (s.f.)</td>
<td>Coverage</td>
<td>(Acres)</td>
</tr>
<tr>
<td>Mining and Construction</td>
<td>15,000</td>
<td>25%</td>
<td>1.4</td>
<td></td>
</tr>
<tr>
<td>Manufacturing</td>
<td>27,000</td>
<td>25%</td>
<td>2.5</td>
<td></td>
</tr>
<tr>
<td>TPU</td>
<td>12,600</td>
<td>25%</td>
<td>1.2</td>
<td></td>
</tr>
<tr>
<td>Wholesale Trade</td>
<td>25,800</td>
<td>25%</td>
<td>2.4</td>
<td></td>
</tr>
<tr>
<td>Retail Trade</td>
<td>45,300</td>
<td>25%</td>
<td>4.2</td>
<td></td>
</tr>
<tr>
<td>FIRE</td>
<td>60,600</td>
<td>25%</td>
<td>5.6</td>
<td></td>
</tr>
<tr>
<td>Services</td>
<td>362,100</td>
<td>25%</td>
<td>33.3</td>
<td></td>
</tr>
<tr>
<td>Government</td>
<td>84,000</td>
<td>25%</td>
<td>7.7</td>
<td></td>
</tr>
<tr>
<td>Total All Industries</td>
<td>632,400</td>
<td>58</td>
<td>321,900</td>
<td>30</td>
</tr>
</tbody>
</table>

*TPU: Transportation, Communications, and Public Utilities
FIRE: Finance, Insurance, and Real Estate

Source: Economic Opportunities Analysis (Demand for Office Space)
These estimated land requirements are based on employment projections, estimated impacts of potential entrants, and current development patterns. They are intended to provide a representation of the magnitude of land required, not a prediction of future development. Some increases in employment may absorb space already available but currently underutilized, and technological advancements may result in efficiencies not reflected here.

**WATER-DEPENDENT LAND NEEDS**

Two compelling forces are driving the separation of the international port industry into several distinct tiers. The introduction of containerization to the break-bulk segment of the marine transportation industry following World War II was the event that began the division, while the increasing dominance of ever larger containerships and bulk carriers in the world’s maritime trade lanes continues the process.

The top tier comprises ports serving large population centers with extensive inland infrastructure and immediate access to multiple rail and highway connections, while smaller ports which cannot accommodate the larger vessels survive by serving as feeder ports or by handling niche cargoes such as forest products, moderate volumes of bulk commodities, processed metals (steel, aluminum, etc.) and project (heavy-lift and oversized) cargoes.

According to the *Journal of Commerce*, the requirements for success in the large-port tier include channel depths in excess of 45 feet and excellent intermodal/multimodal rail and highway connections through dedicated terminal facilities. The need for ever deeper channels is driven in part by the increasing size and draft of new vessels, and the ongoing implementation of load-centering, where vessels call fewer port to load greater volumes of cargo during vessel rotations.

In the containership segment, only 1 percent of the world’s containership fleet is currently in the 4,500-plus TEU (20-foot equivalent units) category, but it is estimated that 33 percent of the fleet will be that size by year 2010. The larger vessels are common in the trans-Pacific trades. Their use is growing on the Atlantic shipping lanes, and they have entered the Europe-Asia trade.

While inadequate channel depth has relegated many ports to the secondary tier of the ports industry, other factors apply. Shoreside cargo-handling operations require adequate acreage and suitable infrastructure and equipment to receive, handle, and store both inbound and outbound commodities. Modern-day container terminals must have 50 to 75 acres of back land per berth to accommodate nearly any type of cargo operation. Cost efficiency and just-in-time logistics demand immediate access to reliable surface transportation corridors.

Communities surrounding successful ports have made massive investments in rail and highway infrastructure and equipment. Trucks and trains leaving even the most efficient ports must not experience delays caused by crowded or inadequate surface transportation routes if they want to maintain system efficiency. For example, growth at the ports of Seattle and Tacoma, among the most efficient in the country, is threatened by infrastructure bottlenecks at numerous railroad grade crossings and by tunnel clearance problems in the Cascade Mountains.

Infrastructure limitations around the Coos Bay/North Bend region will likely dictate that the Port of Coos Bay will remain in the secondary tier of ports. As such, its growth will be constrained, with the

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1 Mongelluzzo, Bill, “How Big Ships will Change Port System; Some Facilities Face Inevitable Demotion to Feeder Status,” *Journal of Commerce*, September 29, 1997, p 1A
The majority of inbound cargoes destined to meet the needs of regional industrial operations, while outbound shipment likely will be limited to regionally-produced commodities, primarily forest products. There will continue to be opportunities for cargo diversification and additional tonnage in areas such as bulk commodities, processed metals, and metal production feed stocks.

The Port of Coos Bay will function as both a feeder port to larger west coast shipping centers, primarily through barging, and as a niche port focused on forest products and moderate volumes of bulk commodities. For example, marine terminals in Coos Bay have exported copper ore and imported nickel ore in recent years. The land requirements for all types of cargo uses is expected to remain relatively constant with current land needs.

RETAIL-COMMERCIAL LAND NEEDS

Available to absorb some of the growing retail demand is new development and redevelopment occurring in the cities of Coos Bay and North Bend, including a new North Bay Shopping Center, an OfficeMax development, and Safeway redevelopment. The new shopping center will provide a total of over 110,000 square feet of community commercial retail space and two dining establishments totaling over 151,000 square feet.

Built on approximately 11.5 acres of land, the new shopping center's site coverage is approximately 0.25, somewhat more intensive than, but still consistent with, development assumptions (of 0.20) applied in this analysis. Subtracting the new development from the anticipated growth in demand, estimated spending in the Bay Area will require development of an additional 16 acres of retail-commercial land by year 2005. Growth and increased spending is expected to continue through the planning horizon. The need for land designated for retail-commercial uses is expected to reach an additional 50 acres by year 2020, as shown in Table 4-6.
### TABLE 4-6
DEMAND FOR LAND DESIGNATED FOR RETAIL USES
COOS COUNTY, OREGON

<table>
<thead>
<tr>
<th></th>
<th>1996-2005</th>
<th>2006-2020</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Demand for Retail Space (s.f.)</td>
<td>Demand for Retail Land (Acres)</td>
</tr>
<tr>
<td>Food</td>
<td>28,900</td>
<td>20%</td>
</tr>
<tr>
<td>Eating and Drinking</td>
<td>22,800</td>
<td>20%</td>
</tr>
<tr>
<td>Retail Sales</td>
<td>40,700</td>
<td>20%</td>
</tr>
<tr>
<td>Household</td>
<td>11,400</td>
<td>20%</td>
</tr>
<tr>
<td>Automotive</td>
<td>98,100</td>
<td>20%</td>
</tr>
<tr>
<td>Other Categories</td>
<td>60,200</td>
<td>20%</td>
</tr>
<tr>
<td>Subtotal</td>
<td>262,100</td>
<td></td>
</tr>
<tr>
<td>Absorbed by North (126,694)</td>
<td>25%</td>
<td>*(14.5)</td>
</tr>
<tr>
<td>Bay Shopping Center</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>135,400</td>
<td>16</td>
</tr>
<tr>
<td>Total Long-Term Demand for Land Designated for Retail-Commercial Uses (acres)</td>
<td>51</td>
<td></td>
</tr>
</tbody>
</table>

* The North Bay Shopping Center’s site coverage is slightly higher than those applied in this analysis; the acreage of retail land required is adjusted accordingly.

**Source:** Economic Opportunities Analysis (Demand for Retail Space)

Similar to the industrial and office-commercial space requirements, this analysis is based on current development and consumer spending patterns. Further, this analysis assumes that the Bay Area will be able to successfully minimize retail leakage through adequate selection and competitive pricing. Additionally, new retail operations may select space already available but currently vacant or underutilized.

**CONCLUSION**

Based on the information presented herein, this analysis suggests the Bay Area will experience increases in population and employment, with a resulting need for new housing, industrial, office-commercial, and retail-commercial development. The Regional Site Availability Technical Memorandum summarizes the inventory of available commercial and industrial land in the Bay Area. The land requirements are compared to the short-term supply of serviceable sites in Table 4-7.
As described in the Economic Opportunities Analysis (Chapter 2), the two scenarios include a baseline scenario and potential scenario. The baseline scenario is estimated using the employment forecasts developed by the State of Oregon Employment Department and Office of Economic Analysis. The potential scenario includes the addition of a potential steel mill and natural gas pipeline. As shown in Table 4-7, the Bay Area will require additional lands designated for commercial uses in both scenarios in order to meet its land needs requirements in the short term.

In the long term, the evaluation is based on total acreage available. The land requirements are compared to the total availability of land designated for commercial and industrial uses in Table 4-8.

As shown in Table 4-8, both the baseline and potential growth scenarios show a deficit of available land designated for commercial uses. Although there appears to be adequate amounts of land designated for industrial uses, several of the available sites have significant development constraints, such as environmental constraints (e.g., areas within the floodplain, wetlands) and/or lack of public facilities.

Due to development of larger containerships and a corresponding need for ever deeper channels and excellent intermodal connections, the Port of Coos Bay will likely serve as a feeder port, receiving cargo by smaller ships from hub ports (those with channel depths in excess of 50 feet and immediate access to

April 30, 1998

Bay Area Comprehensive Economic Analysis

4-8
surface transportation). Growth of local shipping and other water-dependent land uses will be limited, with most of the inbound shipments serving the consumption needs of the immediate Bay Area and most outbound shipments limited to locally-generated wood products. The need for land designated for water-dependent land uses is expected to remain relatively constant with current needs.

The cities of Coos Bay and North Bend, Coos County, and the Port of Coos Bay will need to work together to coordinate regional planning efforts. Such coordination will ensure that appropriate amendments are made to comprehensive plans and zoning ordinances while protecting the necessary land base. New development resulting from growth and change in the community will require appropriately designated lands and development standards.
CHAPTER 5: OVERALL OBJECTIVES FOR ECONOMIC DEVELOPMENT

Many of the strategies presented below are contained in Vision 2006, which compiled and clarified strategies initially presented in other Bay Area sources. Other strategies listed below are based on the consultant team's secondary research and discussions with members of the Steering Committee.

REGIONAL COORDINATION

- Coos County, the City of Coos Bay, and the City of North Bend will coordinate on issues related to economic development, in the region. Issues to be coordinated include, but are not limited to land use planning and provision of urban services and transportation facilities.
- Coordinate with appropriate government agencies to ensure compliance with federal, state, and local environmental regulations, and to adopt conservation measures that balance environmental protection with economic development.

PLANS AND POLICIES

- The cities of Coos Bay and North Bend, and Coos County will evaluate current plans and policies and revise them, as appropriate, to encourage economic development and diversification in the region. Regional coordination will be included in the evaluation process, as provided for in the signed MOA.

BUSINESS DEVELOPMENT

- Support ongoing efforts of the Bay Area's business incubator facility.
- Develop a defined business recruitment program for the Bay Area.
- Support efforts for greater economic diversification of the Bay Area while continuing to promote employment and development within three key industries: wood products, tourism, and fisheries.
- Support the continuation and expansion of professional technical education and employee training programs at SWOCC to meet the workforce development needs of existing, emerging, and relocating small businesses.
- Support continued development of the Bay Area as a regional medical center.
- Seek out opportunities for public/private partnerships to develop vacant and under-utilized properties.

INFRASTRUCTURE AND TRANSPORTATION

- Support efforts to increase infrastructure capacity for future economic development (e.g., water and wastewater capacity, additional electrical capacity, and a natural gas pipeline).
- Support efforts to ensure appropriate commercial air transport facilities and air services with improved schedules, fares, and routes.
• Work with ODOT to ensure highways accessing the Bay Area are maintained and/or improved to ensure safety and reduce travel time to and from the Bay Area.
• Promote suitable and sustainable truck and rail freight service serving the Bay Area.

**SHIPPING AND MARITIME DEVELOPMENT**

• Promote cargo diversification and greater utilization of the region's maritime capacity to help retain and expand family-wage jobs throughout the Bay Area communities.
• Continue development of North Bay Marine Industrial Park infrastructure and seek viable partnerships for establishing industrial operations throughout the area.
• Support the commercial seafood industry and facilitate increased recreational tourism in the Bay Area through ongoing improvements to infrastructure and facilities in the Charleston Marina complex.

**TOURISM**

• Diversify the marketing tools for promotion of the visitor products in the Bay Area that will build an image of the area as a year-round visitor destination.
• Support development and maintenance of tourism-related businesses, parks, and downtown areas into user-friendly destinations.

**URBAN WATERFRONT AREAS**

• Remove physical and psychological barriers to ensure waterfront property is accessible to the community.
• Redesignate portions of the urban waterfront to allow for a mix of industrial, commercial, residential, and open space uses.
• Assess environmental quality (e.g., potential contamination) of waterfront properties to identify hindrances to redevelopment.
CHAPTER 6: ACTION PLAN

INTRODUCTION

The Bay Area's economy has been shifting, over the last decade or so, from one based heavily on natural resources (particularly wood products and fishing) to one that is more diversified, and Bay Area jurisdictions are working to further economic diversification. The Steering Committee for this Comprehensive Economic Analysis, composed of representatives of the local jurisdictions, the Oregon International Port of Coos Bay, DLCD, and OEDD, has identified objectives for future economic development in the Bay Area. The objectives will form the basis of a development strategy for the region, which, in turn, guides the recommendations in this action plan.

The objectives are grouped in general categories. In summary, the objectives are:

- to coordinate, as a region, on issues related to economic development (including land use planning);
- to promote development of the region's traditional, natural-resource-based industries as well as tourism, medical facilities, and new industries and commercial businesses;
- to ensure the region is served by public services and transportation that will meet the needs of existing and potential businesses;
- to promote the region's shipping and maritime resources;
- to encourage tourism; and
- to enhance the waterfront areas of downtown North Bend and Coos Bay.

Taken together, the objectives are aimed at encouraging and diversifying the Bay Area’s economy and quality of life.

GENERAL IMPLEMENTATION RECOMMENDATIONS

Regional Approach

A regional approach to economic development is important in the Bay Area for several reasons. The cities of North Bend and Coos Bay are contiguous, and they face many similar economic and land use issues. Coordination between the two cities is necessary for a number of reasons, e.g., ensuring connected transportation facilities and efficient provision of urban services. Coordination with Coos County is also important for economic development, e.g., because the County has the largest industrial land base in the region.

Regional coordination will also play an important role for the jurisdictions to comply with Statewide Land Use goals and regulations. Under Goal 9 (Economic Development) and Goal 14 (Urbanization) and their implementing rules, jurisdictions must provide adequate opportunities for a variety of economic activities and an adequate supply of land for each category of land use. A regional planning approach will allow Bay Area jurisdictions to meet these requirements as a whole, rather than individually.
Regional Coordination Objective
Coos County, the City of Coos Bay, and the City of North Bend will coordinate on issues related to economic development in the region. Issues to be coordinated include, but are not limited to, land use planning and provision of urban services and transportation facilities.

General Recommendations for Regional Coordination
Representatives from Coos County, the City of North Bend, the City of Coos Bay, and the Oregon International Port of Coos Bay will continue to meet on a regular basis (e.g., once a month) to assess implementation of the Action Plan and economic development strategies, to share information about potential and proposed development, and to coordinate activities related to economic development of the Bay Area (e.g., permitting, provision of infrastructure, etc.).

Coos County and the cities of Coos Bay and North Bend will craft, commit to, and sign a Memorandum of Agreement (MOA) which defines the roles and responsibilities of each jurisdiction and the Port, for implementing local economic development strategies. The MOA may contain each jurisdiction's objectives as well as the objectives of the region as a whole. It may also contain each jurisdiction's responsibilities for provision and maintenance of infrastructure, provision of adequate land supplies for each general type of land use (as required by Goals 9 and 14), etc. At a minimum, the MOA will encourage continued regional coordination on land use issues.

Plan and Policy Revisions
Many of the plans and policies affecting or related to economic development and land use in the Bay Area were reviewed and analyzed for their potential to hinder economic development in the region. The analysis findings are presented in the Plan and Policy Review (Chapter 3). In general, it was found that the comprehensive plans and implementing ordinances of local jurisdictions should be revised to reflect the local jurisdictions' desire to enhance and diversify the regional economy.

Plan and Policy Objective
The cities of Coos Bay and North Bend, and Coos County, will evaluate current plans and policies and revise them, as appropriate, to encourage economic development and diversification in the region. Regional coordination will be included in the evaluation process, as provided for in the MOA.

General Recommendations for Plan and Policy Revisions
Coos County and the cities of Coos Bay and North Bend should consider adopting a floating zone to encourage commercial and/or industrial uses while preserving a prescribed amount or percentage of land for water-dependent or water-related uses. The floating zone may be particularly suited to the downtown waterfront areas of North Bend and Coos Bay.

The cities of Coos Bay and North Bend should encourage development of a mix of uses along their waterfronts and, as appropriate, in other areas of the cities. Mixed-use areas can encourage pedestrian activity, making an area attractive to visitors as well as reducing automobile use (as required by the Oregon Transportation Planning Rule).
Coos County and the cities of North Bend and Coos Bay should utilize the current periodic review cycle to thoroughly evaluate and revise their existing plans and policies. Through periodic review, jurisdictions can redesignate land and revise policies and ordinances through a legislative, rather than quasi-judicial process. The requirements for notice and review are less stringent for legislative decisions than the requirements for quasi-judicial decisions. The legislative process also requires a city-wide, county-wide, or region-wide planning focus, providing local jurisdictions with the opportunity to make significant revisions (e.g., redesignation of large areas, adoption of new zoning categories, etc.)

Existing land use inventories in local plans and policies are out of date. The Regional Site Availability and Regional Land Needs technical memoranda provide a basis for updating existing jurisdictions’ inventories and for making decisions about future land needs. Each local jurisdiction should share information with the other jurisdictions about land uses as they work together to maintain and update a regional inventory of vacant or available land. The regional inventory would be a useful planning tool, particularly to ensure an adequate supply of land for various land uses in the region as a whole. Procedures for maintaining the regional inventory may be included in the MOA.

Local jurisdictions should evaluate the infrastructure needs of sites designated for water-dependent or water-related (including ESWD) uses. As identified in the Regional Land Needs technical memorandum, the Bay Area has an over-supply of land designated for water-dependent or water-related uses. However, the Coos Bay Channel is a special resource for the region, which gives the Bay Area an advantage over other coastal communities. Local jurisdictions should preserve that advantage, in part, by maintaining an adequate supply of land designated for water-dependent or water-related uses. In addition, sites designated for water-dependent or -related uses must have the infrastructure needed for such uses. Therefore, local jurisdictions should develop an understanding of those infrastructure needs and designate sites that have the necessary infrastructure in place or can be reasonably served.

**SPECIFIC IMPLEMENTATION RECOMMENDATIONS**

In this section, key issues raised in the Plan and Policy Review (Chapter 3) are summarized. Following the summary of each plan are specific recommendations for Bay Area jurisdictions to implement in order to promote economic development in the region.

**Vision 2006: A Ten Year Economic Development Vision for Oregon's Bay Area**

The regional goals and strategies presented in Vision 2006 offer guidance for economic development of the Bay Area. Many of those strategies were incorporated into the overall economic objectives and strategies presented in Chapter 5 of this document. Some of the strategies for commercial districts development relate to Coos Bay’s and North Bend’s urban renewal plans. DLCD has indicated that portions of local urban renewal plans are inconsistent with local comprehensive plans and the land development ordinance. (See discussions of those plans in this chapter.)
Recommendations

Bay Area jurisdictions should continue to refer to the goals and strategies presented in Vision 2006 as decisions are made that affect economic development in the region. Vision 2006 also contains specific action items to implement the economic strategies.

Local jurisdictions should address discrepancies between local urban renewal plans and comprehensive plans. Such discrepancies can and should be rectified during local periodic review.

Coos County Comprehensive Plan, 1985, Volume 1, Part 1

Volume 1, Part 1, of the Coos County Comprehensive Plan outlines the goals and strategies of the Plan. This analysis focuses on specific sections related to economic development in the Bay Area, including capital facilities planning, transportation planning, and urban growth management.

Strategy 1 of Section 5.18 (Public Facilities and Services) of the County Comprehensive Plan encourages the cities of North Bend and Coos Bay to develop capital improvement programs to provide services to their region, rather than the cities alone. Regional economic development strategies indicate that insufficient infrastructure in the Bay Area continues to present a challenge to economic development efforts. Because local jurisdictions have little control over some of the needed infrastructure improvements (e.g., state highways and natural gas pipeline extensions), the challenge of providing adequate infrastructure is particularly difficult.

Strategy 5 of Section 5.18 allows self-contained community water systems for industrial users for developments of 10 or more parcels. The strategy may impede development of smaller industrial sites if services are lacking because of increased site development costs resulting from the need to provide independent water systems.

Strategy 3 of Section 5.19 (Transportation) of the County Comprehensive Plan allows for the designation of special improvement districts to upgrade roads. Regional economic development strategies indicate that structural improvements, safety improvements, reduced travel time, and improved traffic flow are needed on roads and highways serving the Bay Area.

Strategy 1 of Section 5.22 (Urbanization) states that the County will periodically review the appropriateness of each city's urban growth boundary (UGB). There are currently clusters of residential, commercial, and industrial land in unincorporated areas (and outside the UGBs of North Bend and Coos Bay) that follow urban development patterns. Expansion of the UGB and development of appropriate Urban Growth Management Agreements (UGMAs) may be one way to encourage economic development in these exception areas.

Recommendations

Coos County should continue to work with the cities of North Bend and Coos Bay to provide public facilities and services throughout the Bay Area. As presented in Chapter 5 of this document, Bay Area jurisdictions should coordinate on issues related to economic development, including provision of urban services, and should enter into a formal agreement for regional coordination. If the jurisdictions enter...
into such an agreement, Strategy 1 of Section 5.18 of the County Comprehensive Plan should be revised to reflect the regional approach adopted by all three local jurisdictions.

Further analysis of the level of water and wastewater services to industrially-zoned areas would determine whether availability of these services is an impediment to industrial development. Such analysis should be conducted by local jurisdictions through the periodic review process. Coos County should consider revising Strategy 5 in accordance with analysis results.

Coos County should review the limitations of Measures 5 and 50 to clarify whether implementation of special improvement districts for transportation improvements is currently possible. If it is not, Coos County should conduct further analysis of current funding strategies for improving roadways and should revise Section 5.19 of the Comprehensive Plan accordingly.

Coos County should evaluate existing UGMAs with the cities of Coos Bay and North Bend to determine whether issues related to urban growth boundaries and provision of urban services and facilities are being addressed adequately. UGMAs should be revised, as appropriate.

Coos County Comprehensive Plan, Volume II, Coos Bay Estuary Management Plan

Volume II of the Coos County Comprehensive Plan, also known as the Coos Bay Estuary Management Plan (CBEMP), restricts industrial and commercial uses of management segments using two primary designations: Urban Water-Dependent (UW) and Urban Development (UD). The definition of "water-related," as provided within the CBEMP, includes commercial uses only if they specifically serve water-dependent uses. In most areas where non-water-dependent or non-water-related uses are allowed, they are allowed only in areas away from the shoreline. For each management segment, the CBEMP restricts the intensity of non-water-dependent and non-water-related uses allowed to levels that equal the intensity of other uses within that segment. The Urban Development (UD) classification is intended to allow a mix of compatible water-dependent and non-water-dependent uses, and are the only segments that allow non-water-dependent and non-water-related uses outright. Only 12 of the 83 CBEMP management segments have a UD classification, and only five of those segments allow for commercial non-water-dependent or non-water-related development without restrictions on type of use. (Segment 44, which includes downtown waterfront for Coos Bay and North Bend, is designated UW rather than UD.)

The CBEMP sets higher priorities for resource use of shorelands than for their use as amenities which increase the profitability of non-water-dependent uses. This policy restricts the development of businesses that would capitalize on proximity of the shoreline, such as restaurants with waterfront seating or retail shops that serve waterfront visitors. It also deters the development of a cohesive downtown district which utilizes the urban waterfront to enhance civic pride and develop tourism-based enterprises.

The extensive designation of lands for water-dependent and water-related uses conflicts with the regional business development strategy supporting greater economic diversification in key industries, including tourism. (Refer to Chapter 5, Overall Objectives for Economic Development, Business Development.) The CBEMP limits non-water-related uses (e.g., commercial uses) that could utilize a
waterfront location as an income-enhancing amenity by designating them as lowest-priority. Restrictions on development intensity also limit commercial waterfront development.

Recommendations

As stated in Chapter 2 (Prospective Industrial and Commercial Uses), many cities have revitalized formerly industrial waterfronts by redeveloping them with a mix of commercial, residential, recreational, and industrial uses, often preserving historical character. The cities of Coos Bay and North Bend should consider redeveloping their downtown waterfront areas in a similar manner. To do so would require redesignation from Urban Water-Dependent. Bay Area jurisdictions should redesignate the downtown waterfront areas to allow a mix of uses or implement a floating zone to ensure a specified amount of land remains in water-dependent or water-related uses. Florence, Oregon, recently adopted a floating zone for ESWD land. An example ordinance for a floating zone is included in Appendix B.

It will be important for local jurisdictions to coordinate planning issues related to revising and implementing the CBEMP, particularly for CBEMP management segments within city UGBs.

Table 3-1 in Chapter 3 of this document presents potential issues and conflicts with regional economic objectives. Bay Area jurisdictions may refer to Table 3-1 for guidance in assessing and revising policies for specific management segments.

Coos County Zoning and Land Development Ordinance

The Coos County Zoning and Land Development Ordinance is a large, complex document, primarily because it includes separate regulations for each management segment within the CBEMP and the Coquille River Estuary Management Plan. The document also has inconsistent references which make it difficult to locate needed information. (See discussion of the Ordinance in Chapter 3 for specific examples.) Problems such as these can burden planning staff to interpret ordinance and make it difficult for developers to access and understand the information they need.

The CBEMP zone descriptions within the Ordinance are virtually identical to the descriptions of the segments provided within the CBEMP itself. Uses allowed under management objectives for some CBEMP management segments are specific current or previous uses rather than general use types. For example, one segment allows uses that support a nearby marina; if the marina closes, the management objectives need to be revised. Allowing only such specific uses does not allow land use to change as the area’s economic or physical environment changes.

Determining the boundaries for an area can be difficult. Segment boundaries are not described in terms of legal descriptions or parcels, but in relationship to local landmarks, geographic features, or surrounding buildings. Such complexity can be a deterrent to developers who may feel overwhelmed by the CBEMP regulations.

Recommendations

The Ordinance should be revised to allow more development flexibility in CBEMP management segments. Additional flexibility could be achieved by permitting general types of uses, rather than
specific uses, and including performance and/or development standards. (For example, a segment could allow industrial uses that meet specified criteria for minimum lot size and required riparian protections, such as buffers or coverage limitations for impervious surfaces.) Allowing general use types would also allow some adjoining management segments to be combined, thus simplifying the complex document and its implementation.

Development flexibility could also be achieved by allowing uses accessory to water-dependent or water-related uses. An example accessory use ordinance is included in Appendix B. The Ordinance should also be revised to provide clear and objective criteria for determining allowed uses and even for determining the boundaries of different management segments. These types of changes would also help simplify the CBEMP sections of the Ordinance and Comprehensive Plan.

Coos County should make a thorough review of the Ordinance to identify and address inconsistent references and other problems with readability and accuracy. The Ordinance should also include a list of referenced maps and other documents, and where to obtain them.

City of North Bend 1995 Comprehensive Land Use Plan, Plan Provision and Policies

The Comprehensive Plan, originally adopted in 1979, includes elements which have not been changed since adoption, reflecting concerns of the late 1970s, including fuel shortages and population growth. Amendments to the Plan since 1979 stemmed primarily from periodic review in November 1989.

The Coastal Element of the Comprehensive Plan implements strategies associated with the portion of the Coos Bay Estuary and shorelands that lie within city limits. There are conflicts between shoreland designations and allowed uses in the Coastal Element and the CBEMP designations and allowed uses. The management units/segments in both plans are similar, but not identical and, since the CBEMP takes precedence over the Coastal Element, conflicts between the two plans could potentially affect development. Some specific conflicts are outlined in Chapter 3 of this document. According to DLCD staff, the Coastal Element was to have been removed from the Plan by ordinance in 1984 (Toby, pers. comm., 1997), yet it is still included in the Plan document.

Recommendations

A thorough review of the Plan should be made during periodic review. Portions of the Plan that are no longer applicable should be revised. The City should also ensure that Comprehensive Plan policies are consistent with the City's Urban Renewal Plan, which outlines a plan for redevelopment and revitalization of the city's downtown and waterfront and supports economic development in the Bay Area.

The Comprehensive Plan should include a policy that the City will continue to support development of the North Bend Municipal Airport to ensure appropriate commercial air transport facilities and air services with improved schedules, fares, and routes.

Conflicts between the Coastal Element and the CBEMP should be resolved. The City of North Bend should review its records to determine if the Coastal Element was removed from the Plan by ordinance and, if so, copies of the Plan document should be revised accordingly. If not, the City should consider
removing the Coastal Element from its Plan and incorporate the CBEMP, by reference, to regulate management segments within city limits. The City and County should coordinate planning efforts, as both jurisdictions go through periodic review, to reach consensus on regulations and management objectives for management segments.

Policy 3 of the Land Use Element of the Plan states that the “City shall coordinate, as appropriate, land development and estuarine uses with Coos County and the City of Coos Bay so that areawide economic and resource needs can be met.” A formal agreement would ensure that such coordination takes place.

Zoning Ordinance of the City of North Bend
As discussed in Chapter 3 of this document, the principal effects of the Zoning Ordinance on economic development are in the commercially and industrially zoned districts and the F-P overlay.

With the exception of the prohibition of nuisances due to noise, smoke, odor, dust or gas, the regulations on industrial uses appear to be fairly flexible. As many industries tend to create nuisances, this restriction could limit the potential for North Bend to attract such businesses. The restriction on nuisances may potentially conflict with uses otherwise permitted by the CBEMP in waterfront industrial areas. On the other hand, the restriction is consistent with policies to attract cleaner industries and would enhance development of recreational or other uses along the waterfront and in the downtown area.

The City’s Zoning Ordinance and Map are not consistent with the CBEMP. The City’s Zoning Map does not indicate CBEMP management segments, which can lead to invalid assumptions about waterfront property by developers. For example, the Map shows the entire downtown waterfront area zoned as M-H (Manufacturing - Heavy), and developers or planners unfamiliar with local plans and codes would assume that the only applicable criteria for proposed development in that area would be found in the appropriate M-H Zoning Code section. However, proposed development in that area is regulated by the CBEMP.

Recommendations
The City should update its Zoning Ordinance and Map to reflect existing regulation by the CBEMP for designated management segments along the shoreline. Implementation of a specific zoning designation for waterfront areas (such as the W-I designation in Coos Bay) is an option to consider for management segments that will remain as CBEMP management segments.

The City, working with the City of Coos Bay and Coos County, should redesignate the downtown waterfront to allow commercial uses or a mix of uses, or implement a floating zone to ensure a specified amount of land remains in water-dependent or water-related uses. An example ordinance for a floating zone is included in Appendix B. Redesignation of the downtown waterfront would help ensure that the Zoning Ordinance and Map further development proposed by the City’s Urban Renewal Plan.

North Bend Urban Renewal Plan and Report
To implement the Urban Renewal Plan, approximately 20 acres of industrial land would require redesignation to Central Commercial. The proposed zone change presents a potential conflict between the Urban Renewal Plan and the North Bend Comprehensive Plan and Zoning Ordinance. To expand
commercial areas, the Comprehensive Plan requires that a need for new commercial land be demonstrated and that the proposal follow procedures for expanding unified shopping areas. Any changes to unified shopping areas are subject to approval by the Planning Commission (Section 45 of the Zoning Ordinance). Otherwise, areas adjacent to shopping centers and commercial areas "shall retain their non-commercial zoning." These strategies could limit implementation of the Urban Renewal Plan. However, they are more likely to help prevent strip-commercial development and ensure development of projects that are consistent with the City's vision.

The Urban Renewal Plan is predicated on development of non-related and non-dependent uses in the waterfront area, which conflicts with the policies and regulations of the North Bend Comprehensive Plan Coastal Element and the CBEMP. Of particular importance is CBEMP management segment 44 UW, which is designated as ESWD and precludes non-water-dependent, non-water-related uses, except uses in support of water-dependent or related uses. Since the CBEMP takes precedence over the Comprehensive Plan and Urban Renewal Plan, the conflict should be resolved to facilitate future economic development and implementation of the Urban Renewal Plan.

Recommendations
Conflicts between the Urban Renewal Plan and the North Bend Comprehensive Plan and the CBEMP should be resolved in order to implement the North Bend Urban Renewal Plan. Implementation of the Urban Renewal Plan will require redesignation from Urban Water-Dependent, as recommended above (North Bend zoning ordinance).

City of Coos Bay Comprehensive Plan 2000
The Comprehensive Plan contains general policies that guide the city's development in the areas of physical environment, ecology, historical resources, land use, transportation, economic development, housing, and recreation. Chapter 3 (Plan and Policy Review) discusses in some detail, policies related to Bay Area economic development. Policies of specific concern are briefly described below. They include: Tidelands, Infrastructure, and Economic Development.

Tidelands. Coos Bay Comprehensive Plan strategies promote cooperation between the City of Coos Bay and other government agencies in conserving and protecting fish and wildlife habitat in tideland areas. The extensive tidelands within the city limits may restrict waterfront development. However, appropriate conservation measures could balance habitat protection with recreation and other uses. Protecting tidelands could also preserve scenic quality in the waterfront area—a marketable element in economic development.

Infrastructure. The Comprehensive Plan documents serious limitations in Coos Bay's infrastructure. Without clear plans to upgrade infrastructure, the City could find it difficult to attract new industry. Poor water quality in the bay could also hamper economic development efforts by having a negative impact on the health of the estuary, the aquaculture industry, and tourism-based commerce. The region's water quality has improved since the mid-1980s, but should remain of local concern.
Since the last update of the Comprehensive Plan, some improvements in infrastructure have been made (e.g., sewage treatment plant). Plan policies need to be updated to more accurately reflect the City’s existing infrastructure, as well as anticipated needs.

**Economic Development.** Plan goals and strategies relating to the use of shorelands are in conflict with one another. The city hopes to attract tourism while restricting much of the city’s waterfront property to industrial uses. The CBEMP restricts waterfront uses near the Coos Bay downtown to water-dependent industrial uses and does not allow most types of commercial development (including restaurants and lodging facilities) along the waterfront.

The Comprehensive Plan acknowledges a local lack of industrial land and identifies conflicts in providing sufficient land for industry. Much of the city’s existing industrial land is in parcels too small to be feasibly developed for intensive industrial uses. In addition, the existing mix of uses often precludes intense industrial development, which may not be compatible with commercial and other uses. The Plan recommends continuing use of the I-C zone to retain the commercial character of these lands, and suggests reevaluating land uses to determine if lands currently zoned to allow industry can realistically be developed for those uses.

The Plan also recommends preserving, and possibly expanding, lands for exclusive industrial uses to provide sufficient land and services to accommodate the needs of intense industrial uses. This objective is to be implemented by continuing "to protect areas along the waterfront for industrial uses at sites, identified in compliance with the coastal goals, to possess locational characteristics making them more useful for water-dependent and water-related activities . . . . The city shall attempt to zone additional property exclusively for industrial use with severe restrictions on commercial activities (9-9)." This strategy conflicts with the City's current desire to utilize its waterfront to encourage tourism.

**Recommendations**

*Bay Area jurisdictions should continue to coordinate on planning issues, including those related to environmental quality. A process for evaluating the relative advantages and potential impacts of various types of development on tidelands would be a critical element in a regional plan that would accomplish economic development objectives while complying with federal, state, and local environmental regulations and preserving the scenic qualities of the Bay Area. The Coos Bay Comprehensive Plan should include a policy to consider potential indirect impacts to tidelands, particularly impacts related to development on adjacent properties (e.g., runoff, vegetation removal).*

*The City of Coos Bay should utilize the current periodic review cycle to thoroughly evaluate and revise their Comprehensive Plan and its policies. The Plan should be updated to more accurately reflect the existing local environment (infrastructure, housing, economy, etc.), as well as anticipated needs.*

*The Comprehensive Plan should include a policy that, as new information about the location and extent of environmental constraints (e.g., wetlands) becomes available, the City will utilize such information to update its inventory of vacant and available land.*
The Comprehensive Plan should include a policy that the City will continue to support development of a regional medical center.

In accordance with other recommendations in this analysis, Coos Bay should consider redesignating its waterfront area from Urban Water-Dependent to allow mixed-use development. Implementation of a floating zone, such as that employed in Florence, Oregon, may be appropriate. (An example floating zone ordinance is included in Appendix B.) Redesignation of the waterfront must be coordinated with Coos County, responsible for implementing the CBEMP, and should be coordinated with North Bend to ensure regional planning issues are addressed.

The City should approve redesignation of the Eastside area, as currently proposed by the Oregon International Port of Coos Bay. According to the Port, the Eastside area is poorly suited for industrial uses but is suited for residential and commercial development, and there is adequate land for industrial development elsewhere in the region.

As described in the Regional Land Needs chapter, the Bay Area has an adequate supply of industrial land to meet anticipated needs. However, the majority of industrial land in the Bay Area is within the jurisdiction of Coos County, and most is located on the North Spit. Coos Bay, and the other Bay Area jurisdictions, could meet their land base requirements (under Statewide Planning Goal 9) if they prepared and maintained land use inventories as a region, rather than individually. Therefore, the Bay Area jurisdictions should enter into a formal agreement for regional land use planning, including provision of an adequate supply of sites of suitable sizes, types, and locations for a variety of industrial and commercial uses consistent with Comprehensive Plan policies.

City of Coos Bay Land Development Ordinance 93

The Coos Bay Land Development Ordinance guides development in the City of Coos Bay with regulations on specific land use designations, such as C-1, I-C, W-I, as well as procedures and specific types of review.

Chapter 2.8 of the Coos Bay Land Development Ordinance contains the development regulations for the Central Commercial District (C-1), which permits a wide range of civic and commercial uses (including, among other uses, restaurants and lodging), multi-family or group residential uses above the first floor, and limited manufacturing uses. However, community recreation uses are prohibited in the C-1 district—a potential conflict with the Bay Area's goal to develop recreational and historical attributes of the area's core commercial districts. The C-1 district covers the city's historic downtown area, generally between Curtis and Highland streets, west of Highway 101.

The Industrial/Commercial (I-C) district (Chapter 2.11 of the Ordinance) allows commercial uses as well as most industrial uses; however, some uses require approval through Site Plan and Architectural Review and may also require conditional use permit approval. Although the I-C district allows for a mix of uses, promoting a diverse economy, it may result in a perceived loss of industrial lands if I-C land develops primarily with commercial uses.
The Waterfront Industrial (W-I) district (Chapter 2.12 of the Ordinance) is intended to reserve the city's waterfront for water-dependent and water-related uses. Land use and development of W-I lands are regulated by the CBEMP. Applicants must obtain any special permits required by local, state, and federal agencies and must obtain Site Plan and Architectural Review approval for the "establishment, intensification, or major remodeling of any use in the W-I district if the use is within 400 feet of any residentially zoned property." (Site Plan and Architectural Review requires applicants to submit detailed plans and attend a public hearing before the Planning Commission.) The W-I policies may increase the cost of developing W-I lands, but do not necessarily impede economic development. However, areas designated for ESWD uses have limited economic development potential.

Under Chapter 3.16 (Estuarine and Coastal Shoreland Uses and Activities), any uses or activities within the estuary or shoreland area, as defined by the CBEMP, are subject to review by staff of the Coos Bay Community Services Department. In addition to other procedures (described in Chapter 3 of this document), notice of the City's decision is mailed to adjacent land owners and a specified list of state and federal agencies. Although the CBEMP review does not conflict with local economic goals, CBEMP regulations for management segment 44 UW, on Coos Bay's downtown waterfront, restrict development to ESWD uses and do not allow commercial development in this area. This conflict does not support the region's goal of developing a historic, mixed-use area along the Coos Bay waterfront.

Chapter 4.8 of the Ordinance (Special Site Development - Manufacturing) establishes specific standards for siting manufacturing facilities in the C-1 and C-2 zones. Applications for manufacturing uses in the C-1 or C-2 must go through the conditional use permit process, which requires a public hearing and decision by the Planning Commission. However, the approval criteria for manufacturing uses in those zones is relatively simple and straightforward, and review could likely be accomplished by Community Services Department staff. The conditional use permit process is more costly and time-consuming than administrative review and may discourage potential businesses from locating in commercial zones, despite compatibility with surrounding uses.

**Recommendations**

*To develop recreation uses in its downtown, the City of Coos Bay should consider redesignating portions of the downtown area (perhaps to C-2) or amending its ordinance to add recreation uses to the list of permitted uses in the C-1 district.*

*As described elsewhere in this chapter, a coordinated regional planning effort is recommended to help Bay Area jurisdictions ensure an adequate supply of land for various uses, as well as for addressing other planning-related issues.*

*The City should consider amending Chapter 4.8 to change the review process for applications for manufacturing uses in the C-1 or C-2 zones. Instead of requiring Planning Commission review, the City could require review by Community Services Department staff.*

*The City should consider redesignation of its waterfront area, as stated in other recommendations herein, and should redesignate the Eastside area, as currently proposed by the Oregon International Port of Coos Bay.*

April 30, 1998

Bay Area Comprehensive Economic Analysis

6-12
Coos Bay Urban Renewal Plan and Report, 1988; Plan Amendments, 1994

Though the Urban Renewal Plan identifies Coos Bay Comprehensive Plan strategies consistent with Urban Renewal Plan, it does not discuss conflicts with Comprehensive Plan implementation. Specifically, the Comprehensive Plan mandates continued City protection of waterfront areas for water-dependent or -related industrial uses (Coos Bay Comprehensive Plan, 9-9).

The Urban Renewal Report provides clearly defined projects with sound rationale to support the projects. The projects are mutually reinforcing. The Report and its financial tables provide priorities for project implementation. The Plan relies on tax increment financing to fund the bulk of proposed projects. However, property tax limitation measures (Measures 5 and 50) could severely limit the City's ability to finance implementation of the Urban Renewal Plan.

The Plan Amendments allow the City to use a variety of revenue-raising techniques, including issuance of general obligation bonds. This could help minimize the effects of Measures 5 and 50. However, if the City attempts to circumvent the effects of property tax limitation measures, it could create further disincentives to development by increasing the cost of land in Coos Bay relative to land available in nearby areas.

The Coos Bay Urban Renewal Plan provides only minimal discussion of CBEMP policies and regulations. Seven CBEMP management segments lie within the Urban Renewal District boundaries. Four of the segments have a UW (Urban Water-Dependent) designation and are managed for water-dependent uses (other uses may be allowed; see discussion of the Plan in Chapter 3). The remaining three segments have a UD (Urban Development) designation, which allows a mix of uses, including non-water-dependent uses, as prescribed in the management objectives for each segment. Refer to the discussion of the Coos Bay Urban Renewal Plan in Chapter 3 for more information about each management segment.

Restrictions placed on downtown waterfront by both the CBEMP and the Coos Bay Comprehensive Plan limit the development potential of the area. Given the access barriers to this segment created by Highway 101 and the railroad, waterfront visitation may be limited without the draw of dining, lodging, and shopping, none of which are allowed under current land use designations.

Recommendations

In accordance with other recommendations in this document, the City of Coos Bay should revise its Comprehensive Plan, Land Development Ordinance, and accompanying maps to redesignate waterfront areas, particularly the downtown waterfront and the Eastside property owned by the Oregon International Port of Coos Bay. This analysis (Chapter 4, Regional Land Needs) indicates limited demand for water-dependent or -related industrial land in both areas, and both areas are well suited for other types of development (commercial, residential, recreational, and/or a mix of uses that may include industrial).

The City of Coos Bay, coordinating with Coos County and the City of North Bend, should redesignate the downtown waterfront area to allow a mix of uses. Implementation of a floating zone, which ensures
a specified amount of land remains for water-dependent or -related uses, should be considered. An example floating zone ordinance is included in Appendix B.

The City of Coos Bay, in coordination with Coos County, should redesignate the Eastside property for residential and commercial uses, as currently proposed by the Oregon International Port of Coos Bay.

The City should assess the impacts of Measures 5 and 50 on implementing its Urban Renewal Plan. Decisions to pursue funding mechanisms other than property taxes should be coordinated with North Bend and Coos County to prevent one jurisdiction from “undercutting” the others and to encourage economic development throughout the region.

Coos Bay Empire District Urban Renewal Report
The Empire District Urban Renewal Plan emphasizes improvements in physical environment to encourage commercial development. No provisions are made for industrial development within the Plan area. The Report does not acknowledge or address conflicts with the CBEMP.

The Urban Renewal District includes two shoreland segments covered in the CBEMP: Segment 54 UW and Segment 55 UD. Management objectives outlined in Segment 54 UW allow for recreation use, but give priority to water-dependent industrial and commercial uses. It is unclear if development of the area for recreation would be permitted without compliance with the expressed management objectives of the CBEMP.

Similar to the City of Coos Bay Urban Renewal Plan, the Coos Bay Empire District Urban Renewal Plan relies on tax increment financing to fund most proposed projects. The property tax limitations of Ballot Measures 5 and 50 could severely limit the City of Coos Bay’s ability to finance implementation of the Plan.

Recommendations:
The City should assess the impacts of Measures 5 and 50 on implementing its Empire District Urban Renewal Plan. Decisions to pursue funding mechanisms other than property taxes should be coordinated with North Bend and Coos County to prevent one jurisdiction from “undercutting” the others and to encourage economic development throughout the region.

North Bay Urban Renewal Plan and Report
The North Bay Urban Renewal Plan is a phased project to be implemented from 1988 through 1997. Projects are related to improving infrastructure on the North Spit. Proposed projects include: road and rail bed extensions and improvements, construction of sewer treatment facility, increased wastewater capacity and increased water capacity. The Plan also includes provisions for the development of a marshaling yard and mitigation of impacts related to implementation of the Plan.

The report indicates two key issues related to the economic hardship experienced in the area: lack of infrastructure, and changes in the demand and availability of the area’s resource-related goods.
The Plan provides guidance on the type of improvements that need to be made and prioritizes those projects. It addresses the serious limitations on infrastructure in the area. The Plan also avoids overextending the fiscal resources of Bay Area jurisdictions by deferring improvements until they are in demand. The structure and approach of the Plan focuses on attracting large-scale enterprises (in terms of physical size and production output), which would stimulate the greatest amount of job growth. Such an approach is attractive, but it risks diverting attention from other economic strategies that support development and retention of new and existing locally-based businesses. Local businesses are often smaller in scale than outside-held enterprises, but when taken together, these businesses often employ a greater amount of the workforce than larger enterprises.

The Plan only briefly addresses problems with the area's overland transportation system. Though local government agencies may have limited power to make necessary repairs to state-owned and maintained roads, deficiencies in these systems can have serious implications for the economic development of the area.

**Recommendations**

As presented in Appendix A (Regional Site Availability, Target Sites, North Bay Marine Industrial Park), a method to attract smaller businesses to the North Spit would be to allow the siting of businesses on the site in advance of marine terminal construction, with the condition that the businesses are manufacturers or shippers that utilize or intend to utilize existing marine terminals in the Bay Area. Such businesses would depend upon the presence of the water and its deep-draft channel, but would use efficiencies of scale by shipping via existing terminals in the area rather than on-site. This strategy would enable the Port to build a collection of businesses toward the "critical mass" of uses necessary to justify the expense of constructing a marine terminal on the North Spit. In addition to adjacency to the deep-water channel, such an operation would require berth space and back land to support the transfer and storage needs of multiple users.

Coos County, the cities of North Bend and Coos Bay, and the Oregon International Port of Coos Bay should coordinate efforts to extend adequate public services and transportation facilities to industrial sites on the North Spit. Planned extension of a 500 kv power line to the area will increase its industrial development potential. However, sewer facilities should be extended to the North Spit, and road improvements should be made, both on the spit and to highways in the area. Highway improvements will require continued coordination with ODOT.

Much of the North Spit is designated for ESWD uses, although most of the acreage is located well away from the waterfront. As discussed in Chapter 4, under Water-Dependent Land Needs, water-dependent or related uses do not need a great deal of back land (a maximum of 50 to 75 acres). Bay Area jurisdictions should redesignate portions of the North Spit to allow non-water-dependent or related uses, and retain ESWD zoning for areas fronting the water and enough back land to support water-dependent uses.

**Bay Area Transportation Study, December 1995**

By the year 2015, parts of the state highway system in the Bay Area will be experiencing congestion. Most of the highway traffic will be passing through the area, although increased development in the area...
will add local traffic. The BATS identifies approximately $180 million in needed improvements, $60 million of which are for improvements to McCullough Bridge.

The BATS recommends the use of SDCs and a local gas tax to fund much of the needed improvements. SDCs are typically used in areas experiencing high development activity, and their use is restricted to funding expansion projects only, not improvements. (Revenue from gas taxes do not have this same restriction.) Currently the Bay Area is experiencing relatively little development. SDCs would increase the cost of development in the Bay Area and may act as a disincentive to development. On the other hand, reliance on state funding for state highway improvements could be problematic, given the current lack of willingness of the state legislature to provide increased funding for ODOT to pay for needed highway improvements.

Recommendations
The cities of North Bend and Coos Bay should continue to coordinate with Coos County and ODOT to improve efficiency of the existing transportation system.

Bay Area jurisdictions should consider adopting maintenance agreements to ensure coordinated, efficient maintenance of local transportation facilities. Maintenance agreements should be used to set priorities for facilities to be maintained, schedule maintenance, assign maintenance responsibility, etc.

Bay Area jurisdictions should evaluate proposed development, as well as proposed revisions to local plans and ordinances, in relation to the transportation system and should ensure that any identified transportation improvement needs can be met.

Other Documents
Several Bay Area plans and documents, in addition to those discussed in this Chapter, were reviewed for compatibility with regional economic objectives. If no significant conflicts were identified, the documents were not addressed in this Chapter. Those documents, which are discussed in Chapter 3, include:

- Coos Bay-North Bend Water Board Revised Water Demand Forecast
- North Bend Subdivision Ordinance
- City of Coos Bay Goals
- Oregon International Port of Coos Bay Strategic Business Plan
- North Bend Municipal Airport Plan

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CHAPTER 7: REFERENCES

DOCUMENTS

Aerial maps: Coos Bay, Eastside, North Bend, and Vicinity. April 1996.


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INTRA. *Coos County Tourism Strategic and Implementation Plan.* June 1996.


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North Bend, City of. *Zoning Map.*

North Bend, City of. *Zoning Ordinance of the City of North Bend.*


Oregon Land Conservation and Development Commission. *Oregon Administrative Rules, Chapter 660, Division 4.*


PERSONAL COMMUNICATIONS


Evenden, Patty, Planning Director, and Carol Parker, Assistant Planning Director, Coos County. Interview. June 10, 1997.


Roth, Sam, Associate Broker, Century 21 Best Realty, Inc. Interview. September 17, 1997.


Toby, Emily, Department of Land Conservation and Development. Statements made during November 4, 1997, meeting with representatives of Coos Bay, North Bend, Coos County, Shoji Planning and Development, and David Evans and Associates, Inc.
APPENDIX A

REGIONAL SITE AVAILABILITY
INTRODUCTION

This inventory provides an overview of land use in the Bay Area. It assesses the existing land use patterns in the Bay Area and includes a compilation of information on industrially and commercially zoned sites deemed appropriate for development. The inventory was prepared with existing plans, studies, and inventories of the Bay Area that have been prepared primarily within the past 10 years, although the most recent information was emphasized. Such existing documentation was supplemented with interviews of local property owners, agency representatives, and others having information regarding specific sites, area plans, and related information.

STUDY AREA

The inventory study area encompasses the cities of North Bend and Coos Bay, as well as Charleston and other unincorporated areas in the Bay Area. The study area extends west approximately to the Bastendorff Beach County Park, south to the South Slough Reserve, east to the Coos River Highway bridge (at Myrtlewood Lane), and north to Marine Way. One additional area, outside these boundaries, was also included in the study: an industrial area located north of the Bay Area along Highway 101, locally known as the “Riley/McKeown” properties.

METHODOLOGY

The information presented in this inventory was provided by the Bay Area Economic Development Council (BAEDC) Site Survey 1993 and additional BAEDC materials, the North Bend 1995 Comprehensive Plan, North Bend Industrial Site Survey, City of Coos Bay Comprehensive Plan 2000, Coos Bay Estuary Management Plan (CBEMP), City of North Bend Urban Renewal Plan, Coos Bay Empire District Urban Renewal Plan, Coos County Comprehensive Plan, and information gathered from various interviews with property owners, the Oregon International Port of Coos Bay, and Coos Bay, North Bend, and Coos County officials. The information from these sources is deemed to be reliable and credible.

In compiling the land use inventory, all available, vacant or underutilized industrial and commercial sites found in the above-mentioned sources were collected and tabulated. The following information is provided on each industrial site:

♦ Site Source: Each site selected was derived from a specific information source. A reference number is assigned to each site. Forty-one sites refer to the BAEDC Site Survey and other BAEDC information. These numbers range from BAEDC-1 to BAEDC-61. Sites BAEDC 1 through 57 are consistent with the Site Survey numbers. Some sites included in the Site Survey are not within the geographic scope of the study area and, therefore, were omitted from this inventory. Seven sites refer to the North Bend Industrial Site Survey. These numbers range from 4-4 to 4-15 and are references to the CBEMP. Eight numbers refer to “other” sources, primarily interview information from property owners and local officials. These numbers range from O-1 to O-14. A key is provided that contains each individual site’s reference number, site name, and site location.

♦ Target Site: A notation (X) indicates that a site has been selected for site-specific field analysis.
Jurisdiction: Site location is given as either Coos County (unincorporated), the City of Coos Bay, or the City of North Bend.

Transportation Access: A notation (X) indicates each type of transportation access available to the site. Access type includes rail, shipping, local roads, and Highway 101.

Utility Access: A notation (X) indicates each type of utility access to the site. Utilities include sewer, water, and electricity. (Natural gas is currently unavailable in the Bay Area.)

Adjacent Land Use: A notation (X) indicates each type of land use adjacent to the site. These include residential, commercial, industrial, and resource land uses.

Barriers to Development: A notation (X) indicates whether a site is located in a flood plain, in sloped terrain, wetlands, or tidelands, or if the parcel size is less than one acre.

Current Zoning: Current zoning is indicated for each site. The zoning code refers to the corresponding jurisdiction. If the site is located within a CBEMP management segment, the segment number is noted.

Ownership: A notation (X) indicates the ownership status of the property (public, private, or multiple ownership).

Improvements: Information, if available, about on-site structures and if they are occupied, is shown. Also noted is whether the site is vacant or occupied.

Additional Comments: This row provides any additional information about the site (e.g., factors that may affect availability for development).

Estimates of total acreage for residential, commercial, and industrial lands were derived from data found in each jurisdiction’s comprehensive plan. There is some disparity amongst these figures. The North Bend 1995 Comprehensive Plan, adopted in 1979, states that there are 1,042 acres of industrially zoned land. A review of the North Bend’s industrial areas occurred as part of the periodic review process in 1989. The updated information revealed that approximately 380 acres are zoned as industrial in North Bend. For the purposes of this inventory, the 380-acre figure was used, as it appears to be the most accurate.

Disparities also occurred between figures provided by the BAEDC Site Survey and figures in the North Bend Industrial Site Survey regarding acreage on the North Point property bounded by the McCullough Bridge on the east and the Central Oregon and Pacific Railroad right-of-way on the west and south. The North Bend Industrial Site Survey data indicate that approximately 130 acres of land exists on the North Point. According to BAEDC figures, the North Point property is approximately 65 acres. This inventory uses the more recent figures provided by the BAEDC Site Survey.
GENERAL INVENTORY FINDINGS

Based on the information compiled for this inventory, the Bay Area study area incorporates a total of 2,250 acres of land zoned for industrial uses, 490 acres zoned for commercial uses, 4,090 acres zoned for residential uses, and 2,100 acres included in CBEMP management areas that allow industrial and/or commercial development. Total acreage, by land use, is shown in Table A-1.

TABLE A-1
ESTIMATED TOTAL OF INDUSTRIAL, COMMERCIAL, AND RESIDENTIAL LAND—BAY AREA STUDY AREA

<table>
<thead>
<tr>
<th>Jurisdiction</th>
<th>Industrial (acres)</th>
<th>Commercial (acres)</th>
<th>CBEMP Mgmt. Segs.* (acres)</th>
<th>Residential (acres)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Coos County (within study area)</td>
<td>940</td>
<td>50</td>
<td>2,100</td>
<td>1,850</td>
</tr>
<tr>
<td>City of Coos Bay</td>
<td>930</td>
<td>250</td>
<td>(included in City total)</td>
<td>810</td>
</tr>
<tr>
<td>City of North Bend</td>
<td>380</td>
<td>190</td>
<td>(included in City total)</td>
<td>1,430</td>
</tr>
<tr>
<td>Bay Area Total</td>
<td>2,250</td>
<td>490</td>
<td>2,100</td>
<td>4,090</td>
</tr>
</tbody>
</table>

*Includes only unincorporated shore/land management areas that allow industrial and/or commercial uses.

Sources: City of Coos Bay Comprehensive Plan 2000, City of North Bend 1995 Comprehensive Plan, Coos County Comprehensive Plan, and local jurisdictional maps.

Based on the information available in the BAEDC Site Survey, the North Bend Industrial Site Survey, and information gathered from interviews with local property owners and officials, the inventory of available industrial and commercial land indicates that a large percentage (approximately 71 percent) of developable land is within the jurisdiction of Coos County. Table A-2 shows available commercial and industrial land, according to jurisdiction. Table A-3 indicates the number of available sites, categorized by size, in each jurisdiction.

TABLE A-2
ESTIMATED AVAILABLE INDUSTRIAL AND COMMERCIAL LAND—BAY AREA STUDY AREA

<table>
<thead>
<tr>
<th>Jurisdiction</th>
<th>Available Industrial and/or Commercial Land</th>
<th>Percentage of Total Available Industrial and/or Commercial Land</th>
</tr>
</thead>
<tbody>
<tr>
<td>Coos County (within study area)</td>
<td>1,050 acres</td>
<td>71%</td>
</tr>
<tr>
<td>City of Coos Bay*</td>
<td>200 acres</td>
<td>14%</td>
</tr>
<tr>
<td>City of North Bend</td>
<td>220 acres</td>
<td>15%</td>
</tr>
<tr>
<td>Total</td>
<td>1,470 acres</td>
<td>100%</td>
</tr>
</tbody>
</table>

*Includes Eastside Industrial area, 114 acres proposed for rezone.

Sources: BAEDC Site Survey 1993, City of North Bend 1995 Comprehensive Plan, BAEDC information; interviews with property owners and city and county officials.
<table>
<thead>
<tr>
<th>Jurisdiction</th>
<th>Total Number of Sites (approx.)</th>
<th>1-10 Acres</th>
<th>10-40 Acres</th>
<th>40-100 Acres</th>
<th>100+ Acres</th>
</tr>
</thead>
<tbody>
<tr>
<td>City of Coos Bay</td>
<td>35</td>
<td>29</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>City of North Bend</td>
<td>13</td>
<td>7</td>
<td>4</td>
<td>2</td>
<td>0</td>
</tr>
<tr>
<td>Coos County (within study area)</td>
<td>10</td>
<td>2</td>
<td>1</td>
<td>3</td>
<td>4</td>
</tr>
</tbody>
</table>

Sources: BAEDC Site Survey 1993, City of North Bend 1995 Comprehensive Plan; BAEDC information, interviews with property owners and city and county officials.

Coos County

There are several large, contiguous blocks of available industrial land located on the North Spit within Coos County. Land use and development are regulated by the CBEMP, which allows water-related or water-dependent industrial uses on the North Spit sites included in the inventory. Primary access to these sites is from TransPacific Parkway, the main two-lane highway that serves the North Spit. Public sanitary service is currently not available to the North Spit sites.

Other large blocks of available industrial land in Coos County are found at the Sitka Dock Site located on the east side of the lower bay, adjacent to Cape Arago Highway, and south of the Coos Bay city limits; and property south of Bunker Hill and west of Isthmus Slough along Highway 101.

City of North Bend

There are large tracts of contiguous, developable, industrial land under the southern end of the McCullough Bridge within the City of North Bend. The area is bounded on the north, east, and west by the Coos Bay Estuary. Residential and commercial developments lie to the south. Primary access to the area is from Highway 101. The area also has access to rail and shipping transportation services. Sewer, water, and electric services are available to the area.

There are industrial sites available in the North Bend downtown waterfront area. The sites fall within the boundary of the North Bend Urban Renewal Plan. They range in size from approximately 24 acres to less than one acre.

There are also available industrial/commercial sites in the City of North Bend’s Airport Business Park, which is adjacent to the North Bend Municipal Airport.

City of Coos Bay

According to the findings of this inventory, the City of Coos Bay has a limited supply of large available sites zoned for industrial and commercial uses. Most of the undeveloped sites in the City of Coos Bay are parcels of less than 10 acres under separate ownership. The majority of these sites are clustered along Highway 101, Ocean Boulevard, and Cape Arago Highway on the city’s west side.
Short-Term Availability
Sites were considered to be unavailable for development in the short term if they are not serviceable, if there is inadequate site access, or if they have environmental constraints (e.g., steep slopes or wetlands) present. Sites within the flood plain were not excluded from short-term availability. Using the information compiled in Table A-4 (at the back of this document), sites with such constraints were removed from the inventory, resulting in significantly fewer acres available for short-term development, as indicated on Page 8 of Table A-4 and in Table A-5 (also located at the back of this document).

TARGET SITES
Fourteen target sites were selected by the steering committee which provided input for the Bay Area Comprehensive Economic Analysis. Each target site's suitability for industrial or commercial development was evaluated. A description of the site’s location, transportation and utility access, adjacent land uses, current zoning and ownership is provided. A brief discussion of any barriers to development is included along with a summary of the potential for industrial and commercial development of the site.

North Bay Marine Industrial Park

Location/Jurisdiction
The North Bay Marine Industrial Park is a rectangular-shaped, 165-acre site located on the eastern shore of the North Spit peninsula of Coos Bay. The site is within the planning jurisdiction of Coos County. The property is located outside the urban growth boundary (UGB) and city limits of Coos Bay and North Bend. It is referred to as site number BAEDC-1 in Tables A-4 and A-5, presented at the end of this memorandum.

Transportation Access
The North Bay Marine Industrial Park is approximately five road-miles west and south of US Highway 101. TransPacific Parkway, an all-weather paved road, runs approximately 9 miles north and east along the property and connects with Highway 101 1.4 miles north of the McCullough Bridge.

The Central Oregon and Pacific Railroad line is approximately 3.5 miles northeast of the park. The TransPacific Parkway corridor was designed to provide an extension of a rail spur to the park.

The property has 6,000-feet of bay frontage on the Coos Bay deep-draft shipping channel, which has been maintained at a depth of 35 feet by the US Army Corps of Engineers (ACOE). Authorization to maintain a 37-foot depth is expected in November 1997. Marine facilities currently in place include a general purpose utility dock and a heavy-lift deadload barge slip which can be modified to accommodate ocean-going vessels.

Utility Access
Electric and water services are currently available on site from local utility suppliers. Pacific Power can provide up to 4,000 KVA from its existing South Dunes Substation. The Coos Bay/North Bend Water Board can provide up to one million gallons per day from existing 12-inch lines. Public sanitary service
is currently not available to the North Spit area. Service can be developed on site using gravel filter system for light-demand water users. Heavy-demand sewer service may be developed through the Urban Renewal District.

**Adjacent Land Uses**
The site is within CBEMP managment segment 3E WD. North of the site is industrial land owned by Weyerhaeuser and Roseburg Forest Products. The Bureau of Land Management owns industrial property west of the site. An aquaculture facility is located on the south boundary of the site, and the estuary deep-draft channel is east and south.

**Barriers To Development**
There are no physical barriers to inhibit development of the site. The site is generally flat and easily graded. The soil is primarily sand and gravel with some bedrock. The site has excellent load bearing capacity. The site encompasses approximately 13 acres of wetlands near the TransPacific Parkway. The size and location of this area should not be detrimental to industrial development of the site. However, land use restrictions and development costs negatively affect the site's development potential, as discussed below.

**Current Zoning**
The site is zoned Water-Dependent Shorelands (CBEMP Management Segment 3E WD). The site is intended to be developed for industrial/commercial uses that are water-dependent or related. The site is located within the boundaries of the Bay Area Enterprise Zone (property tax abatement) and the Urban Renewal District (tax increment district/infrastructure financing). The site is included in the Port's Foreign-Trade Zone #132 (custom duty exemptions/credits).

**Ownership**
The Oregon International Port of Coos Bay currently owns the North Bay Marine Industrial Park. The property can be subdivided at Port Commission discretion dependent on proposed site usage and planned improvements.

**Summary Of Industrial/Commercial Development Potential**
The North Bay Marine Industrial Park is well-suited for industrial development. The size and shape of the property lends itself to development of small individual industrial activities, large-scale operations, or a combination of both. The site is adjacent to approximately 380 acres of additional vacant and available land (the North Bay Industrial Development Site, BAEDC-2) which can accommodate future expansion of industrial uses.

The site has access to transportation infrastructure, which would benefit industrial development. The property is located approximately 5 miles southwest of Highway 101 along the TransPacific Parkway. The property has access to approximately 6,000 feet of frontage on the Coos Bay estuary deep-draft shipping channel and is strategically located six miles from the harbor entrance, so that vessels would not have to pass under any bridges.
Existing roads and utilities, with the exception of sanitary sewer, are adequate to facilitate development of the site. Connection to sanitary sewer service, however, would expand the types of uses that the site could accommodate. A goal exception has been taken which allows sewer extension to the site.

The site is zoned as Water-Dependent Development Shorelands, which restricts industrial uses of the site to those that rely or relate to the estuary channel (i.e., especially suited for water-dependent [ESWD] uses). The zoning limits the potential industrial uses that the site can accommodate, given its favorable size, location, and physical characteristics. This is of particular concern for the portion of the site located away from the water.

Port officials have expressed concern about the ESWD designation over the entire 165-acre site, although most of the acreage is located well away from the waterfront. The North Bay Marine Industrial Park is the only large piece of undeveloped, relatively flat industrial land in the Coos Bay/North Bend region. (Smaller parcels are available at the North Bend Airport Business Park.) This means that the Port has no property on which to locate non-water-dependent industries and must send them looking elsewhere. Such businesses usually locate out of the Bay Area.

The other significant barrier to development of the Port site is the cost of developing a marine terminal. The CBEMP allows for creation of up to 2,000 feet of bulkhead for a dock facility, together with 19 acres of backfill (although Section 404 Permit work has not yet been initiated). However, the minimum cost to develop a marine terminal is estimated at $20 million. To amortize this expense, either a major industrial user must come forward, or the demand for marine terminal space is the region must exceed the supply. The Port has only infrequently entertained a client of sufficient size or scale of project to justify the construction of a terminal. The typical experience of the Port has been that a client cannot wait the two or three years required to achieve 404 Permit and environmental approval (preparation and approval of an environmental impact statement) for a new terminal before making its site selection decision. Therefore, potential clients usually choose to locate elsewhere, out of the Bay Area.

A potential remedy may be to allow the Port to site businesses on the site in advance of terminal construction, possibly with the condition that the businesses are manufacturers or shippers that utilize or intend to utilize existing marine terminals in the Bay Area. Such businesses would depend upon the presence of the water and its deep-draft channel, but would use efficiencies of scale by shipping via existing terminals in the area rather than on-site. This strategy would enable the Port to build a collection of businesses toward the “critical mass” of uses necessary to justify the expense of constructing a marine terminal on the North Spit.

North Bay Industrial Development Site

Location/Jurisdiction

The North Bay Industrial Development site is a 380-acre parcel located on the North Spit peninsula of the Coos Bay estuary. The site is within the planning jurisdiction of Coos County and is located outside the UGB and the city limits of Coos Bay and North Bend. It is referred to as site number BAEDC-2 in Tables A-4 and A-5, at the end of this appendix.
Transportation Access
The North Bay Industrial Development Site is approximately five road-miles west of US Highway 101. Primary access to the site is from the TransPacific Parkway which runs along its west and north borders and connects with Highway 101 on the north side of the bay.

The Central Oregon and Pacific Railroad line is located approximately one-half mile east of the property. The TransPacific Parkway corridor was designed to provide an extension of a rail spur to serve properties on the North Spit.

The property has approximately 3,000 feet of frontage on the Coos Bay deep-draft shipping channel. The channel is maintained at a depth of 35 feet by the ACOE, and will soon be authorized for maintenance at a depth of 37 feet. There are no existing marine terminals or docks serving the property.

Utility Access
Electric and water services are currently available on-site from local utility suppliers. Pacific Power can provide up to 4,000 KVA of electrical service to the site. The Coos Bay/North Bend Water Board provides water to the site. Public sanitary sewer service is currently not available to the North Spit area. Service can be developed on-site using a gravel filter system for light-demand water users. Heavy-demand sewer service may be developed through the Urban Renewal District.

Adjacent Land Uses
The site is within a CBEMP management segment. North of the site is the Weyerhaeuser wetland mitigation area. Roseburg Forest Products owns industrial land east of the site, and the Bureau of Land Management owns industrially-zoned property west of the site. The Coos Bay channel and the North Bay Marine Industrial Park are south of the site.

Barriers To Development
There are no physical barriers to inhibit development of the site. The site is relatively level and is covered mostly with coastal vegetation and sand. The site's soil types are predominantly sand- and gravel-related, with some bedrock, but no organic material. The site is bounded on the east by a 100-foot mean sea level (MSL) sand ridge, on the north by the TransPacific Parkway, on the west by a 20-foot MSL sand ridge, and on the south by the bay. There are 110 acres of adjacent wetlands that are developable subject to agreement with state and federal agencies.

According to Jim James, Environmental Engineer, and Fred Cassidy, Manager of the Weyerhaeuser Paper Mill, a mitigation agreement exists on the Weyerhaeuser Henderson Marsh property that places development requirements on the North Bay Industrial Development site. A possible impediment to industrial development on the site is a proposal for a sports park on the North Spit that would border the North Bay Industrial Development site. The Bureau of Land Management and Coos County Parks and Recreation are considering developing a sports park that would require using the TransPacific Parkway as an access road. Use of the industrial access road by recreationists might hinder future industrial development on the site.
**Current Zoning**

The site is zoned Water-Dependent Development Shorelands by the CBEMP (Management Segments 5WD and 6WD) and is intended to be developed for industrial/commercial uses that are water-dependent or -related. The site is located within the boundaries of the Bay Area Enterprise Zone (property tax abatement), the Urban Renewal District (tax increment district/infrastructure financing), and is partially within the Port's Foreign-Trade Zone.

**Ownership**

The North Bay Industrial Development Site is owned by the Weyerhaeuser Company.

**Summary Of Industrial/Commercial Development Potential**

The North Bay Industrial Development site is well-suited for industrial development. The size and shape of the property lends itself to development of small individual industrial activities, large-scale operations, or a combination of both. The site is adjacent to approximately 165 acres of additional vacant and available land which can accommodate future expansion as an industrial park. The site is buffered from adjacent industrial land uses by a 100-foot MSL sand ridge.

The 380-acre site offers ample frontage to the TransPacific Parkway and to Coos Bay. The property is located approximately 5 miles to the west of Highway 101 along the TransPacific Parkway. The site has access to approximately 3,000 feet of frontage on the Coos Bay deep-draft shipping channel and is strategically located six miles from the harbor entrance, so that vessels would not have to cross under any bridges.

Existing roads and utilities, with the exception of sanitary sewer, are adequate to facilitate the development of the site. City sewer service, however, would expand the types of uses that the site could accommodate. Under an existing goal exception, sewer service can be extended to the site.

The site's zoning restricts industrial uses to those that rely or relate to the water. This zoning limits the potential industrial uses that the site can accommodate, given its favorable size, location, and physical characteristics. This is of particular concern for the portion of the site located away from the water.

The future industrial potential of the site may be encumbered if a sports park is located adjacent to the property.

**Roseburg Forest Products Industrial Site**

**Location/Jurisdiction**

The 250-acre Roseburg Forest Products Industrial Site is located on the northern portion of the North Spit area. The site is within the planning jurisdiction of Coos County. The property is located outside the UGB and the city limits of Coos Bay and North Bend. It is referred to as site BAEDC-5 in Tables A-4 and A-5.

The site has more than 290,000 square feet of available warehouse space. Roseburg Forest Products currently operates a woodchip-processing, log storage, and ship-loading facility on the site.
Transportation Access
The Roseburg Forest Products Site is approximately two road-miles west of US Highway 101. Primary access to the site is from the TransPacific Parkway, which runs along its northern border and connects with Highway 101 on the north side of the bay. A private road runs along the eastern and southern borders of the property.

Central Oregon and Pacific Railroad spurs are on-site.

The property has deep-draft dock facilities for ship loading. These facilities are currently in use by Roseburg Forest Products. According to Allyn Ford of Roseburg Forest Products, the dock facilities are not available for lease. Additional dock facilities could potentially be developed, although they would be costly. (Refer to the discussion of terminal construction under the North Bay Marine Industrial Park.)

Utility Access
Electric and water services are currently available on-site from local utility suppliers. The Coos Bay/North Bend Water Board provides water to the site. Public sanitary sewer service is currently not available to the North Spit area. Service can be developed on site using a gravel filter system for light-demand water users. Heavy-demand sewer service may be developed through the Urban Renewal District.

Adjacent Land Uses
The site is within CBEMP management segment 6 WD. The Bureau of Land Management owns industrial property north of the site. The Coos Bay channel and the North Bay Industrial Development Site are south of the site. East and west of the site are vacant Weyerhaeuser industrial parcels.

Barriers To Development
There are no physical barriers to inhibit development of the site. The developed areas of the site are on flat, sandy, well-drained soils. Some undeveloped areas are natural sand dunes.

According to Allyn Ford of Roseburg Forest Products, there are three separate buildings available for lease on the site. A current tenant utilizes some of the warehouse space. Future tenant use would need to be compatible with current industrial operations. The property is not available for leases over five years in length, a disincentive for potential tenants to invest in much development on the site.

Current Zoning
The site is zoned Water-Dependent Development Shorelands in the CBEMP (Management Segment 6 WD). The site is intended to be developed for industrial/commercial uses that are water-dependent or related.

The site is located within the boundaries of the Bay Area Enterprise Zone (property tax abatement), the Urban Renewal District (tax increment district/infrastructure financing), and the Port's Foreign-Trade Zone.
Ownership
The Roseburg Forest Products Industrial Site is owned by Roseburg Forest Products.

Comments
The site has over 290,000 square feet of available warehouse space. The Coos Bay Industrial Building is 120,000 square feet. It is surrounded by paved and gravel areas, with an additional wood structure approximately 60 feet east of the building. Other structures on the site include various storage and processing buildings, office and maintenance facilities, a wood chip mill and log storage.

Summary Of Industrial/Commercial Development Potential
The Roseburg Forest Products Industrial site is well-suited for industrial development. The size and shape of the property lends itself to development of small individual industrial activities, large-scale operations, or a combination of both. The site is adjacent to approximately 380 acres of additional vacant and available land which can accommodate future expansion as an industrial park.

The 250-acre site offers ample frontage to the TransPacific Parkway and to Coos Bay. The property is located approximately 2 miles to the west of Highway 101 along the TransPacific Parkway.

Existing utilities, with the exception of sanitary sewer, are adequate to facilitate the development of the site. Connection to city sewer service, however, would expand the types of uses that the site could accommodate. Connection to a municipal sanitary sewer system would require that the property be included in the UGB or would require a goal exception approved by the Department of Land Conservation and Development (DLCD).

The site is zoned as Water-Dependent Development Shorelands, which restricts industrial uses to those that rely or relate to Coos Bay. This zoning limits the potential industrial uses that the site can accommodate, given its favorable size, location, and physical characteristics. This is of particular concern for the portion of the site located away from the water.

The existing 120,000 square foot building is located on the northwest portion of the property, and is surrounded by woodchip processing, log storage and ship loading operations. Currently, no separate access road exists that would separate the vacant building from these adjacent land uses. Therefore, the vacant warehouse site is most suitable for a compatible heavy manufacturing or warehousing use.

The property is not available for long-term leasing. Roseburg Forest Products would like to maintain their own option to use the property for the long-term. The lack of long-term leasing affects development potential of the site, as potential tenants would likely be unwilling to invest much if they are uncertain how long they will be allowed to remain on-site.

North Point Industrial Park—Al Pierce Lumber Company Site

Location/Jurisdiction
The North Point site is a 117-acre total site located under the southern end of the McCullough Bridge, within the city limits of North Bend. The western portion of the site is owned by the Al Pierce
Company. The eastern portion of the site is owned by Umpqua River Navigation. The Al Pierce site consists of two areas containing approximately 34 and 36 acres, and separated in an east-west direction by a 19-acre tideland lagoon. It is referred to as site number BAEDC-3 in Tables A-4 and A-5.

Transportation Access
General access to the site is provided by Highway 101 at the south end of the McCullough Bridge. Local access to the site is provided by Chapel Parkway. The westerly portion of the site is currently only accessible by rail.

The Central Oregon and Pacific Railroad mainline crosses the site. There is a 20 foot-wide Southern Pacific Railroad spur tract easement running easterly through the lower southern portion of the eastern parcel.

Currently, marine facilities do not exist. The site has ample bay frontage and shipping channel frontage which could be utilized for marine access facilities.

Utility Access
Electric and water services are currently available on-site from local utility suppliers. The Coos Bay/North Bend Water Board supplies water to the site through an existing 8-inch water main in Chapel Parkway extending to the eastern edge of the site.

Sanitary service to the North Point area is provided by the City of North Bend. Gravity sanitary sewer service is available to the site.

Adjacent Land Uses
The Coos Bay estuary surrounds the site on the north, east and west. Ferry Road Park and North Bend residential and commercial developments are to the south.

Barriers To Development
The site has configuration constraints which would impede industrial development requiring large contiguous building areas. The site consists of two filled-in tideland areas containing approximately 36 and 34 acres each, which are physically separated in an east-west direction by a 19-acre tideland lagoon. Both parcels have been filled to an average elevation of about 25 feet above mean sea level with dredge spoils consisting of fine sand mixed with various sea shell types.

The west parcel of the site is only accessible by rail because the lagoon isolates it from roads and other urban services. The eastern portion of the site is served by the full range of urban services.

The site is subject to restrictions imposed by the FAA for the North Bend Airport. Structures above 164 feet in elevation must be reviewed by the FAA to determine whether or not the structure will constitute an obstruction and/or hazard to navigation.
**Current Zoning**
The site is zoned Heavy Industrial (MH) by the City of North Bend; it lies within CBEMP Management Segment 48 UW. The CBEMP restricts development along the shoreline to water-dependent or water-related industrial uses. Development beyond or setback from this shoreline would not be subject to this requirement.

The site is located within the boundaries of the Bay Area Enterprise Zone (property tax abatement).

**Ownership**
The property is owned by the Al Pierce Lumber Company.

**Summary Of Industrial/Commercial Development Potential**
The North Point Industrial Park is potentially the largest available vacant industrial site within the City of North Bend. The site is well-suited for water-dependent/water-related industrial uses due to its proximity to Highway 101, Coos Bay shipping channel, and the City of North Bend. The site also has immediate access to water, power and sewer services and local road infrastructure.

The site is constrained by its physical configuration. The 19-acre lagoon separates the site into two parcels, limiting the feasibility of developing large-scale industrial facilities. In addition, the 36-acre site currently does not have road access or urban services.

**North Point Industrial Park—Umpqua River Navigation Site**

**Location/Jurisdiction**
The North Point site is a 117-acre site located under the southern end of the McCullough Bridge, within the city limits of North Bend. The western portion of the site is owned by the Al Pierce Company. The eastern portion of the site is owned by Umpqua River Navigation. The Umpqua River Navigation site has approximately 30 usable acres. Approximately 10 acres are on the west side of the Highway 101 right-of-way, and 27 acres are on the east side of the Highway 101 right-of-way. Approximately 10 acres are in tidal areas. It is referred to as site number BAEDC-45 in Tables A-4 and A-5.

**Transportation Access**
General access to the site is provided by Highway 101 at the south end of the McCullough Bridge. Local access to the site is provided by Ferry Road at the southeast end of the property. Ferry Road is a fully improved street with curbs and piped drainage systems.

Rail transportation is provided by a Central Oregon and Pacific Rail spur.

Currently, developed marine facilities do not exist. However, there is an historic dock site and an anchorage for barge loading and unloading. According to Tim Lewis of the Umpqua River Navigation Company, the site has experienced significant shoaling, handicapping any barging activities.
Utility Access
Electric and water services are currently available on site from local utility suppliers. The Coos Bay/North Bend Water Board supplies water to the site through an existing 12-inch water main that borders the southern side of the site, extending west of the bridge as an 8-inch main.

Sanitary service to the North Point area is provided by the City of North Bend. The service is suitable for heavy industry users.

Adjacent Land Uses
The Coos Bay Estuary surrounds the north, east and west portions of the site. Ferry Road Park and North Bend residential and commercial developments are to the south.

Barriers To Development
There are no physical impediments to the development of the Umpqua River Navigation site. The property is generally flat and mostly cleared. Soils consist of rock, gravel and dredged material.

The site is subject to restrictions imposed by the FAA for the North Bend Airport. Structures above 164 feet in elevation must be reviewed by the FAA to determine whether or not they will constitute an obstruction and/or hazard to navigation.

Current Zoning
The site is zoned Heavy Industrial (MH) by the City of North Bend. The CBEMP (Management Segment 47 UW) restricts development along the shoreline to water-dependent or water-related industrial uses. Development beyond or setback from this shoreline would not be subject to this requirement.

According to information provided by the BAEDC, the City of North Bend and other regulatory agencies have agreed that the site would be suitable for a tourism-related commercial use.

The site is located within the boundaries of the Bay Area Enterprise Zone (property tax abatement).

Ownership
The property is owned by Umpqua River Navigation Company, Reedsport.

Summary Of Industrial/Commercial Development Potential
The site is well-suited for industrial uses due to its proximity to Highway 101 and the City of North Bend. However, according to Tim Lewis of the Umpqua River Navigation Company, shoaling has occurred on the site inhibiting shipping and barging activities. This may limit the site to non-water-dependent industrial uses.

The scenic setting of the site on the North Point of Coos Bay is also well-suited for tourism-related commercial uses. The site has bay views and wooded lands and parks. According to information provided by the BAEDC, the City of North Bend and other regulatory agencies have agreed that the site would be suitable for a tourism-related commercial use.
North Bend Airport Business Park

Location/Jurisdiction
The North Bend Airport Business Park is a 93-acre planned business park adjacent to the North Bend Municipal Airport. Within this park are available parcels ranging in size from approximately 43 acres to one-quarter acre, with total available acreage estimated at 58 acres. The 43-acre parcel is located on the western edge of the industrial park at the intersection of Colorado and Arthur Street. The business park is owned by the City of North Bend. It is referred to as site number BAEDC-61 in Tables A-4 and A-5. (The BAEDC Site Survey addressed part of the Airport Business Park as a separate site. That site, BAEDC-6, is incorporated in BAEDC-61 in Tables A-4 and A-5.)

Transportation Access
Primary access to the site is from Colorado Avenue, a two-lane arterial. Airport Lane is a local street providing access to smaller parcels within the park. The park is 1.5 miles west of US Highway 101. The Central Oregon and Pacific Railroad mainline is also 1.5 miles east of the site. Rail and marine service are not feasible on this site.

Utility Access
Vacant parcels fronting Airport Lane and Colorado Avenue are currently provided with adequate utility services for development. The undeveloped 43-acre parcel in the western area of the park will require some infrastructure improvements.

Sanitary sewer service to the airport area is provided by the City of North Bend. Gravity service exists to the airport business park, however, the 43-acre parcel will require extension of mains.

Adjacent Land Uses
The site is bound on the north and east by the North Bend Municipal Airport. Coos Bay is to the west and commercial and residential land uses are to the south.

Barriers To Development
There are no physical impediments to development of the site. The small parcels along Airport Lane are generally flat and covered with coastal vegetation. The 43-acre parcel slopes gently to the east with heavy vegetation in most areas.

A level I environmental site assessment for the property has been completed. The study did not identify any issues pertaining to environmental contamination.

There are no known or identified wetlands on the property.

Current Zoning
The site is zoned Airport (AZ) within the City of North Bend which generally permits all airport and airport related uses, as well as light industrial uses such as research and testing laboratories, processing, manufacturing and warehousing. The site is subject to the Airport Approach overlay zone which places
restrictions on building design such as building height and proximity to runways. The industrial park is
designated in the CBEMP as a Business Park.

Ownership
The Airport Business Park is owned by the City of North Bend.

Summary Of Industrial/Commercial Development Potential
The Airport Business Park is well-suited for a wide-array of light industrial uses. Most of the available
parcels have access to roads, utilities, and infrastructure to facilitate industrial development. The 43-acre
lot could accommodate larger industrial requirements once additional access roads and infrastructure is
provided.

Due to the park’s location adjacent to the airport, some restrictions would be placed on building height
and proximity to runways. Some industrial uses on the property may be incompatible with the adjacent
residential neighborhoods on the south side of the park.

Cape Arago Mill Site

Location/Jurisdiction
The Cape Arago Mill site is located in the lower Bay area adjacent to the Empire District of the City of
Coos Bay. The site is approximately 43 acres and is within the planning jurisdiction of the City of Coos
Bay. It is referred to as site number O-6 in Tables A-4 and A-5.

Transportation Access
The Cape Arago Mill site fronts the Cape Arago Highway. The southern portion of the site is accessible
via local streets. There currently is no road access to the northern section of the site. The Central
Oregon and Pacific Railroad line is located approximately five miles from the property. The western
length of the site fronts the Coos Bay. The northern section has a dock which is currently utilized to
moor barges.

Utility Access
Electric, water, and sanitary sewer services are currently provided by local utility suppliers.

Adjacent Land Uses
The site is within a CBEMP management segment. The western length of the site is along Coos Bay.
South of the site are residential and commercial land uses. The City Boat Landing is located just south
of the property. East of the site are residential and institutional land uses.

Barriers To Development
The Cape Arago Mill site has physical impediments to industrial development. According to
information provided by John Sweet of Sause Bros. Inc, the northern section of the site is too narrow for
industrial development. The northern section has been filled with rock and bark. Wetlands probably
exist beneath the fill. Also according to John Sweet, the northern end of the property is bounded by a
bluff that would probably be suitable for waterfront condominiums.
The former Cape Arago Mill was located on the southern end of the property, which is wider than the northern section. The south end is accessible via local roads and currently has a dock that is being utilized to moor barges. Most of the old mill site remains vacant.

**Current Zoning**

The site is zoned Waterfront Industrial by the City of Coos Bay. The northern tip of the property is zoned for high density residential. The Coos Bay Estuary Management Plan designates the site area as Urban Water-Dependent (Management Segment 54 UW). The site is intended to be developed for industrial and commercial uses that are water-dependent or water-related.

**Ownership**

The property is owned by Sause Bros., Inc.

**Summary Of Industrial/Commercial Development Potential**

The southern section of the Cape Arago Mill site is well-suited for industrial development. This section has local road access, a marine dock, and access to the full-range of utility services. The southern end is adjacent to residential land uses which may inhibit some industrial uses of the property.

The northern section of the property is not well-suited for industrial development. The land area is narrow and wetlands probably are present underneath the rock and bark fill. This section also does not currently have local road access.

**Chevron Site**

**Location/Jurisdiction**

The Chevron site is a 2-acre parcel located on a narrow strip of land between Coos Bay and the Central Oregon and Pacific Railroad tracks within the City of Coos Bay. The parcel is located in the northeast section of the City just south of North Bend. It is referred to as site number 0-5 in Tables A-4 and A-5.

**Transportation Access**

Primary road access to the site is from Highway 101. The western length of the site abuts Highway 101. The Central Oregon and Pacific Railroad right-of-way runs along the western side of the Chevron site. The site fronts the Coos Bay deep-draft shipping channel on its eastern side. Marine services include a deep-draft dock.

**Utility Access**

Electric, water, and sanitary sewer services are available on-site from local utility suppliers.

**Adjacent Land Uses**

The site is bound on the north by underutilized industrial property referred to locally as the "Bayshore Property." This property encompasses approximately 4.5 acres. The east side of the site is along Coos Bay. The western length of the property is along the Central Oregon and Pacific Railroad right-of-way and Highway 101. The south side is bounded by tidelands.
Barriers To Development
Due to the site's narrow configuration and small size, industrial development would be limited to small-scale operations. Potential for development on the site also may be hindered by access restrictions and the presence of tidelands on its south side.

Current Zoning
The site is zoned Waterfront Industrial by the City of Coos Bay. The Coos Bay Estuary Management Plan designates the site area as Urban Water-Dependent (44 UW). The site is intended to be developed for industrial and commercial uses that are water-dependent or water-related.

Ownership
The site is owned by Chevron USA, Houston, Texas.

Summary Of Industrial/Commercial Development Potential
The subject property has limited potential for industrial development. The site is encumbered by its narrow configuration and small parcel size. The site is adjacent to 4.5 acres of underutilized industrial property which could offer the opportunity for expansion. The adjacent property is also hindered by its narrow shape. The Chevron site has access to the deep-draft shipping channel and US Highway 101, and is adjacent to the Central Oregon and Pacific Railroad. The property is also within the City limits of Coos Bay. This gives the site access to city services and utilities.

Front Street Proposed Historic Waterfront District

Location/Jurisdiction
The Front Street proposed Historic Waterfront District is located just south of Central Dock and extends south to Market Street and is bounded by Bayshore Drive on its west side. The site comprises several parcels under separate ownership. The site is within the planning jurisdiction of the City of Coos Bay.

Transportation Access
The site is adjacent to Highway 101. Local roads provide general access to the proposed Historic Waterfront District. The site is accessible to the Central Oregon and Pacific Railroad line. The site is along the deep-draft shipping channel of Coos Bay. Developed marine facilities include docks and tie-up facilities for tug boats.

Utility Access
Electric, water, and public sanitary sewer services are available from local utility suppliers.

Adjacent Land Uses
The Central Dock facility is located just north of the proposed Historic Waterfront District. South of the site is the new City of Coos Bay boardwalk. East of the site is the deep-draft shipping channel. Highway 101 (Bayshore Drive) forms the western boundary of the district. Industrial and commercial uses are adjacent to most of the site.
Barriers To Development
According to Coos Bay City Manager Bill Grile, the vision for the Historic Waterfront District is a “Newport-style” mixed-use waterfront. It is the intention of the City of Coos Bay to enhance the current waterfront uses while developing commercial/tourism uses as well. The parcels of property located within the proposed Historic Waterfront District are under separate ownership. This may hinder the overall development plan of the waterfront area. In addition, many of these properties have experienced past industrial uses that may require some environmental cleanup.

Current Zoning
The site is zoned Waterfront Industrial by the City of Coos Bay. The CBEMP designates the site as Urban Water-Dependent (44 UW). The site is intended to be developed for industrial and commercial uses that are water-dependent or water-related.

Ownership
Property within the proposed Historic Waterfront District is under separate private ownership.

Summary Of Industrial/Commercial Development Potential
The proposed Historic Waterfront District site is well-suited for a mixed-use “working-port” commercial development plan. The site is located along the Coos Bay shipping channel and is adjacent to Highway 101. The site is located in between the Central Dock site and the new City of Coos Bay boardwalk. The full range of utility services are available to the site area.

The site is zoned Urban Water-Dependent (UW) in the Coos Bay Estuary Management Plan, restricting industrial uses of the site to those which are water-related or water-dependent. This zoning limits the potential commercial and tourism-related uses that the site might be able to accommodate.

Central Dock

Location/Jurisdiction
Central Dock is located between Highway 101 and the deep-draft shipping channel within the City of Coos Bay. The site is approximately 14 acres. It is referred to as site number 0-1 in Tables A-4 and A-5.

Transportation Access
Primary access to the site is from Highway 101. The deep-draft shipping channel is less than 300 feet from the highway.

The Central Oregon and Pacific Railroad serves the Central Dock site. Two rail spurs access a fully-enclosed 100,000-square foot operations building.

Central Dock is a marine terminal facility. The 1,380-foot dock is situated on Coos Bay’s main shipping channel, which is maintained by the US Army Corps of Engineers at a depth of 35-feet. In addition to the dock, cargo handling services include two rail spurs, a 100,000-square foot operations
building, and two loading berths. An additional 4 acres of land is available for dockside expansion. This acreage is located adjacent to both rail and highway corridors.

**Utility Access**

Electric, water, and sanitary sewer services are available on site from local utility suppliers.

**Adjacent Land Uses**

The Central Dock site is located just north of the City of Coos Bay proposed Front Street Historic Waterfront District. The Coos Bay deep-draft shipping channel is on the eastern side of the site. The western length of the site is bounded by Highway 101.

**Barriers To Development**

There are no inhibiting physical barriers to development on-site. The 14-acre site includes a 5-acre chip pile, a 4-acre warehouse site, and a 2.5-acre merging chip pile and warehouse area. An office structure occupies approximately two acres.

The Central Dock site is currently an underutilized industrial site. The marketability of the dock fluctuates with the natural resource business cycle. The dock has historically developed with the timber industry. According to information provided by the owner of Central Dock, John Brands, the facility has had difficulty in attracting industrial users. A more flexible zoning designation which allows water-related industrial and tourism-related commercial uses would provide wider market utilization of the site. Current zoning does not permit uses such as a waterfront motel, for example.

According to information provided by John Brands, the site's location just north of the City of Coos Bay's proposed Historic Waterfront District may inhibit future industrial uses on the Central Dock site. City officials have proposed that the Central Dock site could serve as a “transitional property” between the historic district and waterfront industrial uses.

**Current Zoning**

The Central Dock site is zoned Waterfront-Industrial by the City of Coos Bay. The CBEMP designates the site area as Urban Water-Dependent (44 UW). The site is intended to be developed for industrial and commercial uses that are water-dependent or water-related.

**Ownership**

Central Dock Company, Coos Bay.

**Summary Of Industrial/Commercial Development Potential**

The Central Dock site is well-suited for industrial use. The size and location of the site lends itself to a wide-array of industrial uses. The site is within close proximity to services and amenities provided by the City of Coos Bay, and other established industrial and commercial uses.

The site has access to transportation infrastructure, which would benefit industrial development. The property is located along Highway 101 and the Central Oregon and Pacific Railroad line. The site is a
fully established marine terminal with dock facilities, storage facilities, and cargo handling operations in place.

Existing roads and utilities are adequate to facilitate development of the site.

The site is zoned Urban Water-Dependent, which restricts industrial uses of the site to those that are water-related or water-dependent. The site is located just north of the City of Coos Bay’s proposed Historic Waterfront District. The site is under consideration to serve as a cornerstone of the waterfront district. This would require a more flexible zoning designation allowing for industrial and tourism/commercial water-related uses of the property.

**Sitka Dock**

**Location/Jurisdiction**
The Sitka Dock site is located on the east side of the lower bay, two miles inside the Coos Bay harbor entrance, adjacent to Cape Arago Highway, and south of the Coos Bay City limits. The site is within the planning jurisdiction of Coos County, located outside the Urban Growth Boundary. The site is approximately 65 acres. It is referred to as site number BAEDC-60 in Tables A-4 and A-5.

**Transportation Access**
Primary road access to the site is from Cape Arago Highway. The site has approximately 4,500-feet of frontage on Cape Arago Highway.

Marine services on the site include an existing dock which extends west by northwest approximately 1,000-feet from the shoreline, with a easterly extension approximately 400-feet long. Water depth at the dock is 24 feet MLLW. The dock is not structurally sound; however, existing regulatory and permit requirements allow the dock to be repaired or modified. Deep-draft shipping channel access is within two miles of the Coos Bay harbor entrance.

Railroad service is not available to the Sitka Dock site.

**Utility Access**
Electric, water and sewer services are available from local utility suppliers.

**Adjacent Land Uses**
The site is within CBEMP management segment 56 UW. The site is fronted by the estuary on its north, south and west sides. The east side of the site has a wooded buffer along the Cape Arago Highway. Residential areas are east of the Cape Arago Highway.

**Barriers To Development**
There are no physical impediments to development on the site. The site is generally flat. From the highway, the site slopes sharply downward to a nearly flat elevation of approximately 20 feet mean sea level. The existing dock has deteriorated and is not structurally sound. However, existing regulatory and permit requirements allow the dock to be repaired or modified. The site was formerly used for a pulp
operation and contains a significant amount of fill material. According to the site’s owner, there are no known issues pertaining to environmental contamination on the site.

**Current Zoning**
The CBEMP designates the site area as Urban Water-Dependent (56 UW). It is intended to be developed for industrial and commercial uses that are water-dependent or water-related. The site is located within the boundaries of the Bay Area Enterprise Zone.

**Ownership**
The Sitka Dock site is owned by Willis Smith.

**Summary Of Industrial/Commercial Development Potential**
The Sitka Dock site is suited for industrial development. The full range of urban services are available to the site. There are 65 acres of flat uplands, and fee title to 150 acres of tidelands.

The site has access to Cape Arago Highway. There are some concerns that access to the site is limited, however, due to traffic volumes on the highway which may inhibit truck access to the site. Currently, the entrance to the site is not signalized, and no turn lane from the highway is provided. Such improvements would need to be pursued with the Oregon Department of Transportation.

The site is zoned Urban Water-Dependent, which restricts industrial uses to those that rely or relate to Coos Bay. This zoning limits the potential industrial uses that the site can accommodate given its favorable size, location and physical characteristics.

**Charleston Shipyard Area**

**Location/Jurisdiction**
The Charleston Shipyard area is located at the entrance to Coos Bay and west of the South Slough. The site is approximately 34 acres. The Charleston Shipyard is located within the planning jurisdiction of Coos County. The site is not within a UGB. It is referred to as site number 0-3 in Tables A-4 and A-5.

**Transportation Access**
Primary access to the site is provided by the Cape Arago Highway. Local roads provide access the interior of the site. Rail service is not available to the site. Marine services to the site include a variety of docks, marinas, and services for commercial and recreational fishing fleets and boat repair facilities.

**Utility Access**
Electric, water and sanitary sewer services are provided by local utility suppliers.

**Adjacent Land Uses**
The northern section of the site fronts the lower Coos Bay. The eastern side is adjacent to the South Slough. Surrounding land uses are industrial and commercial. The Oregon Air Guard Facility is located west of the site.
**Barriers To Development**

There are no physical barriers inhibiting development of the site. The site is currently being utilized for commercial and recreational fishing fleets and boat repair and storage.

**Current Zoning**

Thirteen acres of the site are zoned Industrial and 21 acres are zoned Commercial by Coos County. The CBEMP designates the site area as Urban Water-Dependent (61 UW). The site is intended to be developed for industrial and commercial uses that are water-dependent or water-related.

**Ownership**

The Charleston Shipyard is managed by the Oregon International Port of Coos Bay.

**Summary Of Industrial/Commercial Development Potential**

The Charleston Shipyard Area property lends itself to development of small industrial operations and to commercial activities that relate or rely to Coos Bay. The full range of urban services are available to the site. The site has developed marine facilities that accommodate commercial and recreational fishing activities. Transportation access is limited to the Cape Arago Highway. Rail and shipping services are not available. The site is currently utilized for commercial and recreational fishing fleets, boat building and repair operations, and boat storage.

**Eastside Industrial Property**

**Location/Jurisdiction**

The Eastside Industrial Property is approximately 114 acres of upland property located adjacent to the Eastside neighborhood of the City of Coos Bay. The Eastside property includes a parcel owned by Sause Bros., Inc. This parcel is located adjacent to the SOMAR shipyard. The site is located within the planning jurisdiction of the City of Coos Bay. The site is referred to as O-4 in Tables A-4 and A-5.

**Transportation Access**

The Eastside Industrial property has poor transportation accessibility. The site does not have access to Highway 101 or any other arterial. Rail service is not available to the site. Although the site is along Coos Bay, developed marine services do not exist.

**Utility Access**

Electric, water, and public sanitary sewer services are currently inadequate to support industrial development.

**Adjacent Land Uses**

The property is located west and north of existing residential development. Coos Bay bounds the west side of the property.

**Barriers To Development**

The Oregon International Port of Coos Bay owns and controls the Eastside Industrial Property. The site has most recently been utilized for disposal of dredged material from Coos Bay deep-draft harbor.
channel maintenance. Approximately 114 acres are suitable for urban development. Wetlands are present on the east side of the site.

In 1995, an economic analysis commissioned by the Oregon International Port of Coos Bay concluded that the best use of the property is residential development. The Port believes that changing the property from industrial to residential use represents the best long-term use of the site.

The proposed zone change would convert approximately 100 acres of industrial and commercial land to residentially zoned land. Approximately three acres would be reserved for general commercial use.

The Sause Bros. property is currently being used as a pasture. A portion of this property was recently designated as a wetland.

Current Zoning
The site is zoned Waterfront Industrial (WI) and Industrial/Commercial (IC) by the City of Coos Bay. The CBEMP designates the site as Urban Water-Dependent (Management Segment 27 UW). The site is intended to be developed for industrial and commercial uses that are water-dependent or water-related.

Ownership
The Eastside Industrial Property is owned and managed by the Oregon International Port of Coos Bay. Sause Bros., Inc. owns a parcel adjacent to the SOMAR shipyard.

Summary Of Industrial/Commercial Development Potential
The Eastside Industrial Property is not well-suited for industrial development. The site is isolated, with poor transportation access and inadequate utility services to support industrial development. The surrounding residential land uses also make the property impractical for many industrial uses.

The Oregon International Port of Coos Bay Master Plan proposal for the property seeks to change the existing industrial zoning designation to residential. The Master Plan calls for a limited amount of general commercial land use.

ECONOMIC DEVELOPMENT OPPORTUNITIES AND CONSTRAINTS
The industrial and commercial land situation in the Bay Area offers both economic opportunities and constraints for future development in the region. According to the data collected and evaluated for this land use inventory, the amount of available industrial and commercial land is limited, especially within the city limits of Coos Bay and North Bend.

Commercial properties are primarily clustered along Highway 101 and along the Cape Arago Highway in the City of Coos Bay and North Bend. Industrial properties are primarily located along Highway 101 in North Bend and Coos Bay, near the North Bend Municipal Airport, and along the Cape Arago Highway in Coos County. A substantial amount of mostly undeveloped industrial land is on the North Spit in Coos County.
There are approximately 700 acres of available industrial land on the North Spit that can accommodate the development of large industrial operations or smaller, individualized industrial activities. These properties, however, are not fully serviced by urban infrastructure. Currently, public sanitary sewer services are not available on the North Spit; they can be extended under an existing goal exception approved by DLCD. In addition, this area is zoned for water-related or dependent industrial uses. This zoning restriction limits the industrial development potential of the North Spit properties.

Local stakeholders have expressed concern that some vacant or underutilized properties in the Bay Area are not truly available for long-term industrial development. Some property owners are reserving their land for their own future use and, therefore, are unwilling to sell the property or commit it to long-term lease. While such properties may be primarily vacant and appear, on the surface, to be available (and, by state regulations, must be included in vacant/underutilized industrial land inventories), their current market availability is limited by the owners’ intentions. One example of such a property is the Roseburg Forest Products Industrial site on the North Spit, which comprises approximately 250 acres of the approximately 700 acres of available industrial land on North Spit.

As the Bay Area continues to pursue diversification of its economic base, and as the area continues to develop as a commercial, professional, and tourism area, many of the industrial and commercial sites will be attractive to development. Many of the available sites within the city limits of Coos Bay and North Bend offer scenic bay views, marine services, and favorable physical characteristics for development. Many of these sites also offer the full-range of basic urban services.
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<tr>
<th>BAEDC Site Survey</th>
<th>BAEDC-1</th>
<th>BAEDC-2</th>
<th>BAEDC-3</th>
<th>BAEDC-5</th>
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| Avail. for short-term lease only | | | | | | | | | *
| Tribal Trust | | | | | | | | | |

Refer to Key for site locations.

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April 30, 1998
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Refer to Key for site locations.

Table A-4, Page 3

April 30, 1998
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Refer to Key for site locations.

Table A-4, Page 4

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Refer to Key for site locations.  

Table A-4, Page 5  

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<td>partially developed</td>
<td>primarily vacant</td>
<td>primarily vacant</td>
<td>small bldgs.; site mostly vacant</td>
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<td>Uses = WD or WR; site not consolidated</td>
<td>Proposed rezone to 100 ac. resid. &amp; 3 ac. Gen. Committ; limited access; former dredge disposal site</td>
<td>Uses = water-dependent or-related</td>
<td>Uses = water-dependent or-related</td>
<td>Limited availability; 226 ac. w/ Dunes Rec. Area</td>
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Refer to Key for site locations.  
Table A-4, Page 6  
April 30, 1998
### TABLE A-4. INVENTORY OF AVAILABLE INDUSTRIAL AND COMMERCIAL SITES IN BAY AREA

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<tr>
<td>IMPROVEMENTS</td>
<td>IMPROVEMENTS</td>
<td>vacant structure and parking area</td>
<td>vacant structure and parking area</td>
<td>vacant</td>
<td>vacant</td>
<td>vacant</td>
<td>log sort/storage yard; 440v 3-phase power</td>
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</tr>
<tr>
<td>ADDITIONAL COMMENTS</td>
<td>ADDITIONAL COMMENTS</td>
<td>Site devel. will require easements; has consolidation potential</td>
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</tbody>
</table>

Refer to Key for site locations.  
Table A-4, Page 7  
April 30, 1998
TABLE A-4. INVENTORY OF AVAILABLE INDUSTRIAL AND COMMERCIAL SITES IN BAY AREA

Total Estimated Acreage* of Identified Available Sites:

<table>
<thead>
<tr>
<th>Commercial</th>
<th>Industrial</th>
<th>Industrial-Commercial (City of Coos Bay)</th>
<th>Airport</th>
<th>Water-Dependent/ Water-Related**</th>
<th>Total Acreage</th>
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<tr>
<td>31.58</td>
<td>218</td>
<td>27.54</td>
<td>58</td>
<td>1132.97</td>
<td>1468.09</td>
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</table>

* These acreages are estimated from the Table 4 inventory, which is not an exhaustive inventory of vacant and under-utilized commercial and industrial land in the Bay Area. All wetland acreage (indicated in Table 4) has been excluded from the total acreage. If parcels have a zoning designation in addition to CBEMP management segment designation, the acreage is included under Water-Dependent/Water-Related.

** The total acreage included in CBEMP management segments is likely to be lower than the figure reported herein, as management segments may cover only portions of some parcels listed in Table 4.

Total Estimated Acreage of Sites Available for Development In the Short Term*

<table>
<thead>
<tr>
<th>Commercial</th>
<th>Industrial</th>
<th>Industrial-Commercial (City of Coos Bay)</th>
<th>Airport</th>
<th>Water-Dependent/ Water-Related</th>
<th>Total Acreage</th>
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<tr>
<td>30.92</td>
<td>35</td>
<td>26.85</td>
<td>58</td>
<td>245.67</td>
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* Sites were considered to be unavailable for development in the short term if they are not serviceable, if there is inadequate site access, or if they have certain environmental constraints (e.g., steep slopes). Sites within the flood plain were NOT excluded from short-term availability. All wetland acreage (identified in Table 4) has been excluded from the total acreage.

Refer to Key for site locations.

Table A-4, Page 8

April 30, 1998
<table>
<thead>
<tr>
<th>Site Number</th>
<th>Area (acres)</th>
<th>Wetlands (acres)</th>
<th>Commercial</th>
<th>Industrial</th>
<th>Ind'l-Comm'l</th>
<th>Airport</th>
<th>WD/WR</th>
<th>Commercial</th>
<th>Industrial</th>
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Refer to Key for site names and locations.

Table A-5, Page 1

April 30, 1999
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<tr>
<th>Site Number</th>
<th>Area (acres)</th>
<th>Wetlands (acres)</th>
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Total Acreage Available:
- Long-Term 1468.09
- Short-Term 396.44

* Site O-7: 226 acres (within Dunes Rec. Area) plus 40 acres of wetlands considered unavailable for long- or short-term development.

** Site O-12: 5 acres (shown in table as wetlands) actually steep slopes and considered unavailable for long- or short-term development.

Refer to Key for site names and locations.

Table A-5, Page 2

April 30, 1998
# Key to Industrial/Commercial Sites

<table>
<thead>
<tr>
<th>Reference No.</th>
<th>Site Name</th>
<th>Location</th>
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<td>BAEDC Site Survey:</td>
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<td>N. Bay Marine Industrial Park</td>
<td>North Spit, Coos Co</td>
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<tr>
<td>BAEDC-2</td>
<td>N. Bay Industrial Development Site</td>
<td>North Spit, Coos Co</td>
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<td>BAEDC-3</td>
<td>N. Point Industrial Park</td>
<td>North Bend</td>
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<tr>
<td>BAEDC-5</td>
<td>Roseburg Forest Products</td>
<td>North Spit, Coos Co</td>
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<td>BAEDC-11</td>
<td>Powell Property</td>
<td>187 Golden, Coos Bay</td>
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<td>BAEDC-12</td>
<td>Powell Property</td>
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<td>BAEDC-13</td>
<td>HGE, Inc</td>
<td>SE corner of Ocean Blvd. &amp; Radar Rd.</td>
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<td>BAEDC-14</td>
<td>K&amp;J Reeves</td>
<td>1297 Ocean Blvd., Coos Bay</td>
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<td>BAEDC-15</td>
<td>Wave Young</td>
<td>N. side Ocean Blvd, SE of Verger's car lot</td>
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<td>BAEDC-16</td>
<td>Thomas Humphrey</td>
<td>So. side of Ocean Blvd., Coos Bay</td>
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<td>BAEDC-18</td>
<td>Dorothy Colton</td>
<td>S. side Ocean Blvd., E. Lindy Lane, Coos Bay</td>
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<td>BAEDC-21</td>
<td>W&amp;D Wright</td>
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<td>BAEDC-22</td>
<td>Gazelle Investments</td>
<td>S. of Kruse, Bet. 4th &amp; 5th, Coos Bay</td>
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<td>BAEDC-24</td>
<td>Hanover Bay, Inc.</td>
<td>S. side Ocean Blvd., west of K-Mart, Coos Bay</td>
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<td>BAEDC-26</td>
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<td>W. of Coos RVR Hwy, on Isthmus Sligh, Coos Bay</td>
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<td>N. of Hst., Bet. 9th Ave. &amp; Coos Rvr Hwy., Coos Bay</td>
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<td>BAEDC-41</td>
<td>George &amp; Ernie Millen</td>
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<td>Croca-Gator Properties</td>
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<td>Corner of Mill &amp; Holland, Coos Bay</td>
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North Bend Industrial Site Survey:

| N. Bend Site 4-4 | East side of Pony Slough, North Bend |
| N. Bend Site 4-5 | East side of Pony Slough, North Bend |
| N. Bend Site 4-7 | North Bend Downtown Waterfront Area |
| N. Bend Site 4-8 | North Bend Downtown Waterfront Area |
| N. Bend Site 4-10 | North Bend Downtown Waterfront Area |
| N. Bend Site 4-11 | North Bend Downtown Waterfront Area |
| N. Bend Site 4-15 | North Bend Downtown Waterfront Area |

*Key, page 1*
# Key to Industrial/Commercial Sites

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<td>Front St., Coos Bay</td>
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<td>Charleston Shipyard</td>
<td>Charleston area, Coos County</td>
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<td>Eastside Industrial</td>
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<td>Chevron Property</td>
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<td>Cape Arago Mill Site</td>
<td>Empire area of Coos Bay</td>
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<td>Riley/McKeown Site</td>
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<td>Coos Bay Village Shops/LaFranchi Site</td>
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<td>Skating Rink Site</td>
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<td>Former Safeway Store</td>
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<td>Coos Bay/North Bend Water Board Site</td>
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<td>Bettencourt Site</td>
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<td>State of Oregon Site</td>
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<td>Crescent City Marine (SOMARS)</td>
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APPENDIX B

EXAMPLE ORDINANCES
EXAMPLE ORDINANCE: FLOATING ZONE

CHAPTER 2.19 WATERFRONT/MARINE DISTRICT (W/M)

Section 1. INTENT

The W/M District is intended to allow a mix of water-dependent, water-related and water-oriented uses along the Coos Bay waterfront. The W/M district will continue to be the community's center for water-dependent, water-related, and water-oriented activities, but will allow up to 50% of the area to be used for non-water-dependent and non-water-related uses, in recognition that the economy of the area is in transition, and flexibility is needed in order to:

a) attract new industries
b) protect both estuarine resources and the investment in port facilities, and
c) ensure public access to the waterfront

Section 2. PERMITTED USES

The following uses are consistent with the Coos Bay Estuary Management Plan (CBEMP) and are permitted in the W/M zoning district:

1. All uses permitted in the W-I district.

2. Residential Use Types:
   - Dwelling for caretaker or watchman
   - Housing directly required by use
   - Housing accessory to principal uses permitted in this section

3. Commercial Use Types:
   - Scrap operations: Heavy
   - Wholesale, storage, and distribution: Heavy
   - Sales of water-dependent or water-related goods and services
   - Commercial uses accessory to the principal uses permitted in this section

4. Industrial Use Types:
   - Marinas and related recreational facilities
   - Marine terminal facilities
   - Manufacturing of water-dependent or water-related goods
   - Manufacturing that requires access to water transportation
Section 3: CONDITIONAL USES

The following uses may be permitted in the W/M district if they conform to the provisions of Chapter 5.13:

1. Residential Use Types:
   Tourist housing

2. Commercial Use Types:
   Retail sales, restaurants, and services related to the tourism industry

3. Industrial Use Types:
   Substations
   Waste transfer station

4. Civic Use Types:
   Museums related to the Coos Bay estuary, its natural systems, harbor development and related maritime history.

Section 4. USES EXPRESSLY PROHIBITED

The following uses are specifically prohibited in the W/M district:

1. Residential Use Types, except as specifically mentioned.

2. Commercial Use Types, except as specifically mentioned.

3. Civic Use Types
   Government offices
   Schools
   Libraries
   Post Offices

4. Agricultural Use Types, except as specifically mentioned.
EXAMPLE ORDINANCE: FLOATING ZONE

Section 5. PROPERTY DEVELOPMENT STANDARDS

The standards of Article 3, General Development Standards and Regulations, shall apply to all land and structures in the W/M district, except as specifically regulated in this section or the Coos Bay Estuary Management Plan.

1. Site Plan and Architectural Review. Except for those uses that are clearly water-dependent or water-related, a Site Plan and Architectural Review and approval shall be required for the establishment, intensification, or major remodeling of any use in the W/M district.

2. Lot Standards: No requirements.


4. Building Height: No restrictions, other than those imposed by the Building Code.

5. Fences and Walls: No requirements, except as may be necessary for protection of the health, safety, and general welfare of the public.

6. Yards: No requirements.

7. Landscaping and Screening:
   
   A. All heating and air conditioning equipment shall be appropriately screened from public view. This does not apply to roof-mounted equipment.
   
   B. All storage and trash areas must be enclosed and screened from public view.
   
   C. Outdoor storage areas must be enclosed and screened from the view of adjacent residential and commercial districts.

8. Noise: The noise level shall not exceed permitted levels measured at the appropriate measuring points established by the Oregon Department of Environmental Quality. If there is doubt that the proposed use will violate these standards or if a valid complaint has been registered about the level of noise, the owner or agent may be required to show written compliance with state regulations.

9. By-products: There shall be no emissions, odor, gas, mist, vapor, pollen, soot, carbon, acid, smoke, fumes, dust, particulate matter, or other air, water, of land pollution which exceeds permitted levels of local, state, or federal regulations. If there is doubt that the proposed use will violate these standards or if a valid complaint has been registered about possible pollution, the owner or agent may be required to show written compliance with state regulations.

10. Utilities. When practical, utilities such as power lines, telephone lines, and television cables shall be installed in underground conduits and approved by the Public Works Department.

April 30, 1998

Bay Area Comprehensive Economic Analysis
EXAMPLE ORDINANCE: ACCESSORY USES AND STRUCTURES

Section 3.23 ACCESSORY USES AND STRUCTURES

Accessory uses and structures are uses which support and are subordinate to the principal permitted use of a site or sites. Accessory buildings and structures shall serve, primarily, those persons regularly and customarily involved with the use and include buildings and structures customarily incidental to a permitted use located on the same lot.

Section 1. USE TYPES

A. Garages for storage and maintenance of motor vehicles used by the principal use.

B. Storage of motor fuels and lubricating oils for vehicles used by the principal use.

C. Maintenance and utility shops for equipment used by the principal use.

D. Central heating, air conditioning and refrigeration plants.

E. Buildings for storage of documents, records, testing and research equipment, experimental models, and other personal property related to the principal use.

F. Clinics, cafeterias, lounges, educational and recreational facilities for employees and their families.

G. Day care facilities, primarily for employees.

H. Electrical substations.

I. Administrative offices.

J. Water storage, drainage, and treatment facilities.

K. Fire protection facilities.

L. Rental and development information offices.

M. Office and commercial uses related, accessory to or serving the industrial use(s) as a part of a planned industrial development that includes water-dependent, water-related or water-oriented uses.
N. Other office and administrative uses not related to the permitted use, where no more than 10\% (ten percent) of the floor area of the use is used for the unrelated activity.

O. Retail outlets for warehousing or manufacturing operations, limited to 10\% (ten percent) of total floor area. The retail use shall be physically separated, by wall or other barrier, from the warehousing or manufacturing operations. Warehousing and storage areas shall not be used as showrooms.

Section 2. DEVELOPMENT REQUIREMENTS

1. Development Standards. All accessory uses shall comply with the development requirements of the underlying zone.

2. Site Plan and Architectural Review. Site Plan and Architectural Review and approval shall be required for any accessory use or structure that will occupy more than 10\% of the site.
APPENDIX C

LIST OF ACRONYMS
LIST OF ACRONYMS

Following is a list of acronyms used in the Bay Area Comprehensive Economic Analysis.

<table>
<thead>
<tr>
<th>Acronym</th>
<th>Definition</th>
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<td>ACOE</td>
<td>US Army Corps of Engineers</td>
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<td>AFDC</td>
<td>Aid to Families with Dependent Children</td>
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<tr>
<td>BAEDC</td>
<td>Bay Area Economic Development Council</td>
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<tr>
<td>BATS</td>
<td>Bay Area Transportation Study</td>
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<td>CBEMP</td>
<td>Coos Bay Estuary Management Plan</td>
</tr>
<tr>
<td>CCD</td>
<td>Coos Curry Douglas</td>
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<td>DEA</td>
<td>David Evans and Associates, Inc.</td>
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<td>DLCD</td>
<td>Department of Land Conservation and Development</td>
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<tr>
<td>d.u.</td>
<td>dwelling units</td>
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<tr>
<td>ESWD</td>
<td>Especially Suited for Water-Dependent (use)</td>
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<tr>
<td>FAA</td>
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<tr>
<td>FIRE</td>
<td>finance, insurance, and real estate</td>
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<td>ITE</td>
<td>Institute of Transportation Engineers</td>
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<tr>
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<td>kilovolt</td>
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<td>LCDC</td>
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<tr>
<td>MLLW</td>
<td>mean lower low water</td>
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<td>MSL</td>
<td>mean sea level</td>
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<td>NRA</td>
<td>National Recreation Area</td>
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<tr>
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<td>Oregon Administrative Rules</td>
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<td>OEA</td>
<td>(State of Oregon) Office of Economic Analysis</td>
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<td>Oregon Economic Development Department</td>
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<td>TEU</td>
<td>20-foot equivalent units</td>
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<td>urban growth boundary</td>
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<td>USDA</td>
<td>US Department of Agriculture</td>
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<td>WR</td>
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