



JOHNSON REID  
LAND USE ECONOMICS

## ECONOMIC OPPORTUNITIES ANALYSIS



Prepared For:  
WALLOWA COUNTY, OREGON

July 25, 2009



## TABLE OF CONTENTS

---

<b>STATEMENT OF PURPOSE</b>	<b>1</b>
Introduction	1
Urban Land Need Analysis	1
<b>TREND ANALYSIS</b>	<b>3</b>
Introduction	3
National Economic Trends	3
Statewide Economic Trends	8
Regional & Local Trends	11
<b>COMPETITIVE POSITION &amp; TARGET INDUSTRY OPPORTUNITIES</b>	<b>18</b>
<b>TWENTY-YEAR EMPLOYMENT FORECAST</b>	<b>24</b>
Introduction	24
Creating a Base Year Estimate	24
Future Employment Growth	25
<b>TWENTY-YEAR EMPLOYMENT LAND NEEDS ANALYSIS</b>	<b>30</b>
Introduction	30
Summary of Commercial and Industrial Land Need Findings	30
Industrial, Office, and Specialized Use Land Need Methodology	32
Retail Commercial Land Methodology	33
<b>EXISTING LAND SUPPLY AND SUITABILITY ANALYSIS</b>	<b>36</b>
Summary of Commercial and Industrial Land Supply	36
Enterprise Commercial and Industrial Land Supply	37
Joseph Commercial and Industrial Land Supply	42
Wallowa Commercial and Industrial Land Supply	47
Lostine Commercial and Industrial Land Supply	51
<b>20-YEAR SUPPLY/DEMAND RECONCILIATION</b>	<b>54</b>
Reconciliation of Land Demand & Supply	54
<b>GOALS AND POLICIES</b>	<b>57</b>
City of Enterprise	57
City of Joseph	59
City of Wallowa	60
City of Lostine	61
<b>TECHNICAL APPENDIX A: DETAILED LAND NEED TABLES</b>	<b>62</b>

---



# STATEMENT OF PURPOSE

---

## INTRODUCTION

The jurisdictions in Wallowa County, along with many other jurisdictions throughout Oregon, are currently undertaking the State-mandated process of analyzing and planning 20-Year urban land need.

The objective of this effort will be to complete an Economic Opportunities Analysis for Wallowa County as a whole, and specifically for the cities of Wallowa, Lostine, Enterprise, and Joseph. The main goal of the project is to ensure that each city has a basis for planning appropriate infrastructure development, to create a guide for each community to establish amendments to their Comprehensive Plans/Development Code and to determine strategic investments in suitable sites.

To this end, Wallowa County has retained Johnson Reid to provide research and analysis of potential urban growth scenarios with which the cities may consider urban land needs over the twenty-year planning period. Several economic and planning issues indicated need for independent land need analysis over the planning horizon. These include:

- The adequacy of existing, available lands suitable for targeted industry uses within the current Urban Growth Boundaries;
- The nature of commercial land need driven by new industry and population growth affected by primary industry and workforce growth over the planning horizons, particularly with respect to geographic orientation; and
- Characterization of growth potential in the context of the physical and infrastructure qualities of lands within and proximate to Wallowa County's urban areas.

## URBAN LAND NEED ANALYSIS

To document the potential nature of urban lands required by the identified jurisdictions over a twenty-year period, JOHNSON REID formally utilized a methodology for long-range land need substantiation consistent with State of Oregon land use planning requirements. Specifically, employment land demand consistent with State Planning Goal 9 Economic Opportunities Analysis ("EOA") methodology and documentation requirements was used in this analysis.

### Goal 9 – Wallowa County Employment Land

The State Planning Goal 9 EOA methodology guidelines call for a six-step approach to economic development planning and resulting quantification of employment (industrial, retail, office, institutional, etc.) land need for urban growth boundary planning purposes. These six steps largely guide this resulting analysis of Wallowa County's need for urbanized land. The required Goal 9 analytical steps that roughly comprise the outline of this document are:

1. *Economic Planning Area Definition:* A determination of the geography of interest for 20-year economic development potential.
2. *Economic Trends Analysis:* Identification of global, national, state, regional and local economic trends that have shaped recent economic performance as well as likely 20-year economic activity that will determine employment land need over the duration of the study period.
3. *Public/Stakeholder Input Process:* JOHNSON REID will work closely with a formal Technical Advisory Committee (T.A.C.) to guide and inform the process at key stages. The group will include public officials at both the City and County, key economic stakeholders, regional economic development professional, developers, and representatives from transportation & facilities.



4. *Industry & Job Growth Forecasts:* Detailed forecasts of job growth by industry within Wallowa County over the planning period that will in turn drive demand, if any, for different employment land categories.
5. *Land Need Forecasts:* Job growth forecasts translated into land demand forecasts based on industry and space type usage and floor area ratio (FAR) patterns anticipated into the future.
6. *Land/Parcel Need Quality:* A detailed treatment of employment land need in terms of specific parcel types, sizes, quantities and other qualities appropriate to economic growth anticipated by the jurisdiction.



## TREND ANALYSIS

---

### INTRODUCTION

The Trend Analysis section provides the foundation of economic information that will shape realizable economic opportunity potential for a jurisdiction, resulting potential job growth scenarios, and ultimately employment land need over the determined planning horizon.

In conducting the Trend Analysis, it is underscored that given the current economic climate, during the course of analysis, economic circumstances at the global, national, state and local levels significantly change in response to economic and political events and objectives. Through May of 2009 some of the key factors affecting the economic environment include:

- New Presidential administration and significant changes in federal economic policies, including in response to economic distress of recent months;
- Numerous federal bail-out proposals and agreements for numerous financial institutions and U.S. automakers;
- Continued credit crisis in the financial markets due to the uncertain future of “toxic” financial assets that include billions of dollars in “sub-prime” mortgages;
- A return of the Dow Jones Industrial Average to pre-1998 levels; and
- A first quarter 2009 drop in U.S. GDP of 6.2%, the worst since the severe 1980-82 U.S. recession.

Alternatively, the Federal government passed an unprecedented \$850 billion stimulus bill meant to help create jobs with targeted infrastructure investments, state and local government budget stop-gaps, and various tax credits and investment incentives for housing, alternative energy, and numerous other targeted industries and economic activities nationwide.

Ultimately, current economic times make it virtually impossible to produce a highly timely national trend analysis. JOHNSON REID, therefore, has continued to utilize the economic forecast “of record” by the federal government, the non-partisan Congressional Budget Office biannual economic forecast. As that official forecast makes clear, economic times are uncertain, but Trend Analysis consistency with its findings – even those that have changed in only a few months – is preferable to constantly shifting speculation.

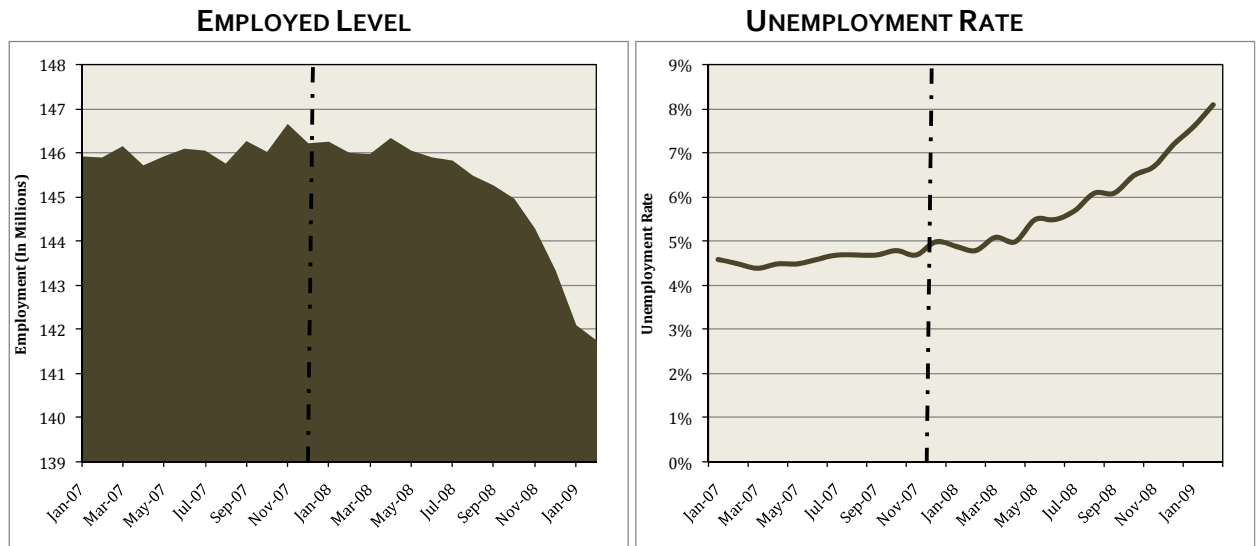
### NATIONAL ECONOMIC TRENDS

#### SHORT-TERM OUTLOOK

In December of 2008, the National Bureau of Economic Research (NBER), an organization charged with officially dating economic cycles, announced that the country has been in a contractionary period (recession) since December of 2007, ending a 73 month expansionary period dating to November of 2001. Since December of 2007, the national economy has shed over 4.4 million jobs with unemployment rising to 8.1%, its highest level since the recession of 1981-1982.



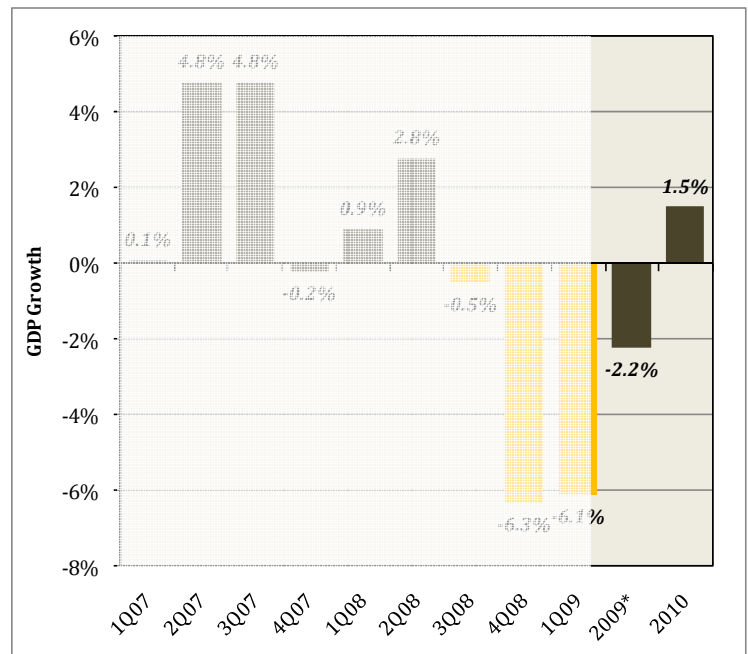
FIGURE 1:



The current recession was catalyzed by an ill-timed mixed of economic conditions that concurrently curtailed economic growth. Principally, a drop in housing prices and subsequently housing starts severely undermined the solvency of the nation's financial institutions, disrupting financial markets and exasperating a tense period of uncertainty. In addition, a historic

FIGURE 2: REAL GROSS DOMESTIC PRODUCT

rise in the price oil and other commodity inputs markedly limited economic activity. For a time, contractionary pressure was partially off-set by strong export growth driven by emerging markets and a favorable currency position. Aggressive monetary and fiscal policy also played a role, with the federal reserve slashing interest rates and the Bush Administration's \$100 billion tax rebate package in the first half of 2008. However, output growth began to weaken by mid-2008, with GPD posting negative growth (-0.5%) in the third quarter of 2008. The economic condition deteriorated further in the fourth quarter as the financial crisis intensified, uncertainty permeated through the economy and economic activity stagnated. GDP growth in the first quarter of 2009 contracted by more than 6% (6.1%) for the second consecutive period, the largest such decline since 1982.



Historically, sharp economic contractions are abruptly followed by a rapid return to growth. However, the near-term outlook is likely to be more abridged as economic conditions in place may not facilitate a "typical" recovery, specifically:



1. *The pace of recovery will be restrained by the on-going uncertainty and functionality of financial markets and institution's ability to recovery from default losses. This will continue to limit the availability of credit and increase the cost of capital investment for several years;*
2. *Housing vacancy currently sits at 2.9%, its highest level on record, while housing starts are also at record lows. Excess supply of housing units is expected to postpone the typical rebound in construction;*
3. *High unemployment and declining household wealth are expected to personal consumption spending in the near-term; and*
4. *For a time, it was theorized that economies in emerging markets would be less impacted by recessionary pressure, and would help moderate contraction domestically through strong exports. However, foreign economies are now weakening as well.*

Over the near-term, real gross domestic product is expected to fall by 2.2% in 2009, followed by a soft recovery in 2010 (+1.5% growth). While GDP is expected to recover by mid-2009, the employment situation characteristically lags recovery in output. Unemployment is likely to increase to 8.3%-8.5% in 2009 before peaking near 9.2%-9.5% in early 2010.

### **Housing Market Outlook**

As mentioned above, the inventory of unsold housing units remains historically high, and the correction in the U.S. housing market is expected to continue through the end of 2009. Housing vacancy

sits at its highest level on record, and housing starts are near record lows. Housing starts are not expected to recover until 2010, stabilizing near 2000 levels by 2015.

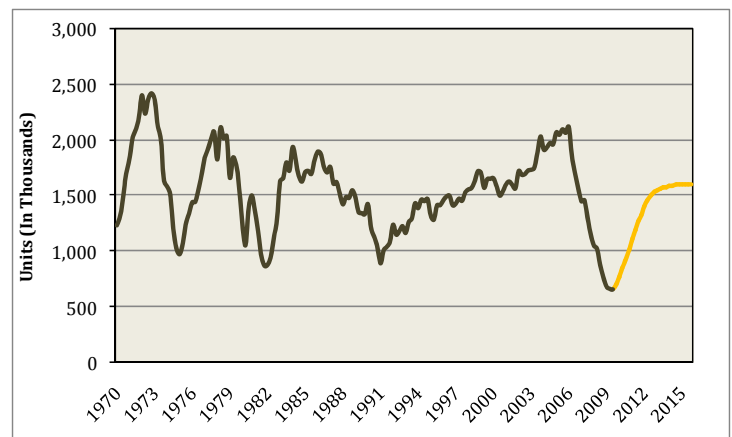
The next twelve months are expected to bring further declines in national housing prices. Home values are expected to trim an additional 14% nationally through 2009. Falling home values may continue to intensify losses to institutions holding mortgage backed securities.

The effectiveness of the Federal Government's efforts to stabilize the housing market remains to be seen. Taken together, President Obama's Homeowner Affordability and Stability Plan, coupled with the 2009 American Recovery and Reinvestment Act will extend the Home-Buyer Tax Credit to \$8,000, removing the repayment criteria, and provide upwards of \$75 billion for the modification and refinancing of trouble mortgages owned by Fannie Mae and Freddie Mac. While these efforts are likely to put downward pressure on escalating foreclosure rates, foreclosures are expected to remain well above trend in the near term.

### **Financial Market Outlook**

Signs of the impending financial crisis emerged in summer 2007, coincident with the peak and subsequent turn in the national housing market. The crisis intensified over the following twelve months, as housing

**FIGURE 3: HOUSING STARTS**

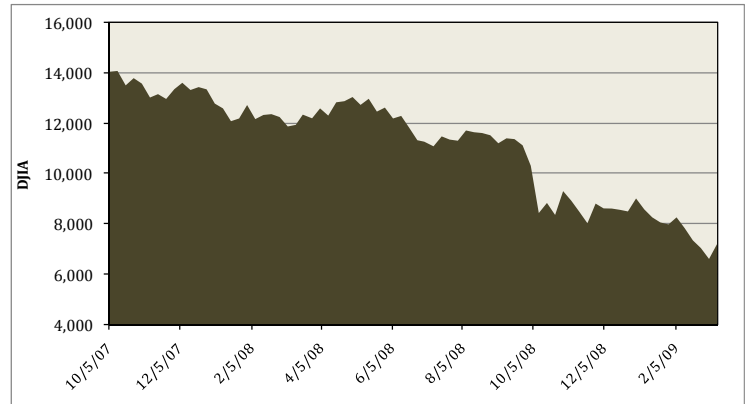






prices and a sputtering economy created significant losses of major financial institutions caused a near collapse of the nation's financial system. In September 2008, the interbank market for short-term loans seized significantly, compounding liquidity problems among wavering banks. The spread between the Federal Funds Rate and the 3-month LIBOR skyrocketed to over 3.6%, reflecting the outstanding risk and uncertainty of the period. In response to the financial crisis, the federal reserve has pumped liquidity into the market, both through aggressive interest rate cuts and through quantitative easing, effectively extending its loan facilities by accepting as collateral assets that have been shunned by the open lending market. The Department of Treasury has also begun its effort to stabilize the U.S. financial system through its highly publicized Troubled Asset Relief Program (TARP). In fall of 2008 congress authorized \$700 billion across various facilities with the aim of re-establishing the flow of credit. The reception to Federal Government's aggressive intervention has been mixed. Faith in some credit markets has improved, as exemplified by the LIBOR-Federal Funds spread falling to near 1%, still well above historical norms, but certainly an improvement over recent periods.

**FIGURE 4: DOW JONES INDUSTRIAL AVERAGE**



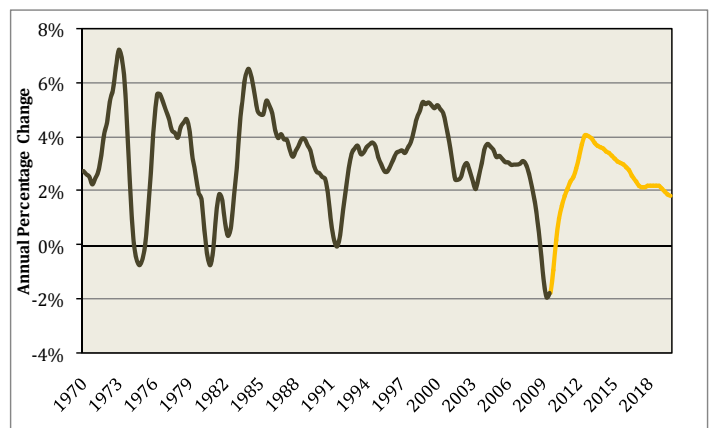
Alternatively however, the stock market has yet to exhibit similar trend, and has in fact extended losses in the current year. The Dow Jones Industrial Average has fallen roughly 47% off peak with the S&P 500 off 49%. The impact of stock market devaluation as it relates to economic recovery is the impact on household wealth. The decline of equity wealth--over \$6 Trillion thus far--is an key factor affecting household spending on the horizon.

### Personal Consumption Outlook

As typical with most contractionary periods, personal consumption spending lagged in the second half of 2008 and into 2009. More specifically, three principal factors have contributed to spending corrosion; declining employment, significant deterioration of wealth, and tight consumer credit conditions. These effects are expected to continue to constrain spending over the short-term. These conditions however, have been partially offset by falling prices of petroleum imports, which have the effective impact of a consumer tax cut.

Evaluated individually, the aforementioned variables are expected to have the following impact on Personal Consumption Spending in the near-term:

**FIGURE 5: PERSONAL CONSUMPTION SPENDING**



**Employment:** The employed level is projected to fall by 2% during 2009, with hours worked falling by 3%. While falling energy prices will partially off-set the impact, disposable income is expect to grow at a lackluster 0.5% annual pace in the near-term.

**Wealth Deterioration:** The combination of falling housing and asset prices have reduced the net worth of U.S. households by over 25%, which in-turn places downward pressure on personal





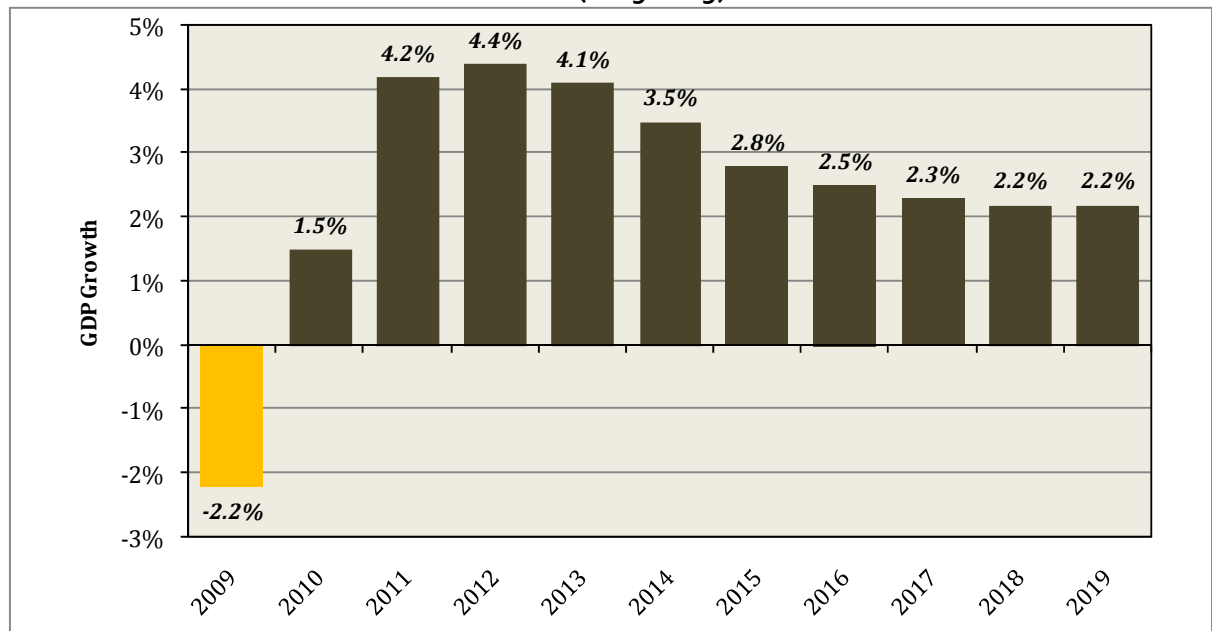
consumption. The Congressional Budget Office estimates the wealth effect will constrict personal consumption spending growth by roughly 1% in the near-term.

**Credit Availability:** According to the Federal Reserve's survey of senior loan officers, Banks' willingness to make consumer loans has dropped to its lowest level since 1980. The combination of limited borrowing opportunities and diminished collateral will continue to limit consumer credit availability, shaving roughly 1.5% off consumption growth in the near term.

#### LONG-TERM OUTLOOK

Beyond the near-term, the United States economy is expected to return to a typical growth cycle, averaging 2.7% annual GDP growth from 2011 to 2019—slightly faster than potential GDP, narrowing the GDP gap by 2015. In other words, the widened gap between real GDP and its potential level created as a result of slow growth in 2008 and 2009 will be narrowed by accelerated growth from 2011 to 2014. Beyond 2014 real output is expected to grow at the same pace, on average, as potential GDP through 2019—keeping the output gap proximate to zero.

**FIGURE 6: FORECASTED U.S. REAL GDP GROWTH (2009-2019)**



SOURCE: Congressional Budget Office (CBO)

Nationally, employment is expected to grow at an average annual rate of 0.7% from 2011 to 2019, indicating further increase in worker productivity on the horizon. Over the long-term, the inflation rate will largely be determined by monetary policy decisions, assuming that the Federal Reserve can, on average, maintain core inflation (as measured by the PCE price index) around 2.2% through 2019. Consumer inflation, as measured by the CPI-U is expected to average 2.2% annually over the same interval.

In the coming growth cycle, the United States' commitment to renewable energy transition is expected to play a major role—a reality that is likely to garner greater political support following the outcome of the 2008 election cycle. Specifically, the passage of the 2009 American Recovery and Reinvestment Act will provide billions in federal dollars for the advancement of this sector. In addition to environmental concerns, growth in domestic energy production, through both renewable and non-renewable sources, is being increasingly discussed through the prism of energy independence and energy security—the foundation of which is



sufficient, reliable, and affordable energy. The economic advantages of this transition encompass the macroeconomic benefits of investment in new technologies, greater economic productivity, and improvements in the U.S. balance of trade. At a microeconomic level, benefits include lower business costs and reduced household energy expenditures. Taken together, these advantages are manifested in job growth, income growth, and ancillary benefits to the environment.

Over the next ten years, green industries are expected to create over 2.5 million new jobs in the United States across a range of manufacturing and service industries. Over a longer 30-year horizon, forecasted job growth is expected to reach 4.2 million new jobs in the U.S. economy.

**FIGURE 7: NEW GREEN JOBS, (2008-2038)**

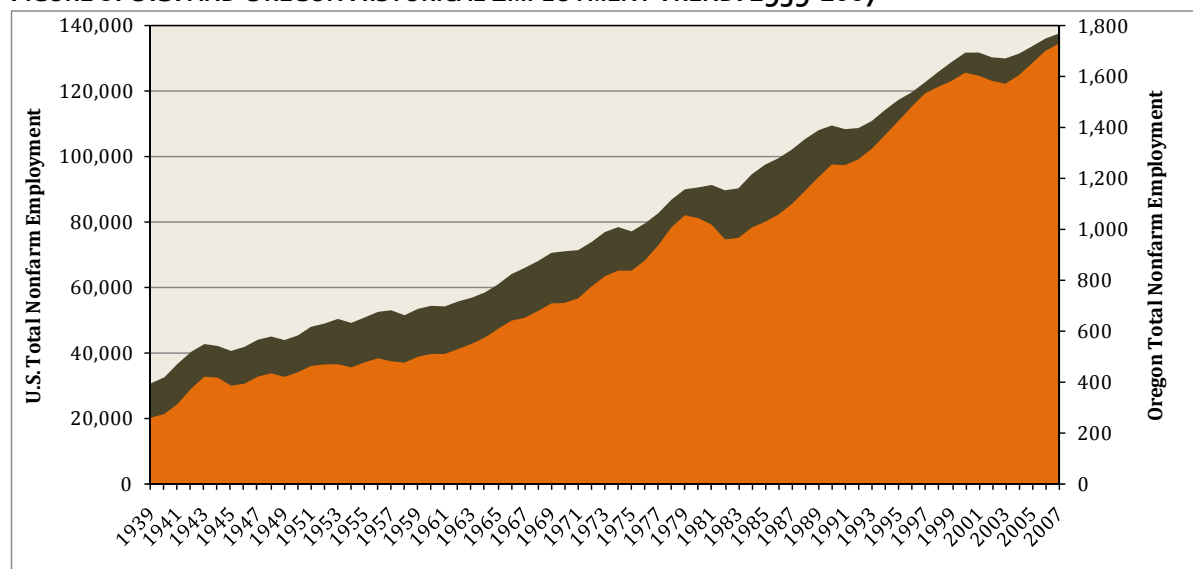
	2018	2028	2038
Renewable Power generation	407,200	802,000	1,236,800
Residential & Commercial Retrofitting	81,000	81,000	81,000
Renewable Transportation Fuels	1,205,700	1,437,700	1,492,000
Engineering, Legal, Research, & Consulting	846,900	1,160,300	1,404,900
<b>TOTAL</b>	<b>2,540,800</b>	<b>3,481,000</b>	<b>4,214,700</b>

SOURCE: Global Insight

## STATEWIDE ECONOMIC TRENDS

Oregon experienced exceptional employment growth between mid-2003 and 2007. Growth began slowing towards the end of 2006 and continued through 2007. The Oregon Employment Department's employment decline estimates for second quarter 2008 indicate that Oregon is following the U.S. economy into a slowdown. FIGURE 8 demonstrates how closely tied the Oregon economy is to economic trends at the national level. Since 1939, Oregon has tracked the peaks and valleys of the U.S. economy. Also illustrated is improved diversity in Oregon's economy as evidenced by alleviation of the volatility that plagued Oregon during the 1980's recession.

**FIGURE 8: U.S. AND OREGON HISTORICAL EMPLOYMENT TREND: 1939-2007**



Source: U.S. Department of Labor

The sectors contributing to job decline in Oregon are roughly parallel to sectors dragging down the U.S. economy, namely Construction, Manufacturing, Retail Trade, Information, Financial Activities and Leisure &



Hospitality. Considering the turmoil and uncertainty in the financial markets at the National level, it is not surprising that employment across all sectors is forecasted to decline through the end of 2009. The Oregon Office of Economic Analysis (OEA) expects a second quarter decline of 0.7% and a third quarter decline of 0.9% with the first quarter of 2009 showing growth of 0.4% as the economy begins to recover.<sup>1</sup> However, as the U.S. economy has experienced further deterioration since OEA released their forecasts in September 2008, these forecasts may be overly optimistic.

The computer and electronics equipment sector declined by 7.3%, or 750 jobs, during second quarter. OEA's 2008 annual forecast for the sector is slightly less dismal at a 4.7% employment decline with a 1.1% decline in 2009. The sector is expected to rebound with jobs gains by 2010. Private education and health services, on the other hand, gained jobs at a rate of 3.9% during second quarter and is expected to experience 4.3% growth for the year.

The Portland Metro area's job growth has been slowing since 2007 and recent estimates for the second half of 2008 show job growth below 0.5%. The current weakness is largely due to the housing slowdown and its impact on construction which has rippled through to finance and other closely related sectors, such as wood products. In addition, high-tech manufacturers have been shedding workers with Washington County leading the decline—the County has lost 5% of its high-tech employment since mid-2007.

Oregon's economic growth since 2005 is due in large part to explosive growth in exports. For example, between first quarter 2007 and first quarter 2008, Oregon exports increased by 23.7%, more than six points higher than the U.S. growth during the same period. Oregon's export growth is primarily due to export growth in agricultural products which grew by 82.2% and computer and electronics products which grew by 24.8%. Computer and electronics account for nearly 40% of total Oregon exports. Several other industries experienced high growth in exports during the same period: Waste and Scrap (+71.6%), Nonmetallic Mineral Products (+54.0%), Chemicals (+47.6%), Primary Metal Manufacturing (+31.0%), Miscellaneous Manufactured Commodities (+26.0%) and Wood Products (+23.8%).

### General Industry Outlook

Moving beyond 2010, the assumed year by which the economy pulls out of the current slowdown, Oregon's economic growth is expected to outpace growth at the National level. By 2016, the State's employment is expected to grow by 14%. Oregon's high growth prospects are due to a number of factors:

- ◇ Population growth, primarily due to net in-migration
- ◇ Relative location near Canada and Asian countries
- ◇ High commodity prices
- ◇ Export growth
- ◇ Affordable housing
- ◇ Quality of life
- ◇ Some of the lowest business costs in the nation

In addition to the factors listed above are several State initiatives which may continue to change Oregon's economic landscape and drive growth in key sectors. The Oregon Innovation Council designed these initiatives as part of the 2007 Innovation Plan. Listed below, these initiatives are aimed at addressing key issues which have limited Oregon's ability to capture early stage and emerging industries in the past. For example, Oregon has lacked both "angels", investors who provide funding at the earliest stages of development, and venture capital firms. While Oregon has been closing the gap, venture capital funding is available at substantially greater levels in California and Washington. Further, Oregon has not had a strong research university and more importantly has not had strong collaboration between universities and private companies. Lastly, in many emerging industries Oregon has not had a critical mass or cluster of firms by

---

<sup>1</sup> Oregon Office of Economic Analysis, Economic and Revenue Forecast, Vol. 28, No. 3, September 2008.



which to attract similar companies or the management and technical workforce with the necessary experience. As mentioned above, the State initiatives below hope to address these critical vulnerabilities.

- **Manufacturing Competitiveness** - In the 2007 Oregon Innovation Plan, the Oregon Innovation Council proposed a State investment of \$5.37 million between 2007-2009 to expand workforce training programs and the Oregon University System's ability to enhance manufacturing industry innovation through equipment, top-notch faculty and partnerships with Oregon companies. As of the 2008 Oregon Business Plan Annual report, \$2.872 million had been invested into this initiative.
- **Innovation Accelerator Fund** - This plan calls for \$5 million to be invested in the "cultivation" of innovative ideas which arise every year from established and emerging firms, entrepreneurs and academic institutions.
- **Oregon Nanoscience and Microtechnology Institute (ONAMI)** - This proposal recommends an additional \$10 million investment between 2007-2009 for the continued support of this public-private partnership between the State's top public universities and leading Oregon high-technology companies. In addition to creating jobs and allowing Oregon to recruit talented researchers, already the State is realizing sizeable returns from ONAMI as technologies are transferred to the marketplace. To date an additional \$9 million has been invested into ONAMI.
- **Oregon Translational Research and Drug Development Institute (OTRADI)** - This public-private partnership seeks to support health care and biomedical research in the State by focusing on drug research and development for the treatment of infectious diseases which will feed into a separate accelerator intended to support commercialization of products by Oregon companies. The State has invested \$5.25 million to date.
- **Bio-Economy and Sustainable Technologies (BEST) Center** - This public-private partnership intends to research and develop innovations related to bio-based technology, green buildings and clean energy. BEST is intended to enhance Oregon's competitive advantage in the growing "green" industry sector. To date, \$2.5 million has been invested.
- **Senate Bill 582** - The first of two Oregon Senate bills intended to promote innovation and emerging industry in the State, Senate Bill 582 increased the amount of allowable contributable funds University's may accept in order to establish the University Venture Development Fund. The Fund supports entrepreneurial training, education, research and startup companies.
- **Senate Bill 579** - Senate Bill 579 expanded the authority of the Oregon Growth Account allowing the Board to investment in emerging firms in early stages of development. In essence, the Senate Bill promotes growth in key target industries by providing early stage funding.
- **Transportation/Infrastructure** - Lastly are initiatives at the State and regional level to improve the State's transportation infrastructure including port districts, rail lines and airports. Included in this are highway expansion plans. Widening of Highway 217 has been approved by Metro and expansion plans are on-going for Highway 26.



## REGIONAL & LOCAL TRENDS

### DEMOGRAPHICS

Taken together, Wallowa, Union, and Baker Counties comprise Oregon's Northeast Region as defined by the Oregon Employment Department, among other governing authorities. Within the Region, Union and Baker Counties are larger contributors to economic and demographic activity, largely concentrated in the La Grande and Baker City urban areas. Only 14.5% of the regional population resides in Wallowa County. Since the 2000 census, the region has seen negligible demographic growth, with both Baker and Wallowa Counties posting net-negative population change. Realized population decline is the result of both below average birth rates and stagnate in-migration.

Where negative growth has persisted in Baker and Wallowa, the Union County population has exhibited modest growth (3.4%), adding 830 new households. Again, the majority of Union County growth occurred in the City of La Grande.

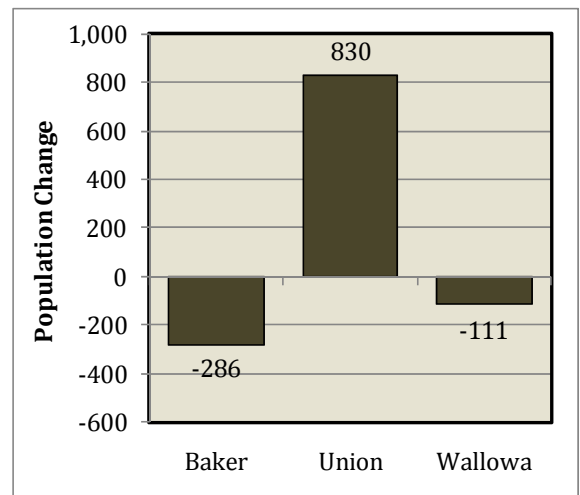
### Wallowa County Migration

In the case of Wallowa County specifically, population decay can be attributed to net-negative migration within the region. According to the United States Internal Revenue Service (IRS) Wallowa County is most closely associated with Union County. This follows anticipated logic given geographical proximity and the interconnectedness of local economies. Over the course of the current decade, Wallowa County has shifted a net change of 50+ households to Union County.

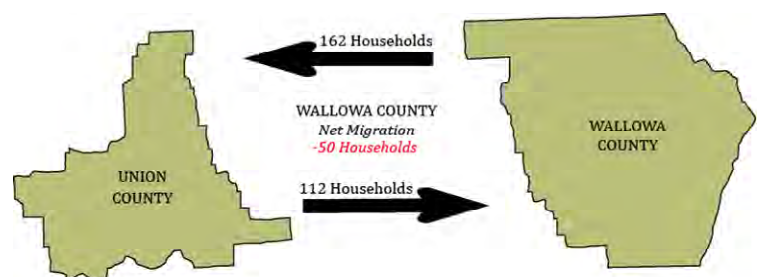
### Demographic Change in Local Jurisdictions

While Wallowa County reportedly lost 135 persons since 2000, its urban areas have maintained population levels, even exhibiting modest growth. In other words, the County's population losses have been concentrated among households living in unincorporated areas, where 40% of the County population resides. Between 2000 and 2008 the unincorporated population in Wallowa County fell by 8.5% (270 persons). Over the same interval the Cities of Enterprise (+80 persons), Joseph (+50 persons), and Wallowa (+20 persons) Combined to increase the County's urban area population by nearly 3.5%. Only the City of Lostine has lost population during the current decade (-15 persons).

**FIGURE 9: COUNTY POPULATION CHANGE. (2000-2008)**



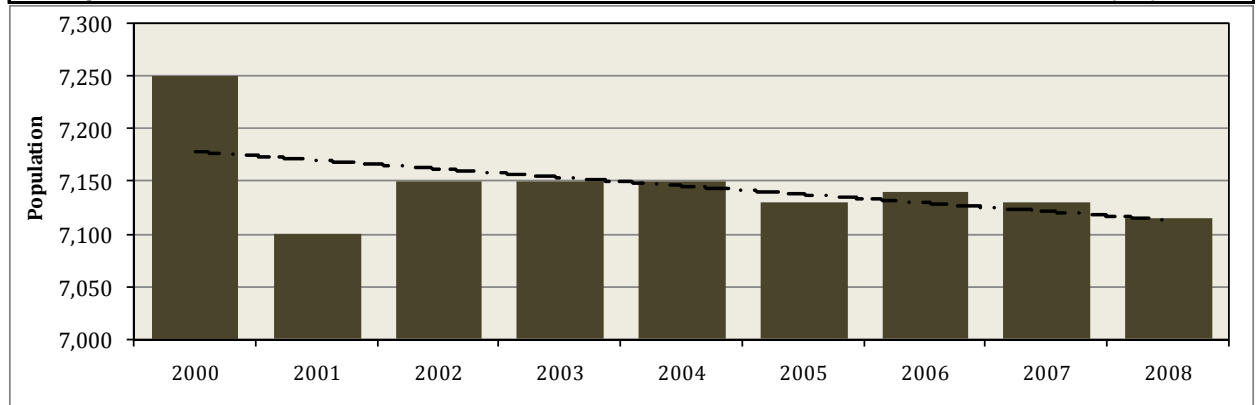
**FIGURE 10: MIGRATION BETWEEN UNION AND WALLOWA COUNTIES (2000-2007)**





**FIGURE 11: POPULATION CHANGE IN WALLOWA COUNTY BY URBAN AREA (200-2008)**

County/City	Annual Estimates									'00-'08 Change	
	2000	2001	2002	2003	2004	2005	2006	2007	2008	Pop.	%
<b>WALLOWA COUNTY</b>	<b>7,250</b>	<b>7,100</b>	<b>7,150</b>	<b>7,150</b>	<b>7,150</b>	<b>7,130</b>	<b>7,140</b>	<b>7,130</b>	<b>7,115</b>	<b>(135)</b>	<b>-1.9%</b>
Enterprise	1,895	1,890	1,920	1,920	1,940	1,945	1,945	1,940	1,975	80	4.2%
Joseph	1,055	1,060	1,070	1,080	1,080	1,090	1,095	1,100	1,105	50	4.7%
Lostine	265	260	250	250	250	250	250	250	250	(15)	-5.7%
Wallowa	870	870	870	870	870	870	870	885	890	20	2.3%
Unincorporated	3,165	3,020	3,040	3,030	3,010	2,975	2,980	2,955	2,895	(270)	-8.5%

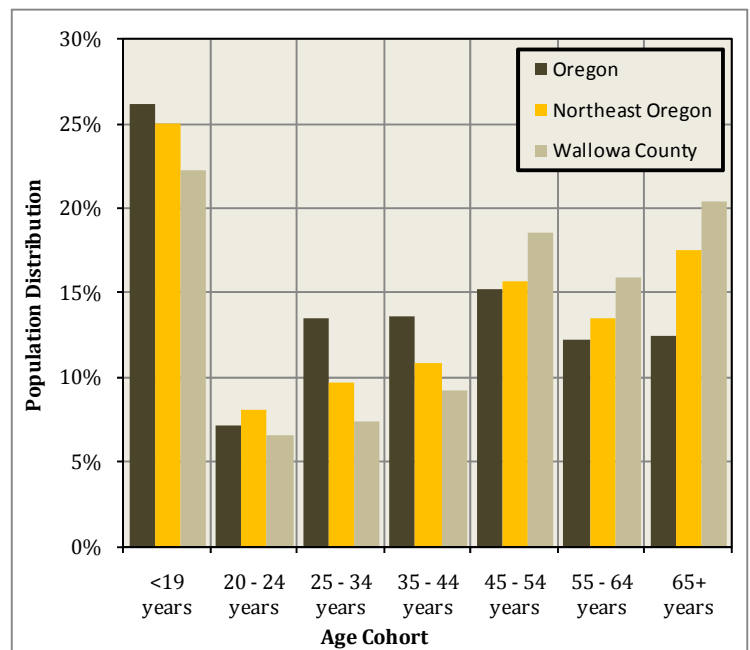


Source: Portland State University Population Research Center

### Wallowa County Demographic Characteristics

According to the Oregon Population Research Center at Portland State University, the Northeast Region has continued its established trend of having a larger retirement age population base, where the retirement age population (age 55 or older) is better than 25% higher than the statewide average. This trend is even more pronounced in Wallowa County where natural amenities and quite homely communities attract retirees. In Wallowa County 36% of the population is retirement age as compared to 24% at the state level. A strong retirement age population is a boon for specific sectors of the economy, namely services, the long-term impacts of a lower share of young and middle age households can be harmful. Specifically, where this condition exists, current and potential businesses often have difficulty finding adequate workers from a smaller labor pool, in turn, limiting entry-level opportunities for the community's youth. Failure to provide opportunities locally for a younger demographic base typically results in a "brain drain" condition, where a region's best and brightest seeks advancement opportunities elsewhere.

**FIGURE 12: POPULATION DISTRIBUTION BY AGE (2008)**





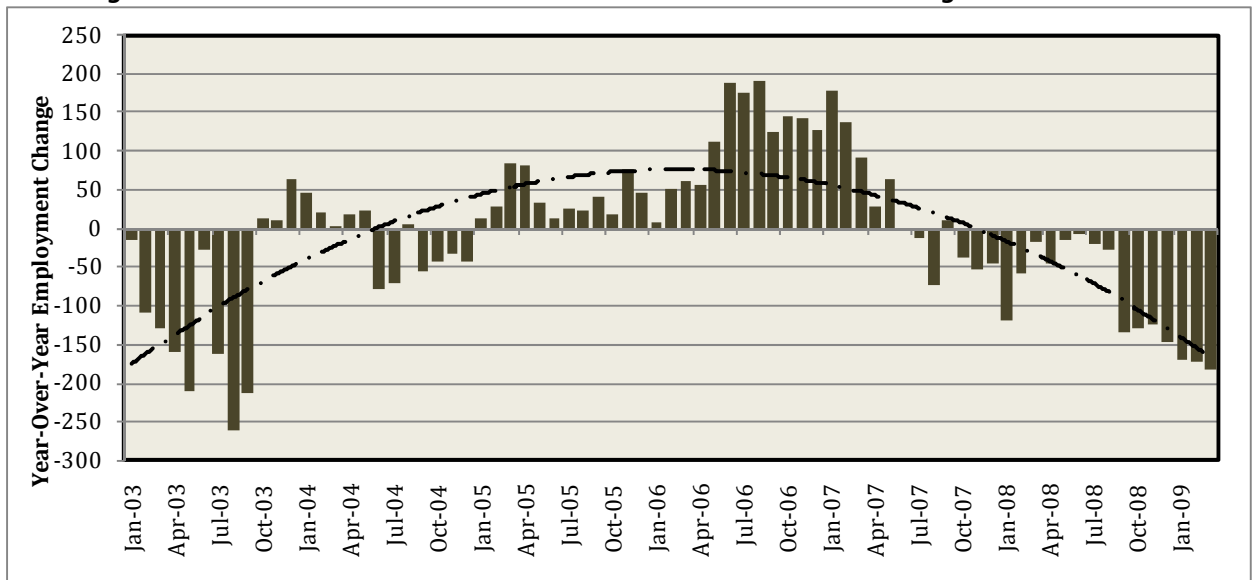
An area's level of educational attainment is often used as a proxy for the skill level of the population base. From an Economic Development perspective, Wallowa County slightly exceeds regional levels of educational attainment, albeit the region still trails statewide levels. In Wallowa County, 20.3% of local residents have a Bachelor's Degree or higher as compared to 19.6% at the regional level.

### EMPLOYMENT

Over the previous two economic cycles ('82-'90, '91-'01) unemployment in the Northeastern Oregon region has remained consistently higher than the broader State economy. In other words, regional volatility—as measured by unemployment is significantly higher than at the State level. The same can generally be applied to conditions locally in Wallowa County, where unemployment rates generally average 1 ¼ percentage points higher than the state level. Local employment volatility is the result of limited economic diversification, specifically related to the timber industry.

Between 2001 and 2008, total employment in Wallowa County grew modestly by 4.3%. However, the county's growth cycle, which began in January 2005, was measurably shorter than that of both the regional and state economy. Year-over-year employment losses began as early as July 2007, around the time when weakness began in the national housing market, and have persisted through the current period. The employed level through the first quarter of 2009 is off 5.5% from 2008 levels.

**FIGURE 13: YEAR-OVER-YEAR EMPLOYMENT GROWTH IN WALLOWA COUNTY: 2003-PRESENT**



Over the past five years several sectors of the Wallowa County economy have failed to sustain net economic growth as measured by employment. Specifically, Manufacturing (-50 jobs), Government (-20 jobs), and Transportation, Warehousing, and Utilities (-10 jobs) posted net employment losses. Among growth sectors, Construction led all sectors with 100 new jobs, followed by service industries including Education & Health (40 jobs), Leisure & Hospitality (40 jobs), and Professional & Business (40 jobs).





### Employment in Wallowa County Urban Areas

Approximately 75% of all employment is located within urban areas in Wallowa County. The majority of "non-urban" employment is concentrated in ranching, logging, and recreational/Tourism industries.

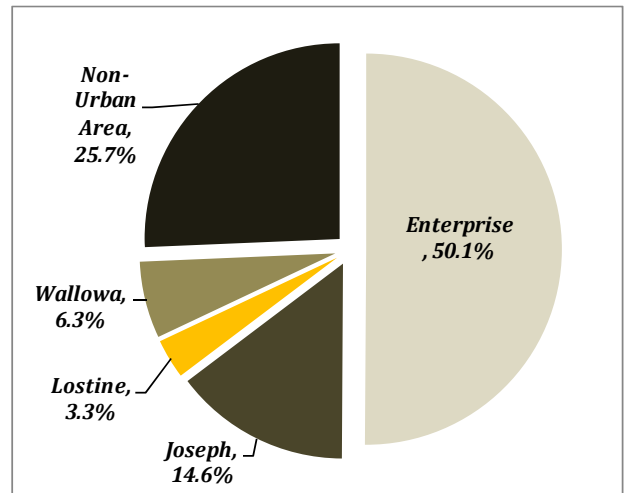
The City of Enterprise, in addition to serving as the County seat, is the principal economic driver in Wallowa County. Over 50% of County employment is located in the City of Enterprise which serves as the trade center for the County's ranching industry, among others. Both Enterprise and Joseph have developed an arts industry centered around bronze foundries and galleries.

The City of Joseph serves as the recreational and tourism hub of the county, offering direct access to Wallowa Lake, Eagle Cap Wilderness, and Hells Canyon. Over 57% of Wallowa County's Leisure & Hospitality Employment is located in and around Joseph.

The economies of Lostine and Wallowa limited by comparison. Their urban areas combine to comprise less than 10% of county employment. The primary function of industry in Wallowa and Lostine is providing services to the local and regional population. State disclosure laws prohibit detailed analysis of specific industries at this reporting level.

Employment has been on the rise on all geographic areas within Wallowa County. The communities of Enterprise and Joseph have combined to create over 160 jobs during the most recent growth cycle. Job growth was largely concentrated in the Construction, Leisure & Hospitality, and Health & Social Services industries.

**FIGURE 14: DISTRIBUTION OF WALLOWA COUNTY EMPLOYMENT (2007)**



**FIGURE 15: LOCAL EMPLOYMENT GROWTH BY URBAN AREA, WALLOWA COUNTY (2003-2007)**

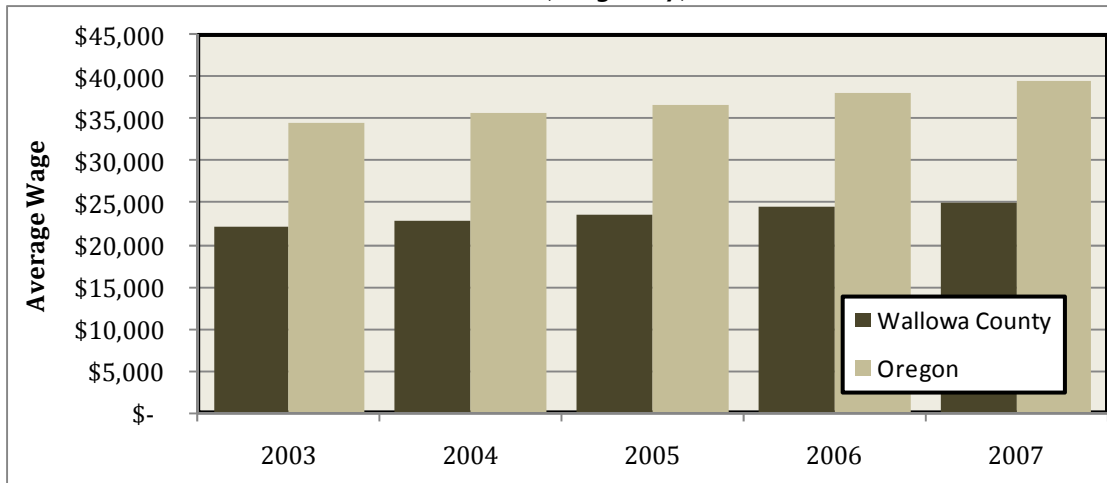
Urban Area	Year					03-'07 Change	
	2003	2004	2005	2006	2007	Jobs	%
Enterprise	1,084	1,102	1,102	1,155	1,196	111	10%
Joseph	297	288	310	350	349	52	18%
Lostine	72	69	84	81	78	6	9%
Wallowa	142	144	142	140	151	9	7%
Non-UGB	490	552	570	601	613	123	25%



## WAGES

With the exception of Natural Resources employment, average wage levels by sector in Wallowa County are significantly below wage levels statewide. Across all industries, Wallowa County wages averaged \$25,011, again approximately 63% of the Oregon average (\$39,564). Since 2003, wage levels in Wallowa County have not kept pace with wage growth statewide, averaging 3.1% annual growth compared to 3.5% at the state level. Within Northeast Oregon, Wallowa County wages are slightly below neighboring Baker (\$28,042), and Union (\$29,937) Counties. Wallowa County's lower relative wage within the region creates a competitive disadvantage in the recruitment and retention of a qualified labor pool.

**FIGURE 16: AVERAGE ANNUAL WAGE GROWTH (2003-2007)**

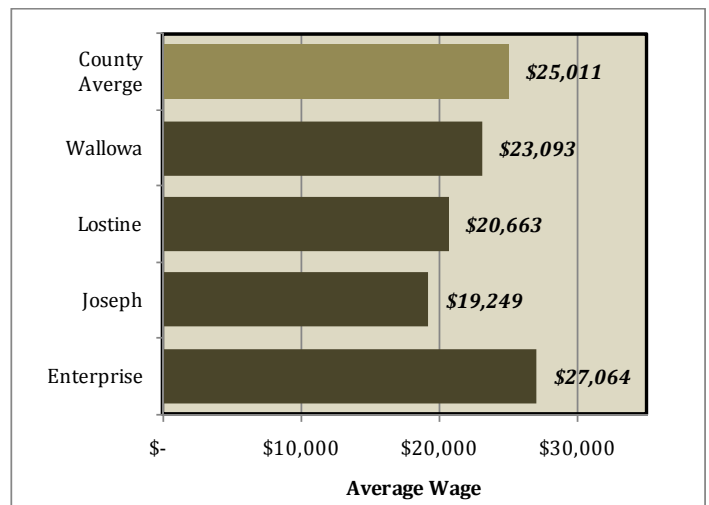


SOURCE: Oregon Employment Department

Within Wallowa County, wage levels in Enterprise (\$27,064) are around 8% higher than the county average, an indicator of the concentration of economic activity. However, Wallowa County's second largest jurisdiction Joseph, has the lowest average wage level among the four urban areas. This finding is the result of Joseph's high concentration of Leisure & Hospitality employment, an industry which typically carries low average wages in most economies.

Wallowa County's highest paid industry sectors are Wholesale Trade (\$35,270) and T.W.U. (\$33,232). However, combined the two industries make up less than 7% of local employment. Wallowa County's Natural Resources industry, which encompasses much of the region's wood products and ranching industry, has an above average wage for the region (\$32,534).

**FIGURE 17: AVERAGE WAGE BY URBAN AREA (2007)**





## OTHER FACTORS FOR ECONOMIC DEVELOPMENT POTENTIAL

In addition to the Economic indicator wage data analyzed above, other factors provide insight into the economic development potential in Wallowa County. These factors, together with their challenges and opportunities, are discussed briefly below:

- **Amenity Values-** In land use planning parlance, amenity values are encompassed in the concept of livability. The term livability is rarely, if ever, used in economic terms. But amenity values are often characterized in the field of Economics and Economic Geography because amenity values have real economic consequences. For example, Jackson Wyoming is located in a remote area and has few of the typical economic assets required for a vibrant economy. It does, however, have high amenity values that translated into a vibrant economy (Teton County has a median household income of \$54,614 compared to \$32,129 in Wallowa County<sup>2</sup>). While amenity values are qualitative and subjective in nature which can make them challenging to effectively characterize in quantitative economic terms, their real economic consequences make them worth identifying. Wallowa County and the greater Northeastern Oregon Region have a number of amenity values that create potential for economic opportunities, including but not limited to:
    - ◇ *Excellent fishing and water activities on Wallowa Lake & Snake River*
    - ◇ *Eagle Cap Wilderness*
    - ◇ *Wallowa-Whitman National Forest*
    - ◇ *Hell's Canyon National Recreation Area*
    - ◇ *Blue & Wallowa Mountain Ranges*
    - ◇ *Salt Creek Summit Sno Park*
    - ◇ *Ferguson Ridge*
    - ◇ *Alpine Meadows*
    - ◇ *Many Annual Events including Chief Joseph Days & Mountain High Broncs & Bulls.*
  - **Production Inputs (Non-Labor)** - In the past, major manufacturing in Wallowa County depended on a predictable and adequate supply of timber. Federal land management practices have changed since that time and have reduced the available supply of raw materials to the timber industry. Some efforts are underway to increase the viability of small diameter timber as an industrial supply source for wood products. In addition, woody material from wood products production is becoming an increasingly researched source for biomass energy production.
- Additionally, sitting in an ancient lakebed, Wallowa County's fertile soils have long supported an agriculture driven economy.
- **Economic Development Support Organizations** – Wallowa County has received notable attention and resources in recent years toward economic development. In 2006, Wallowa County was the subject of an RDAT (Rural Development Assistance Team) Study to develop strategies for regional economic development. Additionally, The Northeast Oregon Economic Development District and Northeast Oregon Alliance have also produced short-range economic development and investment strategies for the region. Other economic development support organizations include:
    - ◇ *Cities of Enterprise, Lostine, Wallowa, & Joseph*
    - ◇ *Wallowa County*
    - ◇ *Wallowa County Chamber of Commerce*
    - ◇ *Oregon Economic and Community Development Department (OECD)*
    - ◇ *Northeast Oregon Economic Development District*
    - ◇ *Northeast Alliance*
    - ◇ *Oregon Employment Department Region 13*

---

<sup>2</sup> 2000 Census DP-3 Sample File



- ◇ *Oregon State Governor's Office (Economic Revitalization Team)*
- ◇ *Blue Mountain Community College*

- **Educational and Technical Training Programs** - Among Wallowa County's principal challenges to economic development is the presence of technical training programs and access to a family aged workforce. Regionally, Blue Mountain Community College in Pendleton and Eastern Oregon University in La Grande service the Northeast region. Moreover, Oregon Worksource is active in providing technical workforce training and assistance.

Long term plans are currently underway in the region for the creation of an Educational Institute within Wallowa County to coordinate with regional training and educational institutions in the local community.

- **Regional Economic Development Challenges** - While the characteristics above are assets to long-term economic development in Wallowa County, there are clearly challenges to economic development that will shape the economic landscape over the planning period. Economic development challenges can be physical (i.e. location/remoteness), economic (i.e. lower wage rates), or social (i.e. community leadership). a list of key, on-going challenges is presented below
  - *Wallowa County's remoteness relative to major economic centers*
  - *Infrastructure (i.e. high speed telecommunications)*
  - *Limited skilled labor force*
  - *Affordable housing*
  - *Concentration of declining industries (i.e. Forestry)*
  - *Lack of community leadership*
  - *Unfavorable demographics, aging population*
  - *Low relative wages*
  - *Limited access to education/training centers.*



## COMPETITIVE POSITION & TARGET INDUSTRY OPPORTUNITIES

Sound economies are best organized around a healthy set of industry clusters—similar and related businesses and industries that are mutually supportive, regionally competitive, attract capital investment, and encourage entrepreneurship. As an economic development strategy, specific clusters are targeted, and emerge, when a particular geography holds an innate competitive advantage in that industry—whether it is natural resources, human capital, political policies, or geography. For example, Oregon’s oldest industries—namely forestry and agriculture, emerged from physical and environmental attributes such as its climate, trees, soils, and access to shipping and distribution networks. In turn, these industries spawned interrelated clusters that include Food Processing & Manufacturing, Wood Product Manufacturing, Wholesaling & Distribution, Machinery Manufacturing, and host of other industries.

In light of the baseline economic analysis above, JOHNSON REID reviewed Oregon Employment Department ES-202 employment data for Wallowa County and the four jurisdictions to determine industries and industry clusters in which the local economy is both regionally competitive and/or has growth potential. We have identified industry clusters with an existing competitive presence in Wallowa County and potentially emerging clusters. Identified targeted industries are evaluated in greater detail below.

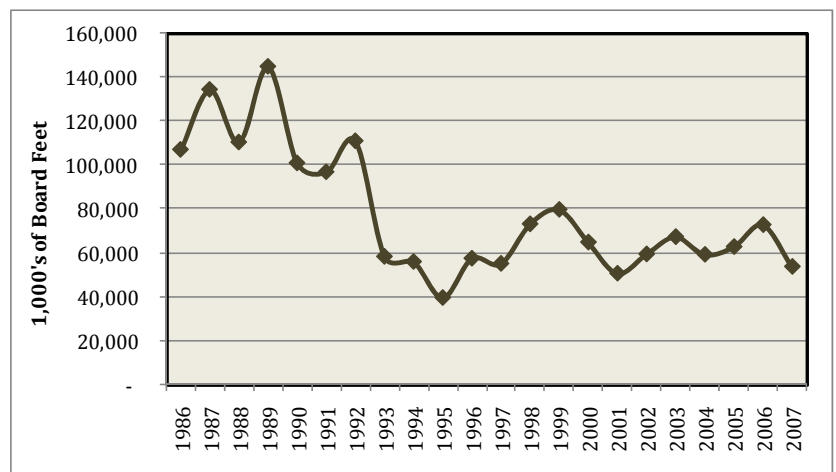
### Forestry

The forestry industry is a long standing economic driver in Wallowa County and regionally in Northeast Oregon. The cluster includes Forestry & Logging, Support Activities for Forestry, Wood Products Manufacturing, Sawmill and Woodworking Machinery Manufacturing, and Forest Management. The concentration of employment in Forestry in Wallowa County is better than seven times the national average. Despite a heavy current concentration, the industry has been in steady decline statewide for many years in light of global competition, parcelization, and regulatory changes. Production in Wallowa County is down significantly from the 1980's and 1990's. In Wallowa County, employment in Forestry has declined 17% since just 2005.

However, opportunities for industry expansion into non-traditional markets are emerging. For example, efforts are underway to increase the viability of small diameter timber as an industrial supply source for wood products.

In addition, woody material from wood products production is becoming an increasingly researched source for biomass energy production. Additionally, unlike many other timber related economies, Wallowa County does not have significant value-added wood products manufacturing industrial base.

**FIGURE 18: ANNUAL TIMBER PRODUCTION  
IN WALLOWA COUNTY (1986-2007)**





## Agriculture

Like Forestry, Agriculture is a foundation industry for Wallowa County, prevalent for its production of Wallowa County's natural resource inputs. Historically, cattle ranching, hay production, and small grain farming have been the mainstay of the industry. In recent years, Cattle production has seen a decline of roughly 34%. Going back to the 1980's, Cattle production is off nearly 50%.

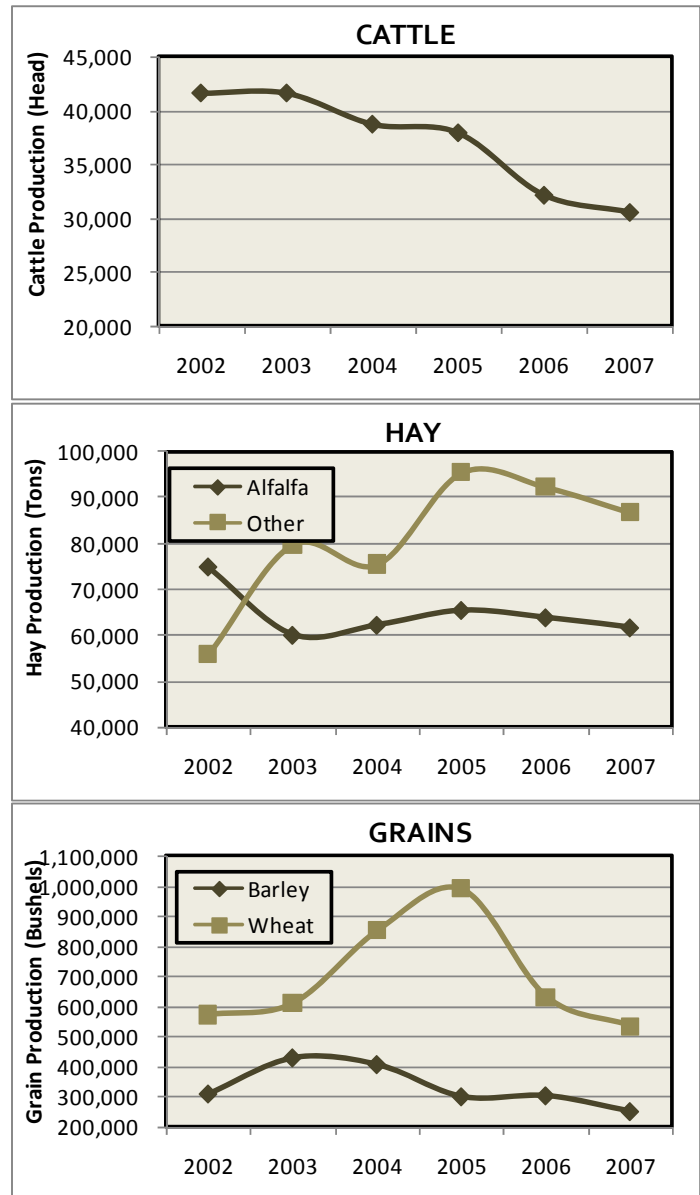
Hay production in Wallowa County has increased during the current decade, with "Other" hay production leading all gains. However, in 2007 hay production was slightly off its 2005 peak.

Grain Production, Wallowa County's final major agricultural output has also seen significant declines in recent years. Total production since 2002 is down nearly 40%.

Despite Agriculture's impact on the regional economy, which is substantial, its direct impact on employment land need within Wallowa County's urban areas is less pronounced. For example, according to the Oregon Employment Department, in 2007 the Agriculture Sector employed less than 100 persons within urban areas. Agriculture's impact on urban land need in the current economy is to a greater extent the influence of indirect and induced economic impacts.

Nevertheless, on the margin the sector's impact on land need moving forward can be substantial, as will be discussed below, a major emerging opportunity for agriculture related economic activity in the region is expansion of value-added products. Efforts to further the "Wallowa County Brand" coupled with tourism growth will continue facilitate opportunities for new agriculture related products and markets.

**FIGURE 19: ANNUAL AGRICULTURAL PRODUCTION IN WALLOWA COUNTY**





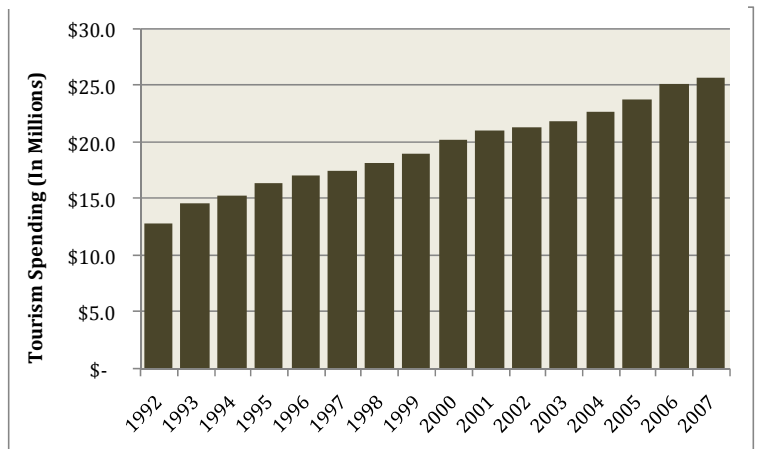
## Tourism

Wallowa County's beauty, natural amenities, and livability are central to long term economic development. Tourism driven economic activity is a growth industry in Wallowa County, with demographic forces lining up for continued growth well into the planning period. Over the last 15 years, annual tourism spending captured by the local economy has nearly doubled from \$12.9 million in 1992 to \$25.7 million in 2007. The area is well known for its recreational activities including fishing, hiking, and rafting/kayaking, among many others. Moreover, specifically in the communities of Enterprise and Joseph have a growing inventory of high end restaurants, breweries, and art galleries. Specifically, within Wallowa County over 57% of Leisure & Hospitality employment is located in the Joseph Urban Area.

Naturally, an economy influenced by tourism activity comes with associated impacts that are not always ideal. For

example, seasonal fluctuations in economic activity is problematic for small firms and services which in many cases do not operate for significant periods of the year. However, the benefit to the community of capturing non-resident dollars is that it is not a zero sum situation. That is, dollars are entering the economy from outside the region, as opposed to resident driven activity which is simply a shift of resources within the community.

**FIGURE 20: ANNUAL AGRICULTURAL PRODUCTION  
IN WALLOWA COUNTY**



## Foundries

The foundry industry in Wallowa County took form in the early 1980's as the timber industry began to wane and families searched for employment opportunities. From the regions entrepreneurial spirit arose a new industry, bronze foundries. Over time the industry took form as an artistic casting industry on an international level. As of 2007 the industry employed over 100 individuals locally, mostly in the community of Joseph. In turn, the industries impact on arts and culture attracted a host of support and similar businesses including art galleries, and alternative forms of art. Today the industry is a mainstay of the region, influencing its tourism draw across the state.

Over the long-term, the industry's capacity for growth regionally is unclear. Obviously, the majority of activity is driven by forces outside the region. Long-term growth will be contingent on the areas continued reputation for workmanship and creativity within the arts community. As the region becomes increasingly "discovered" and tourism activity continues to grow, one could expect that support for the foundry industry would expand concurrently.

## Emerging/Potential Industries

We now look more closely at emerging industries and industries that have potential for growth if properly nurtured locally. Each jurisdiction in this analysis has a very distinct character, each playing a vital role in and interconnected regional economy. Moreover, policy decisions and resources are ultimately made at the local level. For these reasons, we will evaluate this section through the prism of each community individually. This analysis has been based on trend analysis of employment data, input from the projects Technical Advisory Workshop, third party reports, and interviews with responsive jurisdictions.

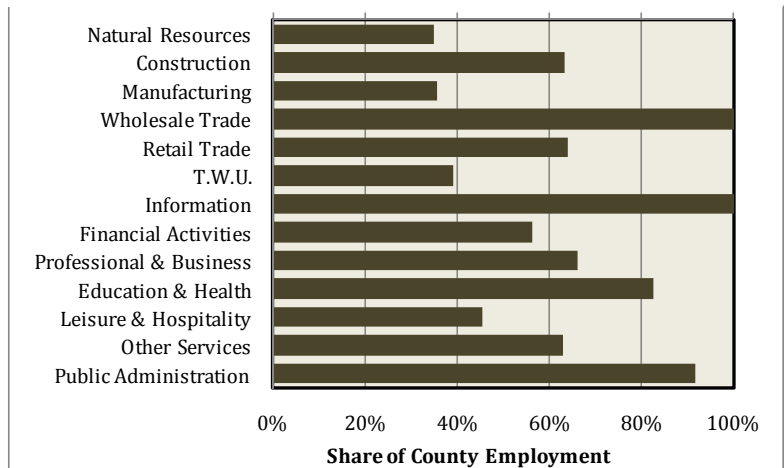




## Enterprise

The City of Enterprise is the economic hub of the County, serving as the center for commerce, services, and the regions agricultural trade. Comprising 50% of the region's urban area employment, it is by far the largest jurisdiction in the county. Looking at employment by industry segment, this condition is exemplified. Enterprise comprises over half of the County's employment in 9 of 13 major industry segments.

**FIGURE 21: SHARE OF EMPLOYMENT BY INDUSTRY IN THE ENTERPRISE URBAN AREA (2007)**



### Outlook/Aspirations

Of all the jurisdictions in Wallowa County, Enterprise is best positioned to continue attracting professional services, financial, health, and education economic activity. With the proliferation of the internet into our daily lives, commerce, and business, a major economic development challenge for the region has been limited high speed internet connectivity. With the completion of the new hospital in enterprise, the City anticipates Verizon will have a fiber optic loop in Enterprise by 2010. If achieved, this will serve to strengthen Enterprises competitive advantage in attracting people and businesses.

With the hospital moving to a new site in the Northwest section of Enterprise, it vacated its former structure on E. Park Street. The City has targeted this over the long-term to transition into the region's education institute for technical training and coordination with educational institutions in the region. As many as 20 employees are slated for this project.

The City has also identified a community need for greater retail diversity in the region. As it exists Wallowa County residents spend as much as 25% to 30% of their retail dollars outside of Wallowa County, most likely in Pendleton and LaGrande. Greater retail diversity would serve to retain more domestic spending locally in support of local retailers. The City of Enterprise is evaluating the opportunities for a main streets program better define and enhance commerce in the City's downtown.

Declining grain prices, federal farm policies, changing consumer choices and intense competition for agricultural commodities have created a sudden need to explore alternative production/marketing strategies. Value added agriculture is the process of increasing the economic value and consumer appeal of an agriculture commodity, and should be an economic development objective for jurisdictions in Wallowa County. As mentioned in the industry section above, Wallowa County has a high concentration raw materials and agriculture production. However, unlike many other agriculture based economies in Oregon, Wallowa County is underrepresented in associated value added industries. Examples include food processing & wood products manufacturing. The advancement and business adoption of the Wallowa County branding effort will help facilitate this industry expansion in the long term. The City of Enterprise has plans to explore a "Wallowa County Brand Center", a centralized physical store/location for businesses to market their branded products and services.

## TARGETED INDUSTRIES

- Professional Services
- Education Services
- Retail
- Value Added Agriculture



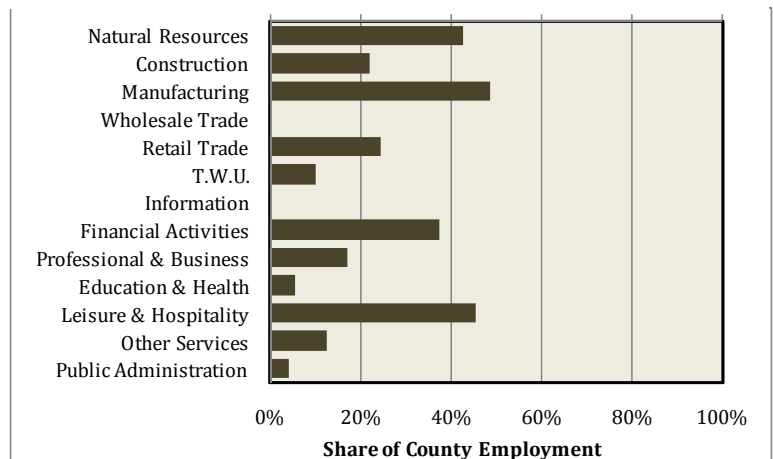
## Joseph

With its location most proximate to Wallowa Lake and the region's other natural amenities, The City of Joseph is naturally the tourism and arts hub of the region. The jurisdiction comprises nearly half of all urban area employment in Leisure & Hospitality and the majority of manufacturing in bronze foundries. Additionally, significant financial services employment is located in Joseph. Joseph is the second largest economy in Wallowa County, comprising nearly 20% of all urban area employment.

### *Outlook/Aspirations*

The Joseph economy is well positioned to continue attracting tourism activity in the region. As mentioned above, we anticipate tourism growth to continue well into the planning period as demographic factors and reputation line up well for the region. Specifically, With increased tourism activity, the City of Joseph is likely to see additional growth in its retirement age population. This will become a policy decision for the City on its preference to accommodate this growth in its long-range planning. While this is more of a housing need issue, housing and economic activity are inherently related and growth in this base is likely to put added pressure/support on the City's economic base.

**FIGURE 22: SHARE OF EMPLOYMENT BY INDUSTRY IN THE JOSEPH URBAN AREA**



For a community the size of Joseph, niche industries that fit the character and culture of the community are often strong economic development opportunities. This has already been exemplified in Joseph with the establishment and growth of the foundry industry. A new potential opportunity on the horizon is niche/recreational manufacturing. The best example of this industry in Oregon is its development in Hood River. Hood River became known for its outdoor recreation, specifically kite boarding, wind surfing, and with proximity to Mt. Hood, winter/mountain sports. Over time, out of entrepreneurial spirit arose a cluster of niche firms specializing in manufacturing recreational equipment on a smaller scale. In Joseph, local knowledge of fishing, hunting, rafting, kayaking etc. combined with exhibited entrepreneurship lends well to economic opportunity.

## TARGETED INDUSTRIES

- Tourism Growth
- Niche Manufacturing
- Arts & Recreation
- Value Added Agriculture

Finally, and again associated with the tourism industry, the City of Joseph will have continued opportunity to expand and diversify its arts, culture, and recreation industry. The City is considering seeking grant monies to establish a pseudo interpretive center located on Joseph's main street to highlight the cultural and artistic significance and assets of the community. Annual events, activities, and the Wallowa branding effort are valuable inputs to the industry's development.



## Lostine/Wallowa

For disclosure purposes of confidential employment data, we take a look at the communities of Lostine and Wallowa combined. The economies of Lostine and Wallowa are quite small, comprising only 78 and 151 total employees in each urban area, respectively.

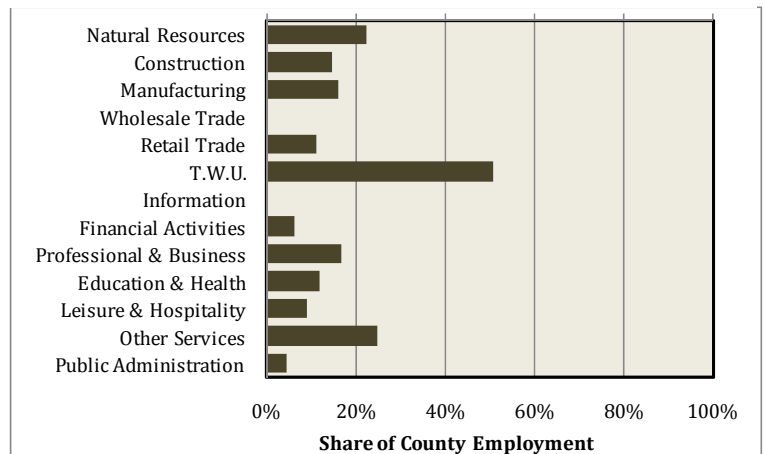
**FIGURE 23: SHARE OF EMPLOYMENT BY INDUSTRY  
IN THE LOSTINE/WALLOWA URBAN AREAS**

Given the size of these communities, it is difficult highlight specific industries with opportunities for growth. For example a single ten employee firm in Lostine would represent a 13% increase in the City's economic base. Therefore, we address these communities more anecdotally.

### *Outlook/Aspirations*

With their western location relative to Enterprise and Joseph, and nearest to LaGrande/Pendleton, these communities have an inherent locational advantage in T.W.U., and to a certain extent manufacturing. Both industries are likely to be central to Wallowa's on-going economic development, given the amount and characteristics of its land supply. The City of Wallowa Currently has roughly 79 net buildable acres of commercial land within its UGB (of which industrial development in considered a conditional use). Moreover, this land has site characteristics suitable for industrial development, including several large parcels. Wallowa's old mill site has reportedly received attention for possible cogeneration facility.

Lostine on the other hand, does not have a supply of developable land within its urban growth boundary. Moreover, the City is to a certain extent restricted in its development aspirations, as sewer infrastructure need will be triggered with growth. For this reason, the City of Lostine has a less aspirational approach to economic development.



## TARGETED INDUSTRIES

- Industrial Manufacturing (Wallowa)
- Value Added Agriculture
- Transportation, Warehousing, Utilities



# TWENTY-YEAR EMPLOYMENT FORECAST

## INTRODUCTION

This analysis outlines a forecast of employment within the urbanized areas of Wallowa County. The employment forecasts were generated through 2028. The primary source of data on current employment patterns was derived from the State of Oregon Employment Department's ES-202 reports. For disclosure purposes, employment by industry sector has been aggregated into general land use categories by Johnson Reid. Employment in This section is limited to urban area employment, employer firms located outside of urban areas were excluded from this analysis

## CREATING A BASE YEAR ESTIMATE

### Conversion to Total Employment:

For the year 2007, ES-202 reports estimate employment in Wallowa County urban areas to total 1,774 employees. However, our source ES-202 data reports "covered employment" only—employer firms that tracked through unemployment insurance. Because this data omits a significant portion of the workforce that are not covered (i.e. sole-proprietors, self-employed, commission workers) we must revise our estimates to reflect true employment. Estimates from the Bureau of Economic Analysis (BEA) indicate that in 2007 covered employment accounted for approximately 64% of total employment in Wallowa County, with individual estimates calculated by land use type. Assuming that Wallowa County urban areas roughly track the countywide trend, we estimate the *total* employed level in 2007 to be in the area 2,744 employees.

**FIGURE 24: CONVERSION OF COVERED EMPLOYMENT TO TOTAL EMPLOYMENT (2007)**

Area	Land Use Type				Total
	Office	Industrial	Commercial	Specialized	
<b><u>2007 Covered Employment</u></b>					
Enterprise	462	202	282	250	1,196
Joseph	94	84	140	31	349
Lostine	27	36	8	7	78
<u>Wallowa</u>	<u>41</u>	<u>33</u>	<u>44</u>	<u>34</u>	<u>151</u>
<b>WALLOWA COUNTY TOTAL</b>	<b>623</b>	<b>356</b>	<b>474</b>	<b>321</b>	<b>1,774</b>
<i>Covered Share of Total</i>	<i>60%</i>	<i>64%</i>	<i>60%</i>	<i>85%</i>	<i>64%</i>
<b><u>2007 Total Employment</u></b>					
Enterprise	715	311	471	286	1,784
Joseph	212	131	234	43	621
Lostine	50	61	15	9	134
<u>Wallowa</u>	<u>66</u>	<u>55</u>	<u>74</u>	<u>40</u>	<u>236</u>
<b>WALLOWA COUNTY TOTAL</b>	<b>1,043</b>	<b>558</b>	<b>794</b>	<b>379</b>	<b>2,774</b>

SOURCE: U.S. Bureau of Economic Analysis, Oregon Employment Department, & Johnson Reid



### Update to Base Year Estimate:

The second step to creating our base year estimate is updating our 2007 total employment estimate to the current period. This process involves the evaluation of countywide economic trends between 2007 and 2008 in addition to current knowledge about the local economic activity in Wallowa County. Outlined in FIGURE 25, we assume that between 2007 and 2008 the Wallowa County economy contracted slightly, falling by roughly 1.7% to 2,727 total employees. This estimate will be utilized as the basis of our long-term employment forecast.

**FIGURE 25: UPDATING 2007 TOTAL EMPLOYMENT TO THE CURRENT PERIOD (2008)**

Area	Land Use Type				Total
	Office	Industrial	Commercial	Specialized	
<b><u>2007 Total Employment Estimate</u></b>					
Enterprise	715	311	471	286	1,784
Joseph	212	131	234	43	621
Lostine	50	61	15	9	134
<u>Wallowa</u>	<u>66</u>	<u>55</u>	<u>74</u>	<u>40</u>	<u>236</u>
<b>WALLOWA COUNTY TOTAL</b>	<b>1,043</b>	<b>558</b>	<b>794</b>	<b>379</b>	<b>2,774</b>
<i>2007-2008 Assumed Growth Rate</i>	<i>-0.4%</i>	<i>-3.8%</i>	<i>-6.3%</i>	<i>7.7%</i>	<i>-1.7%</i>
<b><u>2008 Total Employment Estimate</u></b>					
Enterprise	716	309	439	308	1,772
Joseph	207	117	221	47	593
Lostine	49	61	14	9	134
<u>Wallowa</u>	<u>67</u>	<u>51</u>	<u>69</u>	<u>43</u>	<u>229</u>
<b>WALLOWA COUNTY TOTAL</b>	<b>1,039</b>	<b>537</b>	<b>744</b>	<b>408</b>	<b>2,727</b>

SOURCE: Oregon Employment Department, & Johnson Reid

## **FUTURE EMPLOYMENT GROWTH**

### BASELINE EMPLOYMENT FORECAST

FIGURE 26 outlines the State of Oregon's most recent employment growth forecast for Region 13 which includes Union, Baker, and Wallowa Counties. The State's outlined growth rates were used as baseline estimates to forecast the rate of employment growth by industry in this analysis.

- *Over the forecast period (2006–2016), the region's employment growth is projected to average 1.1% across all industries.*
- *The Education & Health (2.5% AAGR) and Leisure & Hospitality (1.5% AAGR) sectors are expected to display accelerated growth at the regional level during the period. Only modest rates of growth are expected in the Manufacturing (0.4% AAGR) and T.W.U. (0.3% AAGR) sectors while Natural Resources (-0.4% AAGR) is projected to post negative growth over the forecast period.*
- *Modest projected growth in the Manufacturing sector reflects anticipated declines in many traditional industries, offset by expansion in other manufacturing firms. While current operations may decline in employment, a commensurate decline in land utilization is not anticipated, as these firms are not expected to reduce property needs.*



**FIGURE 26: ANTICIPATED REGIONAL GROWTH, REGION 13**

Industry/ Land Use	Region 13 Estimate		AAGR
	2006	2016	
<b><u>By NAICS Class</u></b>			
Natural Resources	230	220	-0.4%
Construction	920	1,030	1.1%
Manufacturing	2,460	2,560	0.4%
Trade	2,750	3,050	1.0%
T.W.U. 1,	780	800	0.3%
Information	260	270	0.4%
Financial Activities	740	820	1.0%
Professional & Business	810	950	1.6%
Education & Health	2,140	2,730	2.5%
Leisure & Hospitality	1,740	2,020	1.5%
Other Services	580	660	1.3%
Government	4,670	5,090	0.9%
<b><u>By Land Use Type</u></b>			
OFFICE	7,603	8,522	1.1%
INDUSTRIAL	5,810	6,207	0.7%
COMMERCIAL	2,892	3,300	1.3%
SPECIALIZED	1,775	2,171	2.0%
<b>TOTAL</b>	<b>18,080</b>	<b>20,200</b>	<b>1.1%</b>

SOURCE: Oregon Employment Department

#### **BASELINE EMPLOYMENT FORECAST BY LAND USE TYPE**

For the purposes of identifying land need, we now stratify total employment growth estimated above across employment sectors in the Wallowa County economy. This is an important step in the analysis as different industry sectors require varying types and characteristics of land. However, as mentioned above, for disclosure purposes, Johnson Reid has aggregated employment forecasts by NAICS sector into general land use categories. In FIGURE 27, the baseline total employment forecast is stratified across land use categories based on Oregon Employment Department (OED) Region 11 forecasts and historical trends from ES-202 reports.

FIGURE 27 presents a forecast of total employment for Wallowa County and its urban areas between 2008 and 2028. As shown, the baseline employment forecast anticipates an increase of 815 jobs, reflecting an average annual growth rate of 1.3%. Across the County, significant employment gains are expected in existing employment sectors, leading to support for Office, Commercial, and Specialized Land Use types.

The State's regional forecast of manufacturing employment; which includes a pessimistic outlook for all manufacturing, produces a limited forecast of less than 85 new industrial supporting jobs in Wallowa County over the planning period.



**FIGURE 27: EMPLOYMENT FORECAST BY LAND USE CATEGORY, WALLOWA COUNTY, OREGON (2008-2028)**

BASELINE ORGANIC GROWTH FORECAST	Base Year	FORECAST				'08-'28 Change	
	2008	2013	2018	2023	2028	Jobs	AAGR
<b><u>ENTERPRISE</u></b>							
Office	716	766	821	880	945	229	1.4%
Industrial	309	322	336	351	367	59	0.9%
Commercial	439	467	496	528	561	122	1.2%
Specialized	308	341	378	419	465	157	2.1%
<b>Total</b>	<b>1,772</b>	<b>1,896</b>	<b>2,031</b>	<b>2,178</b>	<b>2,339</b>	<b>567</b>	<b>1.4%</b>
<b><u>JOSEPH</u></b>							
Office	207	220	234	249	264	57	1.2%
Industrial	117	119	122	125	128	11	0.5%
Commercial	221	236	251	267	285	64	1.3%
Specialized	47	51	55	60	65	17	1.6%
<b>Total</b>	<b>593</b>	<b>626</b>	<b>662</b>	<b>701</b>	<b>742</b>	<b>149</b>	<b>1.1%</b>
<b><u>LOSTINE</u></b>							
Office	49	52	55	59	62	13	1.2%
Industrial	61	62	64	66	68	7	0.6%
Commercial	14	16	17	18	19	5	1.4%
Specialized	9	10	11	12	14	4	1.8%
<b>Total</b>	<b>134</b>	<b>140</b>	<b>147</b>	<b>155</b>	<b>163</b>	<b>29</b>	<b>1.0%</b>
<b><u>WALLOWA</u></b>							
Office	67	72	77	83	90	24	1.5%
Industrial	51	52	54	56	58	7	0.7%
Commercial	69	73	77	82	87	18	1.2%
Specialized	43	48	53	58	64	21	2.0%
<b>Total</b>	<b>229</b>	<b>245</b>	<b>261</b>	<b>279</b>	<b>299</b>	<b>70</b>	<b>1.3%</b>
<b>WALLOWA COUNTY TOTAL</b>	<b>2,727</b>	<b>2,907</b>	<b>3,102</b>	<b>3,313</b>	<b>3,543</b>	<b>815</b>	<b>1.3%</b>

#### ALTERNATIVE GROWTH SCENARIOS

The baseline scenario evaluated above is based on the estimated Wallowa County share of the State's regional employment forecast, incorporating a share of growth allocated to each urban area based on historical capture and available land. However, Wallowa County jurisdictions have economic development goals, aspirations, and resources that are not necessarily reflected in the State's demographically driven forecast. Therefore, the critical analysis composed in the targeted industry chapter above, interviews with the jurisdictions, input from the Technical Advisory Committee, and lastly, the policy goals and objectives of the Cities were used to derive alternative estimates of economic growth over the planning period. As such FIGURE 28 below outlines changes to the baseline growth rates by industry which reflect targeted and potential economic growth over the 20-year planning horizon. Key changes from the baseline rate are as follows:

#### All Jurisdictions

- Medium Growth Forecast: A 10% acceleration in the baseline rate across all industries
- High Growth Forecast: A 20% acceleration in the baseline rate across all industries

#### City of Enterprise

- Target industry adjustments to Manufacturing, Retail Trade, Financial Services, Professional & Business, and Education & Health Services

#### City of Joseph

- Target industry adjustments to Retail Trade, Manufacturing, and Leisure & Hospitality





### City of Lostine

- Target industry adjustments to Manufacturing

### City of Wallowa

- Target industry adjustments to Manufacturing and T.W.U.

**FIGURE 28: ALTERNATIVE GROWTH ADJUSTMENTS BY INDUSTRY, WALLOWA COUNTY URBAN AREAS (2008-2028)**

NAICS Class	Baseline Rate	Enterprise		Joseph		Lostine		Wallowa	
		Medium	High	Medium	High	Medium	High	Medium	High
Natural Resources	-0.4%	0.5%	0.75%	0.5%	0.75%	0.5%	0.75%	0.5%	0.75%
Construction	1.1%	1.2%	1.4%	1.2%	1.4%	1.2%	1.4%	1.2%	1.4%
Manufacturing	0.4%	0.7%	0.8%	2.4%	3.4%	0.8%	1.0%	3.2%	4.4%
Wholesale Trade	1.0%	1.1%	1.2%	1.1%	1.2%	1.1%	1.2%	1.1%	1.2%
Retail Trade	1.0%	1.3%	1.4%	1.3%	1.4%	1.1%	1.2%	1.1%	1.2%
T.W.U. 1,	0.3%	0.3%	0.3%	0.3%	0.3%	0.3%	0.3%	2.0%	2.8%
Information	0.4%	0.4%	0.5%	0.4%	0.5%	0.4%	0.5%	0.4%	0.5%
Financial Activities	1.0%	1.3%	1.3%	1.1%	1.2%	1.1%	1.2%	1.1%	1.2%
Professional & Business	1.6%	2.0%	2.2%	1.8%	1.9%	1.8%	1.9%	1.8%	1.9%
Education & Health	2.5%	2.5%	3.5%	2.7%	3.0%	2.7%	3.0%	2.7%	3.0%
Leisure & Hospitality	1.5%	1.7%	1.8%	2.0%	2.2%	1.7%	1.8%	1.7%	1.8%
Other Services	1.3%	1.4%	1.6%	1.4%	1.6%	1.4%	1.6%	1.4%	1.6%
Government	0.9%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%

■ = Targeted Industry Augmentation

The alternative forecasts have the greatest impacts on the Industrial and office land use categories. Additionally, Retail Employment and Education & Health Services also displays a notable uptick under the alternative scenarios. Alternative 20-year employment forecast scenarios by industry are presented in FIGURE 29 below. Alternative forecasts extend the employment growth horizon to 979 to 1,213 net new jobs over the planning period in Wallowa County's urban areas.



**FIGURE 29: ALTERNATIVE EMPLOYMENT GROWTH FORECASTS BY LAND USE TYPE, WALLOWA COUNTY URBAN AREAS (2008-2028)**

ALTERNATIVE 1 MEDIUM GROWTH FORECAST	Base Year	FORECAST				'08-'28 Change	
	2008	2013	2018	2023	2028	Jobs	AAGR
<b><u>ENTERPRISE</u></b>							
Office	716	772	833	901	974	258	1.6%
Industrial	309	325	343	361	381	72	1.1%
Commercial	439	472	507	545	585	146	1.4%
Specialized	308	341	379	421	468	160	2.1%
<b>Total</b>	<b>1,772</b>	<b>1,910</b>	<b>2,062</b>	<b>2,227</b>	<b>2,408</b>	<b>636</b>	<b>1.5%</b>
<b><u>JOSEPH</u></b>							
Office	207	222	239	256	275	67	1.4%
Industrial	117	126	136	147	160	43	1.6%
Commercial	221	240	260	281	305	84	1.6%
Specialized	47	52	56	61	67	19	1.7%
<b>Total</b>	<b>593</b>	<b>640</b>	<b>690</b>	<b>746</b>	<b>806</b>	<b>213</b>	<b>1.5%</b>
<b><u>LOSTINE</u></b>							
Office	49	52	56	60	64	15	1.3%
Industrial	61	63	65	67	70	9	0.7%
Commercial	14	16	17	18	20	5	1.6%
Specialized	9	10	11	13	14	5	2.0%
<b>Total</b>	<b>134</b>	<b>141</b>	<b>149</b>	<b>158</b>	<b>167</b>	<b>34</b>	<b>1.1%</b>
<b><u>WALLOWA</u></b>							
Office	67	72	79	86	94	28	1.8%
Industrial	51	56	61	67	74	23	1.9%
Commercial	69	73	78	83	89	20	1.3%
Specialized	43	48	54	60	67	23	2.2%
<b>Total</b>	<b>229</b>	<b>249</b>	<b>272</b>	<b>297</b>	<b>324</b>	<b>95</b>	<b>1.8%</b>
<b>WALLOWA COUNTY TOTAL</b>	<b>2,727</b>	<b>2,940</b>	<b>3,173</b>	<b>3,428</b>	<b>3,706</b>	<b>979</b>	<b>1.5%</b>
ALTERNATIVE 2 HIGH GROWTH FORECAST	Base Year	FORECAST				'08-'28 Change	
	2008	2013	2018	2023	2028	Jobs	AAGR
<b><u>ENTERPRISE</u></b>							
Office	716	784	860	946	1,043	327	1.9%
Industrial	309	327	347	367	390	81	1.2%
Commercial	439	476	515	558	605	166	1.6%
Specialized	308	354	407	470	543	236	2.9%
<b>Total</b>	<b>1,772</b>	<b>1,940</b>	<b>2,129</b>	<b>2,341</b>	<b>2,581</b>	<b>809</b>	<b>1.9%</b>
<b><u>JOSEPH</u></b>							
Office	207	224	242	262	283	76	1.6%
Industrial	117	129	143	160	179	62	2.2%
Commercial	221	242	264	288	315	94	1.8%
Specialized	47	52	57	63	69	22	1.9%
<b>Total</b>	<b>593</b>	<b>647</b>	<b>706</b>	<b>772</b>	<b>846</b>	<b>253</b>	<b>1.8%</b>
<b><u>LOSTINE</u></b>							
Office	49	53	57	61	65	16	1.4%
Industrial	61	63	65	68	71	10	0.8%
Commercial	14	16	17	19	20	6	1.7%
Specialized	9	10	12	13	15	5	2.2%
<b>Total</b>	<b>134</b>	<b>142</b>	<b>151</b>	<b>161</b>	<b>171</b>	<b>38</b>	<b>1.2%</b>
<b><u>WALLOWA</u></b>							
Office	67	73	81	89	98	32	2.0%
Industrial	51	57	65	73	84	33	2.5%
Commercial	69	74	79	85	91	23	1.4%
Specialized	43	49	55	62	69	26	2.4%
<b>Total</b>	<b>229</b>	<b>253</b>	<b>279</b>	<b>309</b>	<b>343</b>	<b>113</b>	<b>2.0%</b>
<b>WALLOWA COUNTY TOTAL</b>	<b>2,727</b>	<b>2,981</b>	<b>3,265</b>	<b>3,583</b>	<b>3,940</b>	<b>1,213</b>	<b>1.9%</b>



# TWENTY-YEAR EMPLOYMENT LAND NEEDS ANALYSIS

---

## INTRODUCTION

This section summarizes the projected need for commercial and industrial land associated with the employment projections through 2028. Results are followed by a description of the methodology employed by JOHNSON REID to project the need for commercial and industrial space, and subsequently, commercial and industrial land.

Determining the County's required site types involves qualitative and quantitative analysis. The qualitative analysis describes the site characteristics expected to be demanded by firms during the planning period. There are three components to the quantitative analysis. The first describes the types of firms likely to locate in Wallowa County during the planning period. This component was completed through the Target Industry Opportunities Analysis. The second component involves projections of employment. These employment projections have been summarized in the previous section. The third component combines these employment projections with the qualitative understanding of site requirements by land use type to project the commercial and industrial land need and the demanded numbers of sites.

## SUMMARY OF COMMERCIAL AND INDUSTRIAL LAND NEED FINDINGS

The results summarized in FIGURE 30 highlight projections of net new demand within Wallowa County's urban areas for commercial and industrial land between 2008 and 2028. Detailed findings by use type and growth scenario are included in the technical appendix. Over the next twenty years, net new demand for commercial and industrial land is expected to range from 64 to 83 net buildable acres, contingent upon Wallowa County's realized growth pattern through 2028. The mid-range "medium Growth Scenario" indicates that Wallowa County can expect aggregate commercial and industrial land need in the vicinity of 76.1 acres through 2028; additional acreage may be necessary to accommodate particular numbers and types of sites expected to be demanded.

LAND USE TYPE	EMPLOYEES PER ACRE
Commercial Office	38
Industrial	11
Commercial Retail	5
Specialized Uses	25

These projections reflect **net** developable land, required only for building and impervious surface space requirements. Roads, right-of-ways, parks and public facilities, among other things necessary to serve projected land development, are not included. While the methodology is not based on a set density per acre assumption, the output reflects the following average jobs per net acre by broad land employment development categories.



**FIGURE 30: PROJECTED AGGREGATE NEED FOR COMMERCIAL AND INDUSTRIAL LAND IN WALLOWA COUNTY URBAN AREAS (NET & GROSS BUILDABLE ACRES) (2008-2028)**

	NET ACRES			GROSS ACRES		
	Baseline Growth	Medium Growth	High Growth	Baseline Growth	Medium Growth	High Growth
<b>WALLOWA COUNTY TOTAL</b>						
<b>Commercial Office</b>	8.5	9.7	11.9	10.7	12.1	14.9
<b>Industrial</b>	7.7	13.4	16.9	9.6	16.7	21.1
<b>Commercial Retail</b>	39.5	44.7	48.7	49.4	55.9	60.9
<i>Resident-Driven</i>	19.0	20.0	21.3	23.8	25.0	26.6
<i>Non-Resident</i>	12.9	15.2	15.6	16.1	19.0	19.6
<i>Overnight Lodging</i>	7.6	9.6	11.8	9.5	12.0	14.7
<b>Specialized Uses</b>	8.0	8.3	11.5	10.0	10.4	14.4
<b>TOTAL LAND NEED</b>	<b>63.7</b>	<b>76.1</b>	<b>89.0</b>	<b>79.6</b>	<b>95.2</b>	<b>111.3</b>

In addition to the demand for actual sites, the need for public rights of way and infrastructure must be estimated in order to project the total amount of lands that would be required in the event the Urban Growth Boundary were expanded to provide land for needed employment sites. The DLCDD Goal 9 guidebook recommends 25% for City's that would largely be extending infrastructure into new areas to serve new development. This would be the predominant pattern in Wallowa County for lands outside the UGB and so the below figure converts the acreages from Net Acres to total gross land demand by category. FIGURE 31 projects the total land demand for Wallowa County.

Results in Figure 31 outlines aggregate need in all of Wallowa County's urban areas individually.

**FIGURE 31: PROJECTED AGGREGATE NEED FOR COMMERCIAL AND INDUSTRIAL LAND IN WALLOWA COUNTY URBAN AREAS (NET & GROSS BUILDABLE ACRES) (2008-2028)**

	NET ACRES			GROSS ACRES		
	Baseline Growth	Medium Growth	High Growth	Baseline Growth	Medium Growth	High Growth
<b>ENTERPRISE</b>						
<b>Commercial Office</b>	6.0	6.8	8.6	7.6	8.5	10.8
<b>Industrial</b>	5.3	6.5	7.4	6.7	8.2	9.2
<b>Commercial Retail</b>	15.0	16.7	18.2	18.7	20.8	22.7
<i>Resident-Driven</i>	8.0	8.4	8.9	9.9	10.5	11.2
<i>Non-Resident</i>	4.6	5.2	5.5	5.7	6.5	6.8
<i>Overnight Lodging</i>	2.4	3.1	3.8	3.1	3.8	4.7
<b>Specialized Uses</b>	6.3	6.4	9.4	7.9	8.0	11.8
<b>TOTAL LAND NEED</b>	<b>32.6</b>	<b>36.4</b>	<b>43.6</b>	<b>40.8</b>	<b>45.5</b>	<b>54.5</b>

	NET ACRES			GROSS ACRES		
	Baseline Growth	Medium Growth	High Growth	Baseline Growth	Medium Growth	High Growth
<b>JOSEPH</b>						
<b>Commercial Office</b>	1.5	1.8	2.0	1.9	2.2	2.5
<b>Industrial</b>	1.0	3.9	5.6	1.3	4.9	7.0
<b>Commercial Retail</b>	16.4	19.1	20.9	20.4	23.9	26.1
<i>Resident-Driven</i>	5.6	5.9	6.3	7.0	7.4	7.8
<i>Non-Resident</i>	6.3	7.6	7.8	7.9	9.6	9.7
<i>Overnight Lodging</i>	4.4	5.5	6.8	5.5	6.9	8.5
<b>Specialized Uses</b>	0.7	0.8	0.9	0.9	1.0	1.1
<b>TOTAL LAND NEED</b>	<b>19.6</b>	<b>25.5</b>	<b>29.4</b>	<b>24.5</b>	<b>31.9</b>	<b>36.7</b>



	NET ACRES			GROSS ACRES		
	Baseline Growth	Medium Growth	High Growth	Baseline Growth	Medium Growth	High Growth
<b>LOSTINE</b>						
<b>Commercial Office</b>	0.3	0.4	0.4	0.4	0.5	0.5
<b>Industrial</b>	0.6	0.8	0.9	0.8	1.0	1.2
<b>Commercial Retail</b>	2.7	2.9	3.2	3.3	3.7	4.0
<i>Resident-Driven</i>	1.5	1.6	1.7	1.9	2.0	2.1
<i>Non-Resident</i>	0.7	0.8	0.9	0.9	1.1	1.1
<i>Overnight Lodging</i>	0.4	0.5	0.6	0.5	0.6	0.7
<b>Specialized Uses</b>	0.2	0.2	0.2	0.2	0.2	0.3
<b>TOTAL LAND NEED</b>	3.8	4.3	4.7	4.8	5.4	5.9

	NET ACRES			GROSS ACRES		
	Baseline Growth	Medium Growth	High Growth	Baseline Growth	Medium Growth	High Growth
<b>WALLOWA</b>						
<b>Commercial Office</b>	0.6	0.7	0.8	0.8	0.9	1.0
<b>Industrial</b>	0.6	2.1	3.0	0.8	2.7	3.8
<b>Commercial Retail</b>	5.5	6.0	6.5	6.9	7.6	8.1
<i>Resident-Driven</i>	3.9	4.1	4.4	4.9	5.1	5.5
<i>Non-Resident</i>	1.3	1.5	1.5	1.6	1.8	1.9
<i>Overnight Lodging</i>	0.4	0.5	0.6	0.5	0.6	0.7
<b>Specialized Uses</b>	0.8	0.9	1.0	1.0	1.2	1.3
<b>TOTAL LAND NEED</b>	7.6	9.8	11.4	9.6	12.3	14.2

## INDUSTRIAL, OFFICE, AND SPECIALIZED USE LAND NEED METHODOLOGY

Demand for industrial and office commercial land is a direct function of employment growth in industrial sectors that occupy this type of space. As a result, our projections of industrial and office demand are based on forecasted employment growth by industrial sector within Wallowa County. Methodology for forecasting need for industrial and office commercial land follow a standard, multi-step process, summarized below. Detailed tables for Wallowa County and each jurisdiction individually are found in the technical appendix to this document.

### Demand for Office Building Space

Sector employment growth for each of the three economic scenarios is converted into growth in office employment based on typical percentages of jobs, or capture factors, by sector that will be located in office development rather than industrial development. Employment density ratios, the average space in square feet necessary per office job, were utilized to calculate total office space demand given projected employment growth. Ratios and densities utilized are from the Urban Land Institute.

### **[Exhibit 1.01]**

### Demand for Office Commercial Land

Demand for office land is a conversion of demand for space by an office floor area ratio (FAR). FAR is defined as the gross leasable building area divided by the buildable land area used. For example, a 5,000 square foot office building on a 10,000 square foot site would be an example of a 0.50 FAR. For projections under each of the three economic scenarios, JOHNSON REID assumed a relatively conservative 0.35 FAR. While surface parked office space can be produced at an FAR up to 0.50, the historic pattern in Wallowa County has included more single storey structures at a substantially lower ratio.

### **[Exhibit 1.02]**



## Demand for Industrial Building Space

Wallowa County's industry employment growth for each of the three economic scenarios is converted into growth in industrial employment based on typical percentages of employment by sector that will be located in industrial space. Employment is then further stratified by type of space, including warehouse/distribution, general industrial and high-tech/flex space. Finally, employment density ratios, calculated as average square feet of space necessary per industrial job, were utilized to calculate total space demand by industrial space type given projected employment growth. These ratios and densities are based on industry standards.

### ***[Exhibits 1.03]***

## Demand for Industrial Land

Demand for industrial land is a conversion of demand for space by floor area ratios (FARs) by industrial development type and the addition of non-industrial use demand for industrial land typical of business park space. Projections utilize the following FARs:

- *Warehouse/Distribution: 0.31*
- *General Industrial: 0.30; and*
- *High-Tech/Flex: 0.26.*

Second, a 10% non-industrial use demand for land was assumed for industrial land projections.<sup>3</sup>

### ***[Exhibits 1.04]***

## Demand for Specialized Use Land

Demand for specialized use land simply follows the same process as office and industrial land above. Specialized uses are alternative development forms such as hospitals, clinics, schools, and construction yards that do not necessarily conform to typical development forms. Forecasted employment in these sectors (a share of construction, education, and health industries) are transformed to land need by a typical employment density for specialized uses, in this case, 25.0 employees per acre.

### ***[Exhibits 1.05]***

## **RETAIL COMMERCIAL LAND METHODOLOGY**

Unlike industrial and office commercial land need, retail land need is a direct function of households moving into Wallowa County, typical spending patterns by those households and visitor/tourist spending. Methodology for forecasting retail commercial land need is summarized below.

## Household Growth Projections

For modeling growth in retail commercial land need driven by residential growth, JOHNSON REID utilized household growth rates within Wallowa County urban areas across the planning period.

**FIGURE 32:**

Urban Area	Assumed Share
Enterprise	32%
Joseph	20%
Lostine	5%
Wallowa	15%
Unincorporated	28%

<sup>3</sup> Non industrial uses in industrial districts include office space as well as support retail.



The Baseline Growth Scenario utilized population growth forecasts outlined by the Oregon Office of Economic Analysis for Wallowa County. This analysis assumed the following distribution of population across each urban area. The distribution in FIGURE 32 assumes a trend toward urbanization on the horizon and in addition to a greater share of population to the Joseph area as a result of anticipated retirement age population growth.

Adjustments were made for Medium and High growth scenario forecasts for sensitivity purposes in accordance accelerated employment forecasts. Population was converted to households by assuming a linear shift in persons per household from 2.3 in 2008 to 2.26 in 2028. Baseline, Medium, and High growth scenarios, and resulting household growth projections through 2028, were estimated as follows:

- **Baseline Growth Scenario:** Assumes household growth rate of 0.57% annually.
- **High Growth Scenario:** Assumes household growth rate of 0.64% annually.
- **Medium Growth Scenario:** Assumes household growth rate of 0.74% annually.

### Estimated Wallowa County Per-Household Retail Spending

JOHNSON REID estimated per-household annual spending by retail category utilizing data derived from the US Bureau of Labor Statistics Consumer Expenditure Survey. Categories are as detailed in the following table by the North American Industry Classification System (NAICS).

Additionally, our methodology assumed 1.5% average annual real income growth over the 20-year period. This assumption is consistent with average annual real income growth between the 1990 and 2000 Census

**FIGURE 33: AVERAGE HOUSEHOLD EXPENDITURES ON RETAIL GOODS, WALLOWA COUNTY**

NAICS	Category	Per HH Expenditures
441	Motor Vehicles and Parts Dealers	\$ 8,122
442	Furniture and Home Furnishings Stores	\$ 900
443	Electronics and Appliance Stores	\$ 839
444	Building Materials and Garden Equipment	\$ 4,155
445	Food and Beverage Stores	\$ 4,989
446	Health and Personal Care Stores	\$ 2,053
448	Clothing and Clothing Accessories Stores	\$ 1,408
451	Sporting Goods, Hobby, Book and Music Stores	\$ 653
452	General Merchandise Stores	\$ 4,453
453	Miscellaneous Store Retailers	\$ 1,000
722	Foodservices and Drinking Places	\$ 3,402
	<b>Total</b>	<b>\$ 31,975</b>

SOURCE: Bureau of Labor Statistics (BLS), Claritas Inc. and JOHNSON REID

### Estimate Future Wallowa County Resident-Driven Retail Sales

Future retail sales originating within Wallowa County urban areas were simply calculated as the product of future household counts under the medium, high, and low growth scenarios through 2028 and annual average retail sales by category.

**[Exhibit 1.6]**





### Demand for Retail Commercial Space

Future retail sales are converted into need for developed retail space by calculating the product of future Wallowa County retail sales by category to a category-specific Sales Support Factor. The Sales Support Factor is the national average retail sales per square foot of space for each category of retail. Sales support factors are from the Urban Land Institute publication *Dollars & Cents*.

**[Exhibit 1.7]**

### Demand for Retail Commercial Land

Demand estimates for developed retail space at different time points was then converted into demand for retail commercial land by applying the industry-standard retail Floor Area Ratio (FAR) of 0.25. The FAR assumes standard suburban retail space requiring one parking space per 1,000 square feet of retail floor area.

**[Exhibit 1.8]**

### Region/Visitor Spending Projections

In addition to quantifying retail support from residents within the urban areas of Wallowa County, we also need to understand retail support from residents of unincorporated Wallowa County and tourist activity. Associated tables are included in the technical appendix.

#### **Unincorporated Resident Support**

This process simply involved an estimation of the unincorporated population over the forecast period and allocating its support across the urban areas. This allocation was determined by each jurisdiction's existing share of retail employment in the County.

#### **Tourism Support**

This process involved making estimates of future tourism spending in the county and allocating that support across the County's urban areas. The Oregon Tourism Commission has estimates of tourism activity by county and spending type. In 2007 total sales were roughly \$18.4 million. Since 1991 tourism spending growth has averaged roughly 4.6% annually. This 16-year growth rate was utilized in forecasting future tourism spending over the planning period. Spending was allocated across urban areas by a weighted share of each areas Retail and Leisure & Hospitality employment.

**[Exhibit 1.9]**



## EXISTING LAND SUPPLY AND SUITABILITY ANALYSIS

### SUMMARY OF COMMERCIAL AND INDUSTRIAL LAND SUPPLY

The objective of this section is to calculate the number of acres of buildable land in each plan designation that allows commercial and industrial a uses in the existing Urban Growth Boundary (UGB) and city limits of the cities in Wallowa County: Enterprise, Joseph, Wallowa, and Lostine. Buildable land is defined as land that is suitable and available and necessary for the designated uses.

The following analysis uses methodologies suggested by the *Industrial & Other Employment Lands Analysis Guidebook* produced by the Oregon Department of Land Conservation and Development (DLCD). The steps used in this methodology have been followed to the greatest extent possible, given the data available for the cities in Wallowa County.

The Benkendorf Associates Corp. (TBAC) performed a visual inventory of all land uses and vacant lands in the cities in December 2008. TBAC refined this inventory through further County GIS data analysis and aerial photography in January and February 2009.

Table II-1 below shows a summary of the gross buildable acres and net buildable acres for the commercial and industrial land use zones in each of the four cities. This data is from the detailed inventory presented in the section for each city. As shown, in the table, among the four cities, there is a total of 139.99 net buildable acres of commercially-zoned land and 46.46 net buildable acres of industrially-zoned land, for a total of 186.45 net buildable acres.

INDEX OF TABLES
<b>Table II.1</b> Summary of Inventory of Net Buildable Land by Zoning District
<b>Table III.1</b> City of Enterprise Zoning Districts
<b>Table III.2</b> Enterprise: Land Within the City Limits and UGB by Zoning District
<b>Table III.3</b> Enterprise: Inventory of Vacant Parcels by Commercial Zoning District
<b>Table III.4</b> Enterprise: Summary of Vacant Parcels within UGB & City by Commercial Zoning District
<b>Table III.5</b> Enterprise: Inventory of Net Buildable Land by Commercial Zoning District
<b>Table IV.1</b> City of Joseph Zoning Districts
<b>Table IV.2</b> Joseph: Land Within the City Limits and UGB by Zoning District
<b>Table IV.3</b> Joseph: Inventory of Vacant Parcels by Commercial and Industrial Zoning District
<b>Table IV.4</b> Joseph: Summary of Vacant Parcels within UGB & City by Commercial and Industrial Zoning District
<b>Table IV.5</b> Joseph: Inventory of Net Buildable Land by Zoning District
<b>Table V.1</b> City of Wallowa Zoning Districts
<b>Table V.2</b> Wallowa: Land Within the City Limits and UGB by Zoning District
<b>Table V.3</b> Wallowa: Inventory of Vacant Parcels by Commercial Zoning District
<b>Table V.4</b> Wallowa: Summary of Vacant Parcels within UGB & City by Commercial Zoning District
<b>Table V.5</b> Wallowa: Inventory of Net Buildable Land by Commercial Zoning District
<b>Table VI.1</b> City of Lostine Zoning Districts
<b>Table VI.2</b> Lostine: Land Within the City Limits and UGB by Zoning District
<b>Table VI.3</b> Lostine: Inventory of Vacant Parcels by Commercial Zoning District
<b>Table VI.4</b> Lostine: Summary of Vacant Parcels within UGB & City by Commercial Zoning District
<b>Table VI.5</b> Lostine: Inventory of Net Buildable Land by Commercial Zoning District



**TABLE II.1: SUMMARY OF INVENTORY OF NET BUILDABLE LAND BY ZONING DISTRICT**

Zone	Zone Code	Buildable parcels	Gross Buildable acres	Net Buildable acres
<b>Enterprise UGB Limits</b>		<b>42</b>	<b>78.22</b>	<b>58.66</b>
<b>Commercial</b>		<b>42</b>	<b>78.22</b>	<b>58.66</b>
City of Enterprise, Light Commercial	E/C-1	30	62.77	47.08
City of Enterprise, Heavy Commercial	E/C-2	5	4.46	3.34
City of Enterprise, Central Business District	E/CBD	1	0.31	0.23
City of Enterprise, Commercial View	E/C-V	6	10.68	8.01
<b>Joseph UGB Limits</b>		<b>20</b>	<b>64.66</b>	<b>48.5</b>
<b>Commercial</b>		<b>8</b>	<b>2.72</b>	<b>2.04</b>
City of Joseph, Commercial	J-COM	8	2.72	2.04
<b>Industrial</b>		<b>12</b>	<b>61.94</b>	<b>46.46</b>
City of Joseph, Industrial	J-M1	12	61.94	46.46
<b>Wallowa UGB Limits</b>		<b>33</b>	<b>105.39</b>	<b>79.04</b>
<b>Commercial</b>		<b>33</b>	<b>105.39</b>	<b>79.04</b>
City of Wallowa, Commercial	W-COM.	25	22.66	16.99
County of Wallowa, Commercial	W-C1	8	82.73	62.05
<b>Lostine UGB Limits</b>		<b>1</b>	<b>0.33</b>	<b>0.25</b>
<b>Commercial</b>		<b>1</b>	<b>0.33</b>	<b>0.25</b>
City of Lostine, Commercial	L-COM	1	0.33	0.25
<b>TOTAL</b>		<b>96</b>	<b>248.6</b>	<b>186.45</b>
<b>Commercial</b>		<b>84</b>	<b>186.66</b>	<b>139.99</b>
<b>Industrial</b>		<b>12</b>	<b>61.94</b>	<b>46.46</b>

## ENTERPRISE COMMERCIAL AND INDUSTRIAL LAND SUPPLY

### Gross Buildable Vacant Acres by Zoning District

Table III.1 shows the land use zones in the City of Enterprise Zoning Ordinance.

**TABLE III.1: CITY OF ENTERPRISE ZONING DISTRICTS**

Zone	Code
<b>Commercial</b>	
City of Enterprise, Light Commercial	E/C-1
City of Enterprise, Heavy Commercial	E/C-2
City of Enterprise, Central Business District	E/CBD
City of Enterprise, Commercial View	E/C-V
<b>Residential</b>	
City of Enterprise, Single Family Residential	E/R-1
City of Enterprise, Single/Dbf Family Residential	E/R-2
City of Enterprise, Multiple Family Residential	E/R-3
<b>Other</b>	
City of Enterprise, Airport	E/A-1
City of Enterprise, Hospital	E/H-1
City of Enterprise, Open Space	E/OS

SOURCE: City of Enterprise Zoning Code



Table III.2 lists the total acres and total parcels for each land use zone within the City limits and within the Urban Growth Boundary (UGB).

**TABLE III.2: ENTERPRISE: LAND WITHIN THE CITY LIMITS AND UGB BY ZONING DISTRICT**

<b>Zone</b>	<b>Total Acres</b>	<b>Total Parcels</b>
E/C-1	192.11	248
E/C-2	38.29	36
E/CBD	7.3	47
E/C-V	18.8	10
E/R-1	39.03	94
E/R-2	243.54	453
E/R-3	88.64	216
E/A-1	125.13	27
E/H-1	1.49	1
<b>SUBTOTAL City</b>	<b>754.33</b>	<b>1,132</b>
E/C-1	21.12	12
E/C-V	23.51	2
E/A-1	13.31	2
E/OS	53.44	1
<b>SUBTOTAL UGB</b>	<b>90.26</b>	<b>17</b>
<b>TOTAL</b>	<b>844.59</b>	<b>1,149</b>

SOURCE: The Benkendorf Associates Corp.

Table III.3 below contains an inventory of the gross buildable acreage of all parcels with commercial zoning (there is no industrial zoning) identified as vacant within the City limits and UGB. The parcels have been given two classifications:

- “Vacant” – 100% of the parcel has been identified as buildable;
- “Partially vacant” – parcels with some development on the site and with development potential on the vacant portion of the site.

The “unbuildable acres” column represents the area of the parcel that was identified as unbuildable for a variety of reasons, including: parcels committed to development, areas of partially vacant parcels dedicated to existing structures, and size.

The “unbuildable acres” column is subtracted from the “total acres” to determine the “final gross buildable acres” figure. As shown in Table III.3, a total of 79.17 gross acres of commercial land (no industrial land) in the City of Enterprise and its UGB is classified as vacant and buildable, out of a total of 49 vacant parcels containing 98.17 acres.

A map showing all of the parcels listed in Table III.3 is shown at the end of this section.



**TABLE III.3: ENTERPRISE: INVENTORY OF VACANT PARCELS BY COMMERCIAL ZONING DISTRICT**

Parcel	Zone	Classification	Notes	Total Acres	Unbuildable Acres	Final Gross Buildable Acres
01S4435CA100	E/C-1	Partially Vacant		14.16	9.75	4.41
01S4435CA205	E/C-1	Vacant		0.47	0	0.47
01S4435CC347	E/C-1	Vacant		0.51	0	0.51
01S4435CD1206	E/C-1	Vacant		0.33	0	0.33
01S4435CD2801	E/C-1	Vacant		0.26	0	0.26
01S4435DA1700	E/C-1	Vacant		0.3	0	0.3
01S4435DB1600	E/C-1	Partially Vacant		9.28	2.5	6.78
01S4435DB1701	E/C-1	Vacant		2.93	0	2.93
01S4435DB500	E/C-1	Vacant		0.19	0	0.19
01S4435DB600	E/C-1	Vacant		0.14	0	0.14
01S4435DB700	E/C-1	Partially Vacant		1.14	1	0.14
01S4435DC1001	E/C-1	Vacant		0.33	0	0.33
02S440100400	E/C-1	Partially Vacant		17.42	0.5	16.92
02S4401BC1500	E/C-1	Vacant		1.03	0	1.03
02S4401BC1502	E/C-1	Vacant		5.34	0	5.34
02S4401BC1503	E/C-1	Vacant		1.93	0	1.93
02S4401BC1504	E/C-1	Vacant		0.83	0	0.83
02S4401BC1505	E/C-1	Vacant		0.42	0	0.42
02S4401BC1600	E/C-1	Vacant		0.45	0	0.45
02S4402AA6100	E/C-1	Vacant		0.61	0	0.61
02S4402AB1900	E/C-1	Vacant		0.3	0	0.3
02S4402AB2800	E/C-1	Vacant		0.28	0	0.28
02S4402AB3400	E/C-1	Vacant		0.26	0	0.26
02S4402AB3800	E/C-1	Vacant		0.3	0	0.3
02S4402AB3900	E/C-1	Vacant		0.08	0	0.08
02S4402AB4400	E/C-1	Vacant		0.15	0	0.15
02S4402AC4700	E/C-1	Vacant		1.39	0	1.39
02S4402AC5400	E/C-1	Vacant		1.26	0	1.26
02S4402AC5702	E/C-1	Vacant		0.36	0	0.36
02S4402AD1701	E/C-1	Vacant		0.6	0	0.6
02S4402AD2400	E/C-1	Vacant		1.39	0	1.39
02S4403001200	E/C-1	Vacant		5.34	0	5.34
02S4403001300	E/C-1	Vacant		3	0	3
02S4403001400	E/C-1	Vacant		0.23	0	0.23
01S4435CA207	E/C-1	Partially Vacant		3.36	1.6	1.76
01S4435CA202	E/C-1	Partially Vacant		3.84	1.3	2.54
02S4402004817	E/C-2	Partially Vacant		0.51	0.25	0.26
02S4402004816	E/C-2	Partially Vacant		1.66	0.8	0.86
02S4402DA400	E/C-2	Partially Vacant		1.86	0.9	0.96
02S4402DA500	E/C-2	Partially Vacant		1.27	0.4	0.87
02S4402DA800	E/C-2	Vacant		1.51	0	1.51
02S4402AA1600	E/CBD	Vacant		0.15	0	0.15
02S4402AB3700	E/CBD	Vacant		0.31	0	0.31
02S440300102	E/C-V	Vacant		2.98	0	2.98
02S440300106	E/C-V	Vacant		0.96	0	0.96
02S440300108	E/C-V	Vacant		0.75	0	0.75
02S4403001100	E/C-V	Vacant		4.72	0	4.72
02S440300111	E/C-V	Vacant		0.77	0	0.77
02S440300112	E/C-V	Vacant		0.51	0	0.51
<b>TOTAL</b>				<b>98.17</b>	<b>19</b>	<b>79.17</b>

SOURCE: The Benkendorf Associates Corp.



Table III.4 below shows a summary of the data in Table III.3 by zoning district. All commercially-zoned land with a final gross buildable land area of less than 0.25 acre. Sites of these sizes are incidental to the scope of examining the city's long term (20 year) land use needs.

**TABLE III.4: SUMMARY OF VACANT PARCELS WITHIN UGB & CITY BY COMMERCIAL ZONING DISTRICT**

Primary zone	Total		Vacant			Partially Vacant/ Redevelopable			Unbuildable 1/	
	Parcels	Total Acres	Parcels	Total Acres	Buildable Acres	Parcels	Total Acres	Buildable Acres	Parcels	Total Unbuildable Acres
E/C-1	260	213.23	25	30.23	30.23	5	49.19	32.54	6	0.93
E/C-2	36	38.29	1	1.51	1.51	4	5.3	2.95	1	0.15
E/CBD	47	7.3	1	0.31	0.31				1	0.21
E/C-V	12	42.31	6	10.68	10.68					
<b>TOTAL</b>	<b>355</b>	<b>301.13</b>	<b>33</b>	<b>42.73</b>	<b>42.73</b>	<b>9</b>	<b>54.49</b>	<b>35.49</b>	<b>8</b>	<b>1.29</b>

1/ Commercial zoned parcels with final gross buildable acres less than 0.25 acre.

SOURCE: The Benkendorf Associates Corp.

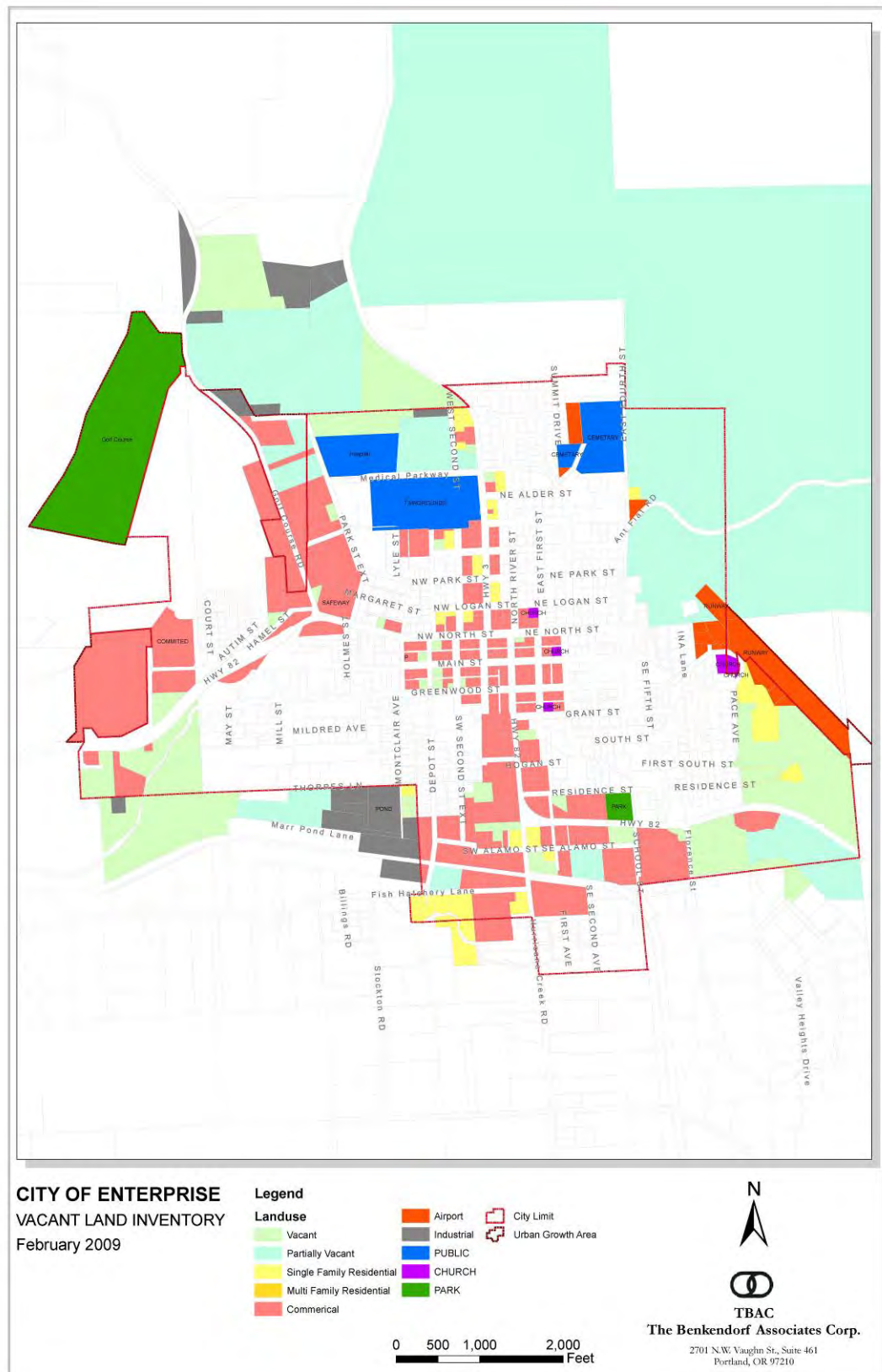
### Net Buildable Vacant Acres by Zoning District

Table III.5 shows the inventory of all gross buildable vacant acres within the City of Enterprise UGB and the conversion to the net buildable acres by deducting 25% of the parcel for infrastructure. As shown in the table, there are 58.67 net buildable commercial acres.

**TABLE III.5: ENTERPRISE: INVENTORY OF NET BUILDABLE LAND BY COMMERCIAL ZONING DISTRICT**

Zone	Zone Code	Buildable parcels	Gross Buildable acres	Net Buildable acres
<b>Enterprise UGB Limits</b>		<b>42</b>	<b>78.22</b>	<b>58.67</b>
City of Enterprise, Light Commercial	E/C-1	30	62.77	47.08
City of Enterprise, Heavy Commercial	E/C-2	5	4.46	3.34
City of Enterprise, Central Business District	E/CBD	1	0.31	0.23
City of Enterprise, Commercial View	E/C-V	6	10.68	8.01

SOURCE: The Benkendorf Associates Corp.







## JOSEPH COMMERCIAL AND INDUSTRIAL LAND SUPPLY

### Gross Buildable Vacant Acres by Zoning District

Table IV.1 shows the land use zones in the City of Joseph Zoning Ordinance.

**TABLE IV.1: CITY OF JOSEPH ZONING DISTRICTS**

<b>Zone</b>	<b>Code</b>
<b>Commercial</b>	
City of Joseph, Commercial	J-COM
City of Enterprise, Heavy Commercial	E/C-2
City of Enterprise, Central Business District	E/CBD
City of Enterprise, Commercial View	E/C-V
<b>Industrial</b>	
City of Joseph, Industrial	J-M1
County, Industrial	M-1
City of Joseph, Industrial	J-M1
<b>Residential</b>	
City of Joseph, General Residential	J-GR
City of Joseph, Select Residential	J-SR
County, Residential	R-1
<b>Other</b>	
City of Joseph, Urban Growth Area	J-UGA
Exclusive Farm Use	EFU

SOURCE: City of Joseph Zoning Code

Table III.2 lists the total acres and total parcels for each land use zone within the City limits and within the Urban Growth Boundary (UGB).



**TABLE IV.2: JOSEPH: LAND WITHIN THE CITY LIMITS AND UGB BY ZONING DISTRICT**

<b>Zone</b>	<b>Total Acres</b>	<b>Total Parcels</b>
J-COM	22.22	102
J-M1	99.16	17
M-1	0.18	1
J-GR	121.89	281
J-SR	191.9	389
EFU	0.61	1
J-UGA	0.77	1
<b>SUBTOTAL City</b>	<b>436.73</b>	<b>792</b>
J-GR	0.37	2
J-SR	0.61	1
J-UGA	107.79	14
<b>SUBTOTAL UGB</b>	<b>108.76</b>	<b>17</b>
<b>TOTAL</b>	<b>545.49</b>	<b>809</b>

SOURCE: The Benkendorf Associates Corp.

Table IV.3 below contains an inventory of the gross buildable acreage of all parcels with commercial and industrial zoning identified as vacant within the City limits and UGB. The parcels have been given two classifications:

- “Vacant” – 100% of the parcel has been identified as buildable;
- “Partially vacant” – parcels with some development on the site and with development potential on the vacant portion of the site.

The “unbuildable acres” column represents the area of the parcel that was identified as unbuildable for a variety of reasons, including: parcels committed to development, areas of partially vacant parcels dedicated to existing structures, and size.

The “unbuildable acres” column is subtracted from the “total acres” to determine the “final gross buildable acres” figure. As shown in Table IV.3, a total of 66.2 gross acres of commercial and industrial land in the City of Joseph and its UGB is classified as vacant and buildable, out of a total of 30 vacant parcels containing 79.05 acres.

A map showing all of the parcels listed in Table IV.3 is shown at the end of this section.



**TABLE IV.3: JOSEPH: INVENTORY OF VACANT PARCELS BY COMMERCIAL AND INDUSTRIAL ZONING DISTRICT**

Parcel	Zone	Classification	Notes	Total Acres	Unbuildable Acres	Final Gross Buildable Acres
02S4529CB500	J-COM	Vacant		0.73	0	0.73
02S4529CC3300	J-COM	Vacant	Steep Slope	0.21	0.21	0
02S4529CC3400	J-COM	Vacant	Steep Slope	0.72	0.72	0
02S4529CC4600	J-COM	Vacant		0.13	0	0.13
02S4529CC8400	J-COM	Vacant		0.22	0	0.22
02S4530DA1200	J-COM	Vacant		0.27	0	0.27
02S4530DA1300	J-COM	Vacant		0.22	0	0.22
02S4530DA600	J-COM	Vacant		0.44	0	0.44
02S4530DD5500	J-COM	Vacant		0.28	0	0.28
02S4530DD5800	J-COM	Vacant		0.13	0	0.13
02S4531AA1100	J-COM	Partially Vacant		0.67	0.4	0.27
02S4531AA1200	J-COM	Vacant		0.2	0	0.2
02S4531AA1300	J-COM	Vacant		0.47	0	0.47
02S4531AA401	J-COM	Vacant		0.13	0	0.13
02S4532BB1400	J-COM	Vacant		0.18	0	0.18
02S4532BB2501	J-COM	Vacant		0.13	0	0.13
02S4532BB6000	J-COM	Vacant		0.27	0	0.27
02S4530001407	J-M1	Partially Vacant		6.17	4	2.17
02S4530001700	J-M1	Vacant		14.32	0	14.32
02S4530002100	J-M1	Vacant		4.84	0	4.84
02S453000601	J-M1	Partially Vacant		4.15	2	2.15
02S453000602	J-M1	Partially Vacant		10.18	5	5.18
02S453000603	J-M1	Vacant		10.71	0	10.71
02S453000604	J-M1	Vacant		0.75	0	0.75
02S453000605	J-M1	Vacant		13.88	0	13.88
02S453000700	J-M1	Partially Vacant		3.22	0.5	2.72
02S453000701	J-M1	Vacant		1.99	0	1.99
02S4530DA207	J-M1	Vacant		1.79	0	1.79
02S4530DA504	J-M1	Vacant		1.43	0	1.43
02S4530DC300	M-1	Vacant		0.18	0	0.18
<b>TOTAL</b>				<b>79.03</b>	<b>12.83</b>	<b>66.2</b>

SOURCE: The Benkendorf Associates Corp.

Table IV.4 below shows a summary of the data in Table III.3 by zoning district. All commercially-zoned land with a final gross buildable land area of less than 0.25 acre and all industrially-zoned land with a final gross buildable land area of less than 0.5 acre has been classified as unbuildable. Sites of these sizes are incidental to the scope of examining the city's long term (20 year) land use needs.



**TABLE IV.4: JOSEPH: SUMMARY OF VACANT PARCELS WITHIN UGB & CITY LIMITS BY COMMERCIAL AND INDUSTRIAL ZONING DISTRICT**

Primary zone	Total		Vacant			Partially Vacant/ Redevelopable			Unbuildable	
	Parcels	Total Acres	Parcels	Total Acres	Buildable Acres	Parcels	Total Acres	Buildable Acres	Parcels	Total Unbuildable Acres
J-COM	102	22.57	7	3.17	2.45	1	0.67	0.27	9	2.29
J-M1	17	99.16	8	49.72	49.72	4	23.72	12.22		
M-1	1	0.18							1	0.18
<b>TOTAL</b>	<b>120</b>	<b>121.92</b>	<b>15</b>	<b>52.89</b>	<b>52.17</b>	<b>5</b>	<b>24.39</b>	<b>12.49</b>	<b>10</b>	<b>2.47</b>

1/ Commercial zoned parcels with final gross buildable acres less than 0.25 acre.

SOURCE: The Benkendorf Associates Corp.

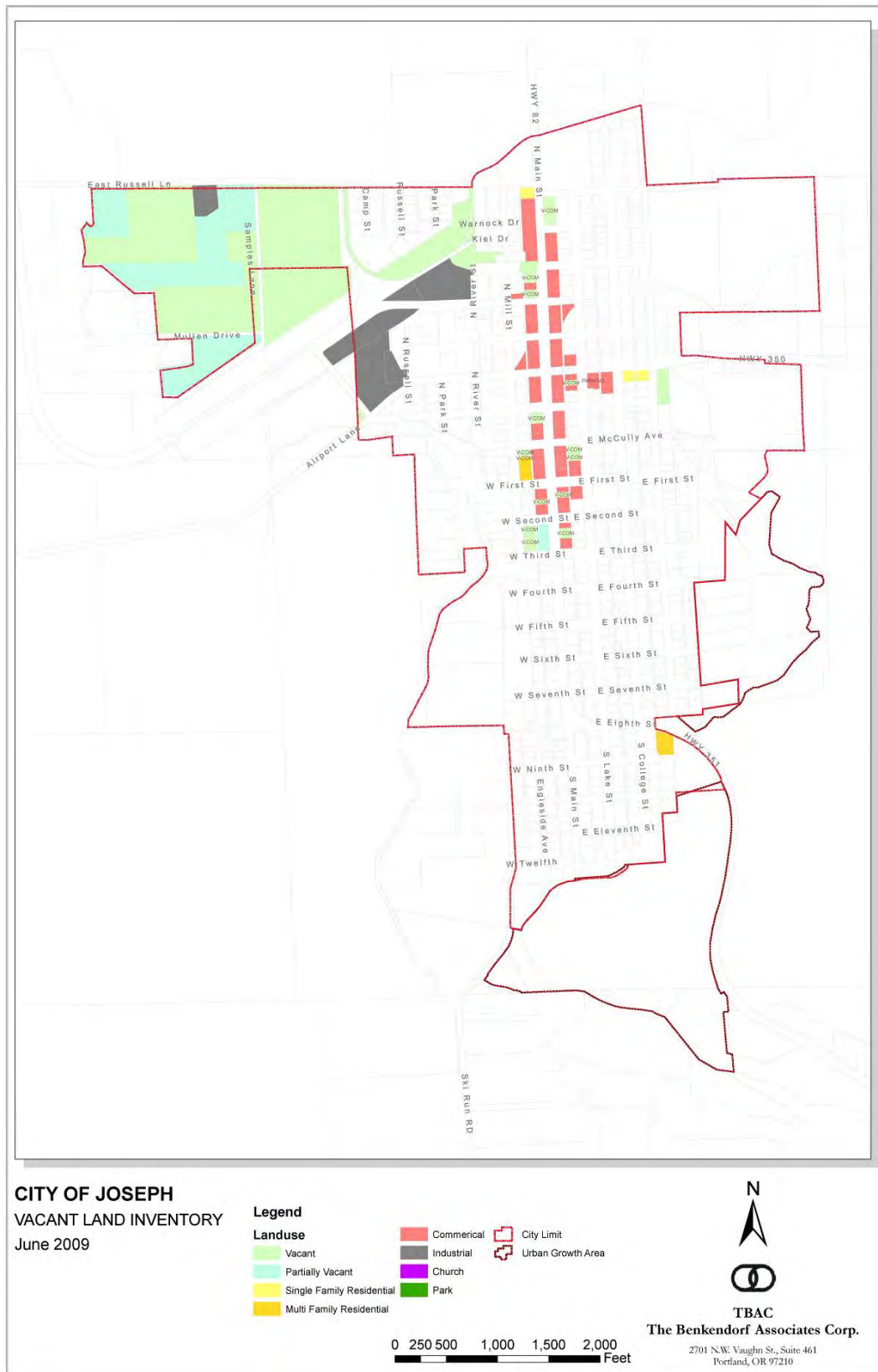
### Net Buildable Vacant Acres by Zoning District

Table IV.5 shows the inventory of all gross buildable vacant acres within the City of Joseph UGB and the conversion to the net buildable acres by deducting 25% of the parcel for infrastructure. As shown in the table, there are 2.04 net buildable commercial acres and 46.46 net buildable industrial acres, for a total of 48.5 net buildable acres.

**TABLE IV.5: JOSEPH INVENTORY OF NET BUILDABLE LAND BY ZONING DISTRICT**

Zone	Zone Code	Buildable parcels	Gross Buildable acres	Net Buildable acres
<b>Joseph UGB Limits</b>		<b>20</b>	<b>64.66</b>	<b>48.5</b>
<b>Commercial</b>		<b>8</b>	<b>2.72</b>	<b>2.04</b>
City of Joseph, Commercial	J-COM	8	2.72	2.04
<b>Industrial</b>		<b>12</b>	<b>61.94</b>	<b>46.46</b>
City of Joseph, Industrial	J-M1	12	61.94	46.46

SOURCE: The Benkendorf Associates Corp.





## WALLOWA COMMERCIAL AND INDUSTRIAL LAND SUPPLY

### Gross Buildable Vacant Acres by Zoning District

Table V.1 shows the land use zones in the City of Wallowa Zoning Ordinance.

**TABLE V.1: CITY OF WALLOWA ZONING DISTRICTS**

Zone	Code
<b>Commercial</b>	
City of Wallowa, Commercial	W-COM
City of Wallowa, Residential Commercial	W-RC
County of Wallowa, Commercial	W-C1
<b>Residential</b>	
City of Wallowa, Residential	W-RES
<b>Other</b>	
City of Wallowa, Urban Growth Area	W-UGR

SOURCE: City of Wallowa Zoning Code

Table V.2 lists the total acres and total parcels for each land use zone within the City limits and within the Urban Growth Boundary (UGB).

**TABLE V.2:: WALLOWA: LAND WITHIN THE CITY LIMITS AND UGB BY ZONING DISTRICT**

Zone	Total Acres	Total Parcels
W-COM	5.53	36
W-RC	97.58	213
W-RES	160.86	300
W-UGR	2.21	1
W-C1	39.12	5
<b>SUBTOTAL City</b>	<b>305.29</b>	<b>555</b>
W-C1	61.1	4
W-UGR	115.43	67
<b>SUBTOTAL UGB</b>	<b>176.53</b>	<b>71</b>
<b>TOTAL</b>	<b>481.82</b>	<b>626</b>

Table V.3 below contains an inventory of the gross buildable acreage of all parcels with commercial zoning (there is no industrial zoning) identified as vacant within the City limits and UGB. The parcels have been given two classifications:

- “Vacant” – 100% of the parcel has been identified as buildable;
- “Partially vacant” – parcels with some development on the site and with development potential on the vacant portion of the site.

The “unbuildable acres” column represents the area of the parcel that was identified as unbuildable for a variety of reasons, including: parcels committed to development, areas of partially vacant parcels dedicated to existing structures, and size.



The “unbuildable acres” column is subtracted from the “total acres” to determine the “final gross buildable acres” figure. As shown in Table V.3, a total of 108.65 gross acres of commercial land (no industrial land) in the City of Wallowa and its UGB is classified as vacant and buildable, out of a total of 55vacant parcels containing 131.31 acres.

A map showing all of the parcels listed in Table V.3 is shown at the end of this section.

**TABLE V.3: WALLOWA: INVENTORY OF VACANT PARCELS BY COMMERCIAL ZONING DISTRICT**

Parcel	Zone	Classification	Notes	Total Acres	Unbuildable Acres	Final Gross Buildable Acres
01N4214AB8300	W-COM	Vacant		0.08	0	0.08
01N4214AB9200	W-COM	Vacant		0.15	0	0.15
01N4214AC4400	W-COM	Vacant		0.08	0	0.08
01N421100600	W-RC	Vacant		5.98	0	5.98
01N421100602	W-RC	Vacant		1.37	0	1.37
01N4211CD1300	W-RC	Partially Vacant		0.23	0.13	0.1
01N4211CD1502	W-RC	Vacant		0.1	0	0.1
01N4211CD200	W-RC	Partially Vacant		0.79	0.35	0.44
01N4211CD2000	W-RC	Partially Vacant		0.67	0.24	0.43
01N4211CD2900	W-RC	Vacant		2.07	0	2.07
01N4211CD3000	W-RC	Vacant		0.83	0	0.83
01N4211CD3201	W-RC	Partially Vacant		1.13	0.3	0.83
01N4211CD401	W-RC	Vacant		0.22	0	0.22
01N4211DC300	W-RC	Vacant		0.29	0	0.29
01N4211DC400	W-RC	Vacant		0.3	0	0.3
01N4211DC401	W-RC	Vacant		0.31	0	0.31
01N4211DC700	W-RC	Vacant		0.42	0	0.42
01N4211DC800	W-RC	Partially Vacant		1.66	1.17	0.49
01N4214AA1800	W-RC	Vacant		0.16	0	0.16
01N4214AA1900	W-RC	Vacant		0.1	0	0.1
01N4214AA2001	W-RC	Partially Vacant		0.39	0.19	0.2
01N4214AA2002	W-RC	Vacant		0.34	0	0.34
01N4214AA2100	W-RC	Vacant		0.3	0	0.3
01N4214AA390	W-RC	Vacant		2.05	0	2.05
01N4214AA401	W-RC	Partially Vacant		1.55	0.5	1.05
01N4214AA800	W-RC	Partially Vacant		1.69	0.85	0.84
01N4214AB1900	W-RC	Vacant		0.15	0	0.15
01N4214AB1901	W-RC	Vacant		0.15	0	0.15
01N4214AB7000	W-RC	Vacant		0.19	0	0.19
01N4214AB9500	W-RC	Vacant		0.23	0	0.23
01N4214AB9900	W-RC	Vacant		0.23	0	0.23
01N4214AD3400	W-RC	Vacant		1	0	1
01N4214AD3500	W-RC	Partially Vacant		1.03	0.35	0.68
01N4214AD4701	W-RC	Vacant		0.14	0	0.14
01N4214AD5000	W-RC	Vacant		0.57	0	0.57
01N4214AD5001	W-RC	Vacant		0.49	0	0.49
01N4214BA2000	W-RC	Partially Vacant		0.51	0.15	0.36
01N4214BA2400	W-RC	Partially Vacant		0.88	0.28	0.6
01N4214BA3000	W-RC	Vacant		0.05	0	0.05
01N4214BA3100	W-RC	Partially Vacant		0.51	0.3	0.21
01N4214BA6600	W-RC	Vacant		0.35	0	0.35
01N4214BA6900	W-RC	Partially Vacant		0.4	0.2	0.2
01N4214BA7100	W-RC	Vacant		0.2	0	0.2
01N4214BA7200	W-RC	Partially Vacant		0.3	0.15	0.15





Parcel	Zone	Classification	Notes	Total Acres	Unbuildable Acres	Final Gross Buildable Acres
01N4214BD100	W-RC	Vacant		0.07	0	0.07
01N4214BD1200	W-RC	Vacant		0.1	0	0.1
01N4214BD1300	W-RC	Vacant		0.25	0	0.25
01N4214AA2300	W-C1	Vacant		1.43	0	1.43
01N421100200	W-C1	Vacant	water reservoir	17.5	17.5	0
01N421100300	W-C1	Vacant		0.84	0	0.84
01N421100400	W-C1	Vacant		5.39	0	5.39
01N421100500	W-C1	Vacant		2.97	0	2.97
01N421100501	W-C1	Vacant		13.97	0	13.97
01N421100100	W-C1	Vacant		54.42	0	54.42
01N4211BC500	W-C1	Vacant		1.01	0	1.01
<b>TOTAL</b>				<b>131.31</b>	<b>22.66</b>	<b>108.65</b>

SOURCE: The Benkendorf Associates Corp.

Table V.4 below shows a summary of the data in Table V.3 by zoning district. All commercially-zoned land with a final gross buildable land area of less than 0.25 acre has been classified as unbuildable. Sites of these sizes are incidental to the scope of examining the city's long term (20 year) land use needs.

**TABLE V.4: WALLOWA: SUMMARY OF VACANT PARCELS WITHIN UGB & CITY BY COMMERCIAL ZONING DISTRICT**

Primary zone	Total		Vacant			Partially Vacant/ Redevelopable			Unbuildable 1/	
	Parcels	Total Acres	Parcels	Total Acres	Buildable Acres	Parcels	Total Acres	Buildable Acres	Parcels	Total Unbuildable Acres
W-COM	36	5.53							3	0.3
W-RC	213	97.58	16	16.93	16.93	9	9.91	5.72	19	2.96
W-C1	9	100.22	8	82.73	82.73				1	17.5
<b>TOTAL</b>	<b>625</b>	<b>479.62</b>	<b>24</b>	<b>99.66</b>	<b>99.66</b>	<b>9</b>	<b>9.91</b>	<b>5.72</b>	<b>23</b>	<b>20.76</b>

1/ Commercial zoned parcels with final gross buildable acres less than 0.25 acre.

SOURCE: The Benkendorf Associates Corp.

### Net Buildable Vacant Acres by Zoning District

Table V.5 shows the inventory of all gross buildable vacant acres within the City of Wallowa UGB and the conversion to the net buildable acres by deducting 25% of the parcel for infrastructure. As shown in the table, there are 58.67 net buildable commercial acres.

**TABLE V.5: WALLOWA: INVENTORY OF NET BUILDABLE LAND BY COMMERCIAL ZONING DISTRICT**

Zone	Zone Code	Buildable parcels	Gross Buildable acres	Net Buildable acres
<b>Wallowa UGB Limits</b>		<b>33</b>	<b>105.39</b>	<b>79.04</b>
City of Wallowa, Commercial	W-COM.	25	22.66	16.99
County of Wallowa, Commercial	W-C1	8	82.73	62.05

SOURCE: The Benkendorf Associates Corp.





## LOSTINE COMMERCIAL AND INDUSTRIAL LAND SUPPLY

### Gross Buildable Vacant Acres by Zoning District

Table III.1 shows the land use zones in the City of Lostine Zoning Ordinance.

**TABLE VI.1: CITY OF LOSTINE ZONING DISTRICTS**

<b>Zone</b>	<b>Code</b>
<b>Commercial</b>	
City of Lostine, Commercial	L-COM
City of Lostine, Heavy Commercial	E/C-2
<b>Residential</b>	
City of Lostine, Residential	L-RES
City of Lostine, Residential Multiple	L-RM

SOURCE: City of Lostine Zoning Code

Table VI.2 lists the total acres and total parcels for each land use zone within the City limits and within the Urban Growth Boundary (UGB).

**TABLE VI.2: LOSTINE: LAND WITHIN THE CITY LIMITS AND UGB BY ZONING DISTRICT.**

<b>Zone</b>	<b>Total Acres</b>	<b>Total Parcels</b>
L-COM	8.87	38
L-RES	67.55	108
L-RM	16.38	7
<b>SUBTOTAL City</b>	<b>92.8</b>	<b>153</b>
L-RES	37.6	12
<b>SUBTOTAL UGB</b>	<b>37.6</b>	<b>12</b>
<b>TOTAL</b>	<b>130.39</b>	<b>165</b>

SOURCE: The Benkendorf Associates Corp.

Table VI.3 below contains an inventory of the gross buildable acreage of all parcels with commercial zoning (there is no industrial zoning) identified as vacant within the City limits and UGB. The parcels have been given two classifications:

- “Vacant” – 100% of the parcel has been identified as buildable;
- “Partially vacant” – parcels with some development on the site and with development potential on the vacant portion of the site.

The “unbuildable acres” column represents the area of the parcel that was identified as unbuildable for a variety of reasons, including: parcels committed to development, areas of partially vacant parcels dedicated to existing structures, and size.



The “unbuildable acres” column is subtracted from the “total acres” to determine the “final gross buildable acres” figure. As shown in Table VI.3, a total of 0.79 gross acres of commercial land (no industrial land) in the City of Lostine and its UGB is classified as vacant and buildable, out of a total of 5 vacant parcels containing 1.07 acres.

A map showing all of the parcels listed in Table VI.3 is shown at the end of this section.

**TABLE VI.3: INVENTORY OF VACANT PARCELS BY COMMERCIAL ZONING DISTRICT**

Parcel	Zone	Classification	Notes	Total Acres	Unbuildable Acres	Final Gross Buildable Acres
01S4310CD1100	L-COM	Vacant		0.33	0	0.33
01S4310CD3500	L-COM	Vacant		0.08	0	0.08
01S4310CD3600	L-COM	Partially Vacant		0.33	0.12	0.21
01S4310CD3800	L-COM	Vacant		0.08	0	0.08
01S4310CD3900	L-COM	Partially Vacant		0.25	0.16	0.09
<b>TOTAL</b>				<b>1.07</b>	<b>0.28</b>	<b>0.79</b>

SOURCE: The Benkendorf Associates Corp.

Table VI.4 below shows a summary of the data in Table VI.3 by zoning district. All commercially-zoned land with a final gross buildable land area of less than 0.25 acre has been classified as unbuildable. Sites of these sizes are incidental to the scope of examining the city’s long term (20 year) land use needs.

**TABLE VI.4: LOSTINE: SUMMARY OF VACANT PARCELS WITHIN UGB & CITY BY COMMERCIAL ZONING DISTRICT**

Primary zone	Total		Vacant			Partially Vacant/ Redevelopable			Unbuildable 1/	
	Parcels	Total Acres	Parcels	Total Acres	Buildable Acres	Parcels	Total Acres	Buildable Acres	Parcels	Total Unbuildable Acres
L-COM	38	8.87	1	0.33	0.33				4	0.46
<b>TOTAL</b>	<b>38</b>	<b>8.87</b>	<b>1</b>	<b>0.33</b>	<b>0.33</b>				<b>4</b>	<b>0.46</b>

1/ Commercial zoned parcels with final gross buildable acres less than 0.25 acre.

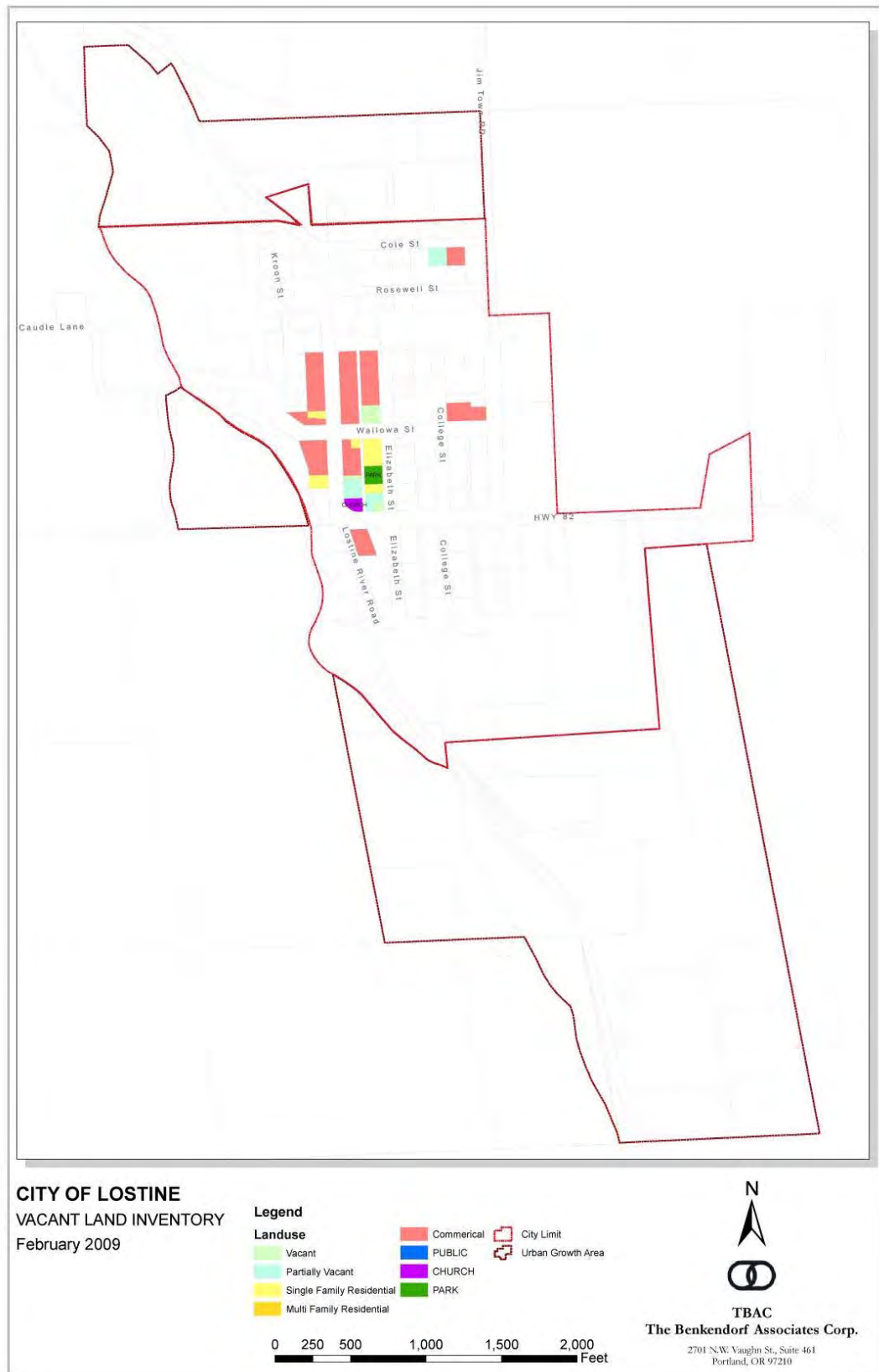
### Net Buildable Vacant Acres by Zoning District

Table VI.5 shows the inventory of all gross buildable vacant acres and the conversion to the net buildable acres by deducting 25% of the parcel for infrastructure with the City of Lostine UGB. As shown in the table, there are 0.25 net buildable commercial acres.

**TABLE VI.5: LOSTINE: INVENTORY OF NET BUILDABLE LAND BY COMMERCIAL ZONING DISTRICT**

Zone	Zone Code	Buildable parcels	Gross Buildable acres	Net Buildable acres
<b>Lostine UGB Limits</b>		<b>1</b>	<b>0.33</b>	<b>0.25</b>
City of Lostine, Commercial	L-COM	1	0.33	0.25

SOURCE: The Benkendorf Associates Corp.





## 20-YEAR SUPPLY/DEMAND RECONCILIATION

### RECONCILIATION OF LAND DEMAND & SUPPLY

The final step in establishing the Wallowa County's land demand projections is to arrive at a reconciliation of projected land demand and the existing buildable land base. This analysis will identify land surplus' and deficits within each urban area and by Land Use type. It is important to highlight here that the City of Joseph is the only urban area in the County with an Industrial Land Use designation. Also, there is no clearly identified land use zone for specialized use in which vacant land has been inventoried. In communities the size of Wallowa County's urban areas, specialized uses tend to locate on Industrial parcels as development is rarely able to pencil on prime commercial land.

The tables below provide detailed assessment of Wallowa County's employment land demand and reconciled need by urban area and land use through 2028. Results are expressed for all three employment growth scenarios and directly correlate to employment land demand details provided in FIGURE 31.

CITY OF ENTERPRISE		20-Year Land Need (Acres)					
Land Use Type	Demand Scenario			Vacant Supply	Land Deficit/Surplus		
	Baseline	Medium	High		Baseline	Medium	High
<b>Commercial Land:</b>	<b>21.0</b>	<b>23.5</b>	<b>26.8</b>	<b>58.7</b>	<b>37.6</b>	<b>35.2</b>	<b>31.9</b>
<i>From Office Support:</i>	6.0	6.8	8.6	-	-	-	-
<i>From Retail Support:</i>	15.0	16.7	18.2	-	-	-	-
<b>Industrial Land:</b>	<b>5.3</b>	<b>6.5</b>	<b>7.4</b>	<b>0.0</b>	<b>(5.3)</b>	<b>(6.5)</b>	<b>(7.4)</b>
<b>Specialized Uses:</b>	<b>6.3</b>	<b>6.4</b>	<b>9.4</b>	<b>N/A</b>	<b>(6.3)</b>	<b>(6.4)</b>	<b>(9.4)</b>
<b>TOTAL LAND NEED:</b>	<b>32.6</b>	<b>36.4</b>	<b>43.6</b>	<b>58.7</b>	<b>26.0</b>	<b>22.2</b>	<b>15.1</b>

- The City of Enterprise does not have an industrial zone, therefore, the City is deficient in industrial land in the vicinity of 5.3 to 7.3 acres. This need cannot be met by the City's Heavy Commercial designated land (3.3 acres). This need may be met by the establishment of an industrial zone and changes in zoning designations within the UGB.
- The City has a 20-year need for roughly 6.3 to 9.4 acres of specialized use land. This is largely the result of long-term potential uses related to Education & Health employment growth. Commercially designated lands proximate to the hospital are best suited to meet this need.
- The City has a surplus of commercial land in the vicinity of 37.6 to 31.9 acres. The City's commercial land is well suited to meet the needs of emerging industries, with an ample supply of land proximate to the hospital. Moreover, the City's Commercial View lands are suitable for professional services/office development.
- Combined, the City of Enterprise has a net surplus of 15.3 to 26.0 acres of land, contingent on its realized growth pattern.



CITY OF JOSEPH		20-Year Land Need (Acres)						
Land Use Type	Demand Scenario			Vacant Supply	Land Deficit/Surplus			
	Baseline	Medium	High		Baseline	Medium	High	
<b>Commercial Land:</b>	<b>17.9</b>	<b>20.9</b>	<b>22.9</b>	<b>2.0</b>	<b>(15.8)</b>	<b>(18.8)</b>	<b>(20.8)</b>	
<i>From Office Support:</i>	1.5	1.8	2.0	-	-	-	-	
<i>From Retail Support:</i>	16.4	19.1	20.9	-	-	-	-	
<b>Industrial Land:</b>	<b>1.0</b>	<b>3.9</b>	<b>5.6</b>	<b>46.5</b>	<b>45.4</b>	<b>42.6</b>	<b>40.8</b>	
<b>Specialized Uses:</b>	<b>0.7</b>	<b>0.8</b>	<b>0.9</b>	<b>N/A</b>	<b>(0.7)</b>	<b>(0.8)</b>	<b>(0.9)</b>	
<b>TOTAL LAND NEED:</b>	<b>19.6</b>	<b>25.5</b>	<b>29.4</b>	<b>48.5</b>	<b>28.9</b>	<b>23.0</b>	<b>19.1</b>	

- The City of Joseph is the Only Jurisdiction with and Industrial land zone, having roughly 46.5 acres of industrial land within the UGB. However, aside from some smaller scale niche manufacturing or expansion of the foundry industry, industrial growth is not central to the City's targeted industries. Regardless of growth scenario, the City of Joseph has a significant surplus of industrial land.
- From its tourism based economy, the largest growth segment for Joseph will likely be commercial need. With only 2.0 acres of developable commercial land, the city has a deficit of 15.8 to 20.8 acres of commercial land over the planning period.
- Combined, the City of Joseph has a net surplus of 22.7 to 28.9 acres of land, contingent on its realized growth pattern.

CITY OF LOSTINE		20-Year Land Need (Acres)						
Land Use Type	Demand Scenario			Vacant Supply	Land Deficit/Surplus			
	Baseline	Medium	High		Baseline	Medium	High	
<b>Commercial Land:</b>	<b>3.0</b>	<b>3.3</b>	<b>3.6</b>	<b>0.3</b>	<b>(2.8)</b>	<b>(3.1)</b>	<b>(3.4)</b>	
<i>From Office Support:</i>	0.3	0.4	0.4	-	-	-	-	
<i>From Retail Support:</i>	2.7	2.9	3.2	-	-	-	-	
<b>Industrial Land:</b>	<b>0.6</b>	<b>0.8</b>	<b>0.9</b>	<b>0.0</b>	<b>(0.6)</b>	<b>(0.8)</b>	<b>(0.9)</b>	
<b>Specialized Uses:</b>	<b>0.2</b>	<b>0.2</b>	<b>0.2</b>	<b>N/A</b>	<b>(0.2)</b>	<b>(0.2)</b>	<b>(0.2)</b>	
<b>TOTAL LAND NEED:</b>	<b>3.8</b>	<b>4.3</b>	<b>4.7</b>	<b>0.3</b>	<b>(3.6)</b>	<b>(4.1)</b>	<b>(4.5)</b>	

- With the exception of one 0.25 acre commercial parcel, the City of Lostine does not have any developable employment lands within its UGB.
- Combined, the City of Lostine has a net deficit of 3.6 to 4.5 acres of land, contingent on its realized growth pattern.

CITY OF WALLOWA		20-Year Land Need (Acres)						
Land Use Type	Demand Scenario			Vacant Supply	Land Deficit/Surplus			
	Baseline	Medium	High		Baseline	Medium	High	
<b>Commercial Land:</b>	<b>6.2</b>	<b>6.8</b>	<b>7.3</b>	<b>79.0</b>	<b>72.9</b>	<b>72.3</b>	<b>71.7</b>	
<i>From Office Support:</i>	0.6	0.7	0.8	-	-	-	-	
<i>From Retail Support:</i>	5.5	6.0	6.5	-	-	-	-	
<b>Industrial Land:</b>	<b>0.6</b>	<b>2.1</b>	<b>3.0</b>	<b>0.0</b>	<b>(0.6)</b>	<b>(2.1)</b>	<b>(3.0)</b>	
<b>Specialized Uses:</b>	<b>0.8</b>	<b>0.9</b>	<b>1.0</b>	<b>N/A</b>	<b>(0.8)</b>	<b>(0.9)</b>	<b>(1.0)</b>	
<b>TOTAL LAND NEED:</b>	<b>7.6</b>	<b>9.8</b>	<b>11.4</b>	<b>79.0</b>	<b>71.4</b>	<b>69.2</b>	<b>67.7</b>	

- Of all the jurisdictions in Wallowa County, The City of Wallowa has the largest inventory of developable employment lands, roughly 79 acres of Commercial Land. Additionally, industrial





development is considered a conditional use on Commercial lands. Wallowa has the largest vacant site in the County at just over 54 acres.

- Combined, Wallowa's land supply is sufficient to accommodate anticipated growth over the 20-year planning period regardless of forecast scenario.



## GOALS AND POLICIES

---

### CITY OF ENTERPRISE

#### GOALS

**GOAL 1:** To provide sufficient lands for diversification and improvement of the City's economy. *[Source: existing goal, edited to focus on economic development goals only]*

#### POLICIES

*Note existing Policies 12-8 through 12-21 concerning residential development/housing (Policies 12-8 through 12-10), and the UGB and the location of development within the urban growth areas (Policies 12-11 through 12-21) are outside of the scope of the Goal 9 Economy chapter and are more appropriately located in the Goal 10 Housing and Goal 14 Urbanization sections of the Comprehensive Plan.*

**Policy 1:** The City shall focus its economic development efforts on the following industry clusters: professional services, financial services, health and medical services, value-added agriculture and wood products manufacturing, and education. *[Source: new policy]*

**Policy 2:** The City shall encourage industrial expansion in a manner which will not seriously degrade the local, social, economic and natural environments. *[Source: Policy 12-7; edited]*

**Policy 3:** The City shall encourage suitable industrial development which can be expected to:

- *Increase year round employment.*
- *Employ the available local labor force.*
- *Process currently underutilized resources, such as wood and wood by-products.*
- *Serve County consumer needs and produce products for export.*
- *Develop and build where adequate public facilities and services are available (including adequate sewer, water, roads, fire protection, railroad).*
- *Increase the economic base and tax base.*
- *Supplement and protect the valuable natural resource-based economy. [Source: Policy 12-4; edited]*

**Policy 4:** The City shall work closely with Wallowa County in promoting economic development in accordance with the overall economic development plan for the county. *[Source: Policy 12-6; edited]*

**Policy 5:** The City shall coordinate with educational institutions in order to position the city and region as a center for technical training and education. *[Source: new policy]*

**Policy 6:** The City shall encourage the development of high speed internet connectivity and access in order to strengthen its competitive advantage in attracting new industries, businesses and people. *[Source: new policy]*



**Policy 7:** The City shall encourage greater retail diversity. *[Source: new policy]*

**Policy 8:** The City shall evaluate the opportunities for a Main Street program to better define and enhance commerce in the city's downtown. *[Source: new policy]*

**Policy 9:** The City shall evaluate the establishment of a "Wallowa County Brand Center," a centralized physical store/location for businesses to market their branded products and services. *[Source: new policy]*

**Policy 10:** In order to expand its manufacturing base, the City shall encourage value-added production for food processing & wood products manufacturing. *[Source: new policy]*

**Policy 11:** The City shall work with other partners to secure grant funding for the establishment of an interpretive center in its downtown. *[Source: new policy]*

**Policy 12:** The City shall work together with Wallowa County to expand the tourist and recreation season to include winter sports and recreation. *[Source: "Recommendation" 12-3; edited]*

**Policy 13:** The City shall identify and zone sufficient developable land for commercial and industrial use to meet its projected growth needs for the next twenty years. *[Source: Policy 12-5; edited]*

**Policy 14:** The City shall establish an Industrial land use designation and zoning district and provide for sufficient land within its UGB for projected industrial land needs *[Source: new policy]*

**Policy 15:** The City shall designate commercial areas so that they are concentrated and consolidated to about the existing core commercial area and so that commercial expansion generally takes place along North First Street (Highway 3), North Street, and South River Street (Highway 82). *[Source: Policy 12-1; edited]*

**Policy 16:** The City shall encourage light industrial development primarily in the southern and northwestern portions of the city away from residential areas. *[Source: Policy 12-2; edited]*

**Policy 17:** The City shall encourage future commercial and industrial growth to remove dilapidated housing in these land use classification areas. *[Source: Policy 12-3; edited]*

**Policy 18:** The City shall work with the County to identify industrial sites that should have a priority for urban services and to update the City and County Plans to provide protection for these industrial sites. *[Source: "Recommendation" 12-1; edited].*

**Policy 19:** The City shall work with the Overall Economic Development Committee to update the OEDP for the County and City. *[Source: "Recommendation" 12-2; edited]*



## CITY OF JOSEPH

### GOALS

**GOAL 1:** To diversify and strengthen the mix of economic activity in the City of Joseph and the surrounding region. *[Source: new]*

**GOAL 2:** To recognize and promote the arts, recreation and tourism as an important component of the overall economy. *[Source: new]*

**GOAL 3:** To retain the natural resource production chain in the area. *[Source: new]*

### POLICIES

**Policy 1:** The City shall focus its economic development efforts on the following industry clusters: retail trade, manufacturing, and leisure and hospitality. *[Source: new policy]*

**Policy 2:** The City shall continue to take advantage of its locational amenities that make it the tourism and arts hub of the region. *[Source: new policy]*

**Policy 3:** The City shall make a priority of the preservation of existing industries and establishments in and near Joseph. *[Source: Policy 4; edited]*

**Policy 4:** The City shall encourage the diversification and expansion of its arts, culture, recreation, and tourism industry. This could include supporting the establishment of niche outdoor recreational manufacturing companies. *[Source: new policy]*

**Policy 5:** The City shall work with other partners to investigate the possibility of grant funding for the establishment of an interpretive center located on Joseph's main street to highlight the cultural and artistic significance and assets of the community. *[Source: new policy]*

**Policy 6:** The City shall consider social and economic factors in addition to environmental effects when making planning and economic development decisions. *[Source: Policy 1; edited]*

**Policy 7:** In order to expand its manufacturing base, the City shall encourage value-added production for food processing & wood products manufacturing. *[Source: new policy]*

**Policy 8:** The City shall provide for sufficient land within its UGB for projected commercial and industrial land needs *[Source: new policy]*

**Policy 9:** The City shall encourage development of a major resort or tourist facility on the outskirts of the City (i.e., convention center). *[Source: Policy 3; edited]*



**Policy 10:** The City shall study the feasibility of establishing a special zone in the northwest area to allow subdivisions with 2 to 3 acre lot sizes for hybrid residential/industrial uses that would target home-based small-scale low-impact manufacturing uses. *[Source: new policy]*

**Policy 11:** The City shall encourage all new and existing businesses to meet the following design specifications for the exterior of their buildings in an attempt to lure new businesses and create a better economy:

- *Wood or masonry type construction. If wood, preferably stained in neutral color. Visibility of metal siding and roofing in the commercial zone shall be discouraged.*
- *Re-siding of existing brick or stone buildings shall be discouraged.*
- *Business signs shall be made of wood where at all possible and preferably attached directly to the building.*
- *In general, a Western motif shall be considered desirable [Source: Policy 2; edited]*

## CITY OF WALLOWA

### GOALS

**GOAL 1:** To diversify and improve the economy and employment base of the City *[Source: existing]*

### POLICIES

**Policy 1:** The City shall take advantage of its favorable location and land supply, and shall focus its economic development efforts on the following industry clusters: manufacturing, and transportation, warehousing and utilities. *[Source: new policy]*

**Policy 2:** The City shall encourage and support development of an industrial park where compatible with other uses. *[Source: Policy 9-1; edited]*

**Policy 3:** The City shall coordinate with all State and Federal agency plans affecting the local economy and coordinated with local needs. *[Source: Policy 9-2; edited]*

**Policy 4:** The City shall expedite permit procedures for economic development where compatible with other uses and values. *[Source: Policy 9-3; edited]*

**Policy 5:** The City shall encourage and plan for the diversification of home-based industries. *[Source: Policy 9-4; edited]*

**Policy 6:** The City shall use the Overall Economic Development Program for Wallowa County as the base for local economic development programs. *[Source: Policy 9-5; edited]*

**Policy 7:** The City shall encourage industrial expansion in a manner that will not seriously degrade the local area's livability. *[Source: Policy 9-6; edited]*



**Policy 8:** The City shall plan and make available public facilities and services to those locations deemed suitable for industrial uses when the need arises. *[Source: Policy 9-7; edited]*

**Program 9:** The City shall coordinate and cooperate in a joint private-public effort to attract timber processing or related industries to the area. The program should take into account tax incentives, ordinance and improvements needs, and fee and less-than-fee acquisition techniques. *[Source: "Recommendation" 9-1; edited]*

**Program 10:** The City shall encourage efforts to expand the duration of the local seasonal employment period. *[Source: "Recommendation" 9-2; edited]*

**Program 11:** The City shall encourage new retail businesses in order to provide a better local selection of goods. *[Source: "Recommendation" 9-3; edited]*

## CITY OF LOSTINE

### GOALS

**GOAL 1:** To maintain or enhance economic stability without diminishing the livability of the area *[Source: Objective 2 from the Land Use Plan; edited]*

**GOAL 2:** To provide for community employment needs within the financial and natural limitations of the area. *[Source: Objective 4 from the Land Use Plan; edited]*

### POLICIES

**Policy 1:** The City shall encourage employment opportunities that are compatible with exiting and anticipated uses. *[Source: Section E. Socio-Economic Policy 1 from the Land Use Plan; edited]*

**Policy 2:** The City shall evaluate the suitability of proposed employment land uses according, but not limited to, the following factors: availability of labor force and materials, market locations, transportation and service needs, relationship to present economic base, and similar considerations. *[Source: Section E. Socio-Economic Policy 2 from the Land Use Plan; edited]*

**Policy 3:** The City shall consider social and economic factors in addition to environmental effects when making planning decisions. *[Source: Section E. Socio-Economic Policy 3 from the Land Use Plan; edited]*

**Policy 4:** The City shall provide for sufficient land within its UGB for projected employment land needs *[Source: new policy]*



## TECHNICAL APPENDIX A: DETAILED LAND NEED TABLES

---



**EXHIBIT 1.1**  
**COMMERCIAL OFFICE SPACE DEMAND**  
**WALLOWA COUNTY URBAN AREAS (2008-2028)**

COMMERCIAL OFFICE	Base Year	Office Space Utilizing Employment				Avg. Space	Commercial Office Space Demand 2/					'08-'28
	2008	2013	2018	2023	2028	Per Job 1/	2008	2013	2018	2023	2028	Change
<b><u>Baseline Growth Scenario</u></b>												
Enterprise	716	766	821	880	945	366	288,249	308,461	330,447	354,387	380,486	92,237
Joseph	207	220	234	249	264	366	83,536	88,688	94,199	100,095	106,406	22,870
Lostine	49	52	55	59	62	366	19,779	20,950	22,216	23,586	25,067	5,289
Wallowa	67	72	77	83	90	366	26,781	28,851	31,117	33,598	36,318	9,537
<b>Total</b>	<b>1,039</b>	<b>1,110</b>	<b>1,187</b>	<b>1,271</b>	<b>1,362</b>	<b>366</b>	<b>418,344</b>	<b>446,951</b>	<b>477,979</b>	<b>511,665</b>	<b>548,277</b>	<b>129,933</b>
<b><u>Medium Growth Scenario</u></b>												
Enterprise	716	772	833	901	974	366	288,249	310,848	335,550	362,575	392,167	103,918
Joseph	207	222	239	256	275	366	83,536	89,537	96,022	103,035	110,624	27,089
Lostine	49	52	56	60	64	366	19,779	21,077	22,491	24,032	25,712	5,933
Wallowa	67	72	79	86	94	366	26,781	29,177	31,826	34,760	38,011	11,231
<b>Total</b>	<b>1,039</b>	<b>1,119</b>	<b>1,207</b>	<b>1,303</b>	<b>1,407</b>	<b>366</b>	<b>418,344</b>	<b>450,639</b>	<b>485,890</b>	<b>524,402</b>	<b>566,515</b>	<b>148,171</b>
<b><u>Accelerated Growth Forecast</u></b>												
Enterprise	716	784	860	946	1,043	366	288,249	315,520	346,176	380,720	419,741	131,492
Joseph	207	224	242	262	283	366	83,536	90,176	97,417	105,320	113,954	30,419
Lostine	49	53	57	61	65	366	19,779	21,201	22,762	24,475	26,359	6,581
Wallowa	67	73	81	89	98	366	26,781	29,442	32,420	35,757	39,504	12,724
<b>Total</b>	<b>1,039</b>	<b>1,133</b>	<b>1,239</b>	<b>1,357</b>	<b>1,489</b>	<b>366</b>	<b>418,344</b>	<b>456,339</b>	<b>498,774</b>	<b>546,273</b>	<b>599,559</b>	<b>181,215</b>

1/ Average office employment density by industry sector based on Urban Land Institute guidelines.

2/ Assumes a market-clearing 10% office space vacancy rate.

**EXHIBIT 1.2**  
**COMMERCIAL OFFICE LAND DEMAND**  
**WALLOWA COUNTY URBAN AREAS (2008-2028)**

COMMERCIAL OFFICE	Base Year	Commercial Office Space Demand					Avg.	Commercial Office Land Demand					'08-'28
	2008	2013	2018	2023	2028	F.A.R. 1/		2008	2013	2018	2023	2028	Change
<b><u>Baseline Growth Scenario</u></b>													
Enterprise	288,249	308,461	330,447	354,387	380,486	0.35		18.9	20.2	21.7	23.2	25.0	6.0
Joseph	83,536	88,688	94,199	100,095	106,406	0.35		5.5	5.8	6.2	6.6	7.0	1.5
Lostine	19,779	20,950	22,216	23,586	25,067	0.35		1.3	1.4	1.5	1.5	1.6	0.3
Wallowa	26,781	28,851	31,117	33,598	36,318	0.35		1.8	1.9	2.0	2.2	2.4	0.6
<b>Total</b>	<b>418,344</b>	<b>446,951</b>	<b>477,979</b>	<b>511,665</b>	<b>548,277</b>	<b>0.35</b>		<b>27.4</b>	<b>29.3</b>	<b>31.4</b>	<b>33.6</b>	<b>36.0</b>	<b>8.5</b>
<b><u>Medium Growth Scenario</u></b>													
Enterprise	288,249	310,848	335,550	362,575	392,167	0.35		18.9	20.4	22.0	23.8	25.7	6.8
Joseph	83,536	89,537	96,022	103,035	110,624	0.35		5.5	5.9	6.3	6.8	7.3	1.8
Lostine	19,779	21,077	22,491	24,032	25,712	0.35		1.3	1.4	1.5	1.6	1.7	0.4
Wallowa	26,781	29,177	31,826	34,760	38,011	0.35		1.8	1.9	2.1	2.3	2.5	0.7
<b>Total</b>	<b>418,344</b>	<b>450,639</b>	<b>485,890</b>	<b>524,402</b>	<b>566,515</b>	<b>0.35</b>		<b>27.4</b>	<b>29.6</b>	<b>31.9</b>	<b>34.4</b>	<b>37.2</b>	<b>9.7</b>
<b><u>Accelerated Growth Forecast</u></b>													
Enterprise	288,249	315,520	346,176	380,720	419,741	0.35		18.9	20.7	22.7	25.0	27.5	8.6
Joseph	83,536	90,176	97,417	105,320	113,954	0.35		5.5	5.9	6.4	6.9	7.5	2.0
Lostine	19,779	21,201	22,762	24,475	26,359	0.35		1.3	1.4	1.5	1.6	1.7	0.4
Wallowa	26,781	29,442	32,420	35,757	39,504	0.35		1.8	1.9	2.1	2.3	2.6	0.8
<b>Total</b>	<b>418,344</b>	<b>456,339</b>	<b>498,774</b>	<b>546,273</b>	<b>599,559</b>	<b>0.35</b>		<b>27.4</b>	<b>29.9</b>	<b>32.7</b>	<b>35.8</b>	<b>39.3</b>	<b>11.9</b>

1/ Floor Area Ratio assumes typical suburban office development form.

**EXHIBIT 1.3**  
**INDUSTRIAL SPACE DEMAND**  
**WALLOWA COUNTY URBAN AREAS (2008-2028)**

INDUSTRIAL	Base Year	Industrial Utilizing Employment				Avg. Space	Industrial Space Demand 2/					'08-'28
	2008	2013	2018	2023	2028	Per Job 1/	2008	2013	2018	2023	2028	Change
Baseline Growth Scenario												
Enterprise	309	322	336	351	367	1,183	401,583	419,094	437,650	457,314	478,150	76,568
Joseph	117	119	122	125	128	1,183	151,851	155,223	158,818	162,645	166,719	14,868
Lostine	61	62	64	66	68	1,183	78,823	80,949	83,201	85,587	88,116	9,293
Wallowa	51	52	54	56	58	1,183	65,958	68,062	70,300	72,682	75,214	9,256
Total	537	556	576	598	621	1,183	698,214	723,328	749,969	778,228	808,200	109,986
Medium Growth Scenario												
Enterprise	309	325	343	361	381	1,183	401,583	423,009	445,769	469,953	495,658	94,075
Joseph	117	126	136	147	160	1,183	151,851	163,809	176,998	191,556	207,642	55,791
Lostine	61	63	65	67	70	1,183	78,823	81,529	84,390	87,415	90,615	11,793
Wallowa	51	56	61	67	74	1,183	65,958	72,271	79,382	87,406	96,480	30,522
Total	537	569	604	643	684	1,183	698,214	740,619	786,538	836,330	890,395	192,182
Accelerated Growth Forecast												
Enterprise	309	327	347	367	390	1,183	401,583	425,449	450,947	478,197	507,332	105,749
Joseph	117	129	143	160	179	1,183	151,851	168,068	186,663	208,034	232,648	80,797
Lostine	61	63	65	68	71	1,183	78,823	81,858	85,083	88,511	92,157	13,334
Wallowa	51	57	65	73	84	1,183	65,958	74,218	83,944	95,447	109,109	43,151
Total	537	576	620	669	723	1,183	698,214	749,593	806,637	870,189	941,246	243,032

1/ Average office employment density by industry sector based on Urban Land Institute guidelines.

2/ Assumes a market-clearing 10% office space vacancy rate.

**EXHIBIT 1.4**  
**COMMERCIAL OFFICE SPACE DEMAND**  
**WALLOWA COUNTY URBAN AREAS (2008-2028)**

INDUSTRIAL	Base Year	Industrial Space Demand					Avg.	Industrial Space Demand 2/					'08-'28
	2008	2013	2018	2023	2028	F.A.R. 1/		2008	2013	2018	2023	2028	Change
<b><u>Baseline Growth Scenario</u></b>													
Enterprise	401,583	419,094	437,650	457,314	478,150	0.33		27.9	29.2	30.4	31.8	33.3	5.3
Joseph	151,851	155,223	158,818	162,645	166,719	0.33		10.6	10.8	11.0	11.3	11.6	1.0
Lostine	78,823	80,949	83,201	85,587	88,116	0.33		5.5	5.6	5.8	6.0	6.1	0.6
Wallowa	65,958	68,062	70,300	72,682	75,214	0.33		4.6	4.7	4.9	5.1	5.2	0.6
<b>Total</b>	<b>698,214</b>	<b>723,328</b>	<b>749,969</b>	<b>778,228</b>	<b>808,200</b>	<b>0.33</b>		<b>48.6</b>	<b>50.3</b>	<b>52.2</b>	<b>54.1</b>	<b>56.2</b>	<b>7.7</b>
<b><u>Medium Growth Scenario</u></b>													
Enterprise	401,583	423,009	445,769	469,953	495,658	0.33		27.9	29.4	31.0	32.7	34.5	6.5
Joseph	151,851	163,809	176,998	191,556	207,642	0.33		10.6	11.4	12.3	13.3	14.4	3.9
Lostine	78,823	81,529	84,390	87,415	90,615	0.33		5.5	5.7	5.9	6.1	6.3	0.8
Wallowa	65,958	72,271	79,382	87,406	96,480	0.33		4.6	5.0	5.5	6.1	6.7	2.1
<b>Total</b>	<b>698,214</b>	<b>740,619</b>	<b>786,538</b>	<b>836,330</b>	<b>890,395</b>	<b>0.33</b>		<b>48.6</b>	<b>51.5</b>	<b>54.7</b>	<b>58.2</b>	<b>61.9</b>	<b>13.4</b>
<b><u>Accelerated Growth Forecast</u></b>													
Enterprise	401,583	425,449	450,947	478,197	507,332	0.33		27.9	29.6	31.4	33.3	35.3	7.4
Joseph	151,851	168,068	186,663	208,034	232,648	0.33		10.6	11.7	13.0	14.5	16.2	5.6
Lostine	78,823	81,858	85,083	88,511	92,157	0.33		5.5	5.7	5.9	6.2	6.4	0.9
Wallowa	65,958	74,218	83,944	95,447	109,109	0.33		4.6	5.2	5.8	6.6	7.6	3.0
<b>Total</b>	<b>698,214</b>	<b>749,593</b>	<b>806,637</b>	<b>870,189</b>	<b>941,246</b>	<b>0.33</b>		<b>48.6</b>	<b>52.1</b>	<b>56.1</b>	<b>60.5</b>	<b>65.5</b>	<b>16.9</b>

1/ Regional Industrial Land Study Phase III (EcoNorthwest and Otak, Inc., 2001)

**EXHIBIT 1.5**  
**INDUSTRIAL SPACE DEMAND**  
**WALLOWA COUNTY URBAN AREAS (2008-2028)**

SPECIALIZED USES	Base Year	Industrial Utilizing Employment				Estimated Density (Emp / Acre)	Industrial Space Demand 2/					'08-'28
	2008	2013	2018	2023	2028		2008	2013	2018	2023	2028	Change
Baseline Growth Scenario												
Enterprise	308	341	378	419	465	25	12.3	13.6	15.1	16.8	18.6	6.3
Joseph	47	51	55	60	65	25	1.9	2.1	2.2	2.4	2.6	0.7
Lostine	9	10	11	12	14	25	0.4	0.4	0.4	0.5	0.5	0.2
Wallowa	43	48	53	58	64	25	1.7	1.9	2.1	2.3	2.6	0.8
Total	408	450	497	549	607	25	16.3	18.0	19.9	22.0	24.3	8.0
Medium Growth Scenario												
Enterprise	308	341	379	421	468	25	12.3	13.7	15.2	16.8	18.7	6.4
Joseph	47	52	56	61	67	25	1.9	2.1	2.2	2.5	2.7	0.8
Lostine	9	10	11	13	14	25	0.4	0.4	0.5	0.5	0.6	0.2
Wallowa	43	48	54	60	67	25	1.7	1.9	2.1	2.4	2.7	0.9
Total	408	451	500	554	615	25	16.3	18.1	20.0	22.2	24.6	8.3
Accelerated Growth Forecast												
Enterprise	308	354	407	470	543	25	12.3	14.1	16.3	18.8	21.7	9.4
Joseph	47	52	57	63	69	25	1.9	2.1	2.3	2.5	2.8	0.9
Lostine	9	10	12	13	15	25	0.4	0.4	0.5	0.5	0.6	0.2
Wallowa	43	49	55	62	69	25	1.7	1.9	2.2	2.5	2.8	1.0
Total	408	465	531	607	696	25	16.3	18.6	21.2	24.3	27.8	11.5

1/ Average office employment density by industry sector based on Urban Land Institute guidelines.

2/ Assumes a market-clearing 10% office space vacancy rate.

# EXHIBIT 1.6

## COMMERCIAL RETAIL SALES GROWTH, WALLOWA COUNTY URBAN AREAS (2008-2028)

WALLOWA COUNTY		Consumer Expenditures (In Millions \$)					'08-'28
		2008	2013	2018	2023	2028	Change
<b><u>Baseline Growth Scenario</u></b>							
441	Motor Vehicles and Parts Dealers	\$ 25.1	\$ 28.3	\$ 31.7	\$ 35.3	\$ 38.8	\$ 13.6
442	Furniture and Home Furnishings Stores	\$ 2.8	\$ 3.1	\$ 3.5	\$ 3.9	\$ 4.3	\$ 1.5
443	Electronics and Appliance Stores	\$ 2.6	\$ 2.9	\$ 3.3	\$ 3.6	\$ 4.0	\$ 1.4
444	Building Materials and Garden Equipment	\$ 12.9	\$ 14.5	\$ 16.2	\$ 18.1	\$ 19.8	\$ 7.0
445	Food and Beverage Stores	\$ 15.4	\$ 17.4	\$ 19.5	\$ 21.7	\$ 23.8	\$ 8.4
446	Health and Personal Care Stores	\$ 6.4	\$ 7.2	\$ 8.0	\$ 8.9	\$ 9.8	\$ 3.4
448	Clothing and Clothing Accessories Stores	\$ 4.4	\$ 4.9	\$ 5.5	\$ 6.1	\$ 6.7	\$ 2.4
451	Sporting Goods, Hobby, Book and Music Stores	\$ 2.0	\$ 2.3	\$ 2.5	\$ 2.8	\$ 3.1	\$ 1.1
452	General Merchandise Stores	\$ 13.8	\$ 15.5	\$ 17.4	\$ 19.4	\$ 21.3	\$ 7.5
453	Miscellaneous Store Retailers	\$ 3.1	\$ 3.5	\$ 3.9	\$ 4.3	\$ 4.8	\$ 1.7
722	Foodservices and Drinking Places	\$ 10.5	\$ 11.8	\$ 13.3	\$ 14.8	\$ 16.2	\$ 5.7
	<b>TOTAL</b>	<b>\$ 98.9</b>	<b>\$ 111.4</b>	<b>\$ 124.9</b>	<b>\$ 139.0</b>	<b>\$ 152.6</b>	<b>\$ 53.7</b>
<b><u>Medium Growth Scenario</u></b>							
441	Motor Vehicles and Parts Dealers	\$ 25.1	\$ 28.5	\$ 32.2	\$ 36.0	\$ 39.7	\$ 14.6
442	Furniture and Home Furnishings Stores	\$ 2.8	\$ 3.2	\$ 3.6	\$ 4.0	\$ 4.4	\$ 1.6
443	Electronics and Appliance Stores	\$ 2.6	\$ 2.9	\$ 3.3	\$ 3.7	\$ 4.1	\$ 1.5
444	Building Materials and Garden Equipment	\$ 12.9	\$ 14.6	\$ 16.5	\$ 18.4	\$ 20.3	\$ 7.4
445	Food and Beverage Stores	\$ 15.4	\$ 17.5	\$ 19.8	\$ 22.1	\$ 24.4	\$ 8.9
446	Health and Personal Care Stores	\$ 6.4	\$ 7.2	\$ 8.1	\$ 9.1	\$ 10.0	\$ 3.7
448	Clothing and Clothing Accessories Stores	\$ 4.4	\$ 4.9	\$ 5.6	\$ 6.2	\$ 6.9	\$ 2.5
451	Sporting Goods, Hobby, Book and Music Stores	\$ 2.0	\$ 2.3	\$ 2.6	\$ 2.9	\$ 3.2	\$ 1.2
452	General Merchandise Stores	\$ 13.8	\$ 15.6	\$ 17.7	\$ 19.8	\$ 21.8	\$ 8.0
453	Miscellaneous Store Retailers	\$ 3.1	\$ 3.5	\$ 4.0	\$ 4.4	\$ 4.9	\$ 1.8
722	Foodservices and Drinking Places	\$ 10.5	\$ 11.9	\$ 13.5	\$ 15.1	\$ 16.6	\$ 6.1
	<b>TOTAL</b>	<b>\$ 98.9</b>	<b>\$ 112.2</b>	<b>\$ 126.8</b>	<b>\$ 141.9</b>	<b>\$ 156.2</b>	<b>\$ 57.3</b>
<b><u>Accelerated Growth Scenario</u></b>							
441	Motor Vehicles and Parts Dealers	\$ 25.1	\$ 28.6	\$ 32.5	\$ 36.4	\$ 40.9	\$ 15.7
442	Furniture and Home Furnishings Stores	\$ 2.8	\$ 3.2	\$ 3.6	\$ 4.0	\$ 4.5	\$ 1.7
443	Electronics and Appliance Stores	\$ 2.6	\$ 3.0	\$ 3.4	\$ 3.8	\$ 4.2	\$ 1.6
444	Building Materials and Garden Equipment	\$ 12.9	\$ 14.6	\$ 16.6	\$ 18.6	\$ 20.9	\$ 8.1
445	Food and Beverage Stores	\$ 15.4	\$ 17.6	\$ 19.9	\$ 22.4	\$ 25.1	\$ 9.7
446	Health and Personal Care Stores	\$ 6.4	\$ 7.2	\$ 8.2	\$ 9.2	\$ 10.3	\$ 4.0
448	Clothing and Clothing Accessories Stores	\$ 4.4	\$ 5.0	\$ 5.6	\$ 6.3	\$ 7.1	\$ 2.7
451	Sporting Goods, Hobby, Book and Music Stores	\$ 2.0	\$ 2.3	\$ 2.6	\$ 2.9	\$ 3.3	\$ 1.3
452	General Merchandise Stores	\$ 13.8	\$ 15.7	\$ 17.8	\$ 20.0	\$ 22.4	\$ 8.6
453	Miscellaneous Store Retailers	\$ 3.1	\$ 3.5	\$ 4.0	\$ 4.5	\$ 5.0	\$ 1.9
722	Foodservices and Drinking Places	\$ 10.5	\$ 12.0	\$ 13.6	\$ 15.2	\$ 17.1	\$ 6.6
	<b>TOTAL</b>	<b>\$ 98.9</b>	<b>\$ 112.7</b>	<b>\$ 127.8</b>	<b>\$ 143.3</b>	<b>\$ 160.9</b>	<b>\$ 62.0</b>

**EXHIBIT 1.6 (CONTINUED)**  
**COMMERCIAL RETAIL SALES GROWTH, WALLOWA COUNTY URBAN AREAS (2008-2028)**

<b>ENTERPRISE</b>		<b>Consumer Expenditures (In Millions \$)</b>					<b>'08-'28</b>
		<b>2008</b>	<b>2013</b>	<b>2018</b>	<b>2023</b>	<b>2028</b>	<b>Change</b>
<b><u>Baseline Growth Scenario</u></b>							
441	Motor Vehicles and Parts Dealers	\$ 7.0	\$ 9.1	\$ 10.2	\$ 11.3	\$ 12.4	\$ 5.4
442	Furniture and Home Furnishings Stores	\$ 0.8	\$ 1.0	\$ 1.1	\$ 1.3	\$ 1.4	\$ 0.6
443	Electronics and Appliance Stores	\$ 0.7	\$ 0.9	\$ 1.0	\$ 1.2	\$ 1.3	\$ 0.6
444	Building Materials and Garden Equipment	\$ 3.6	\$ 4.6	\$ 5.2	\$ 5.8	\$ 6.3	\$ 2.8
445	Food and Beverage Stores	\$ 4.3	\$ 5.6	\$ 6.2	\$ 6.9	\$ 7.6	\$ 3.3
446	Health and Personal Care Stores	\$ 1.8	\$ 2.3	\$ 2.6	\$ 2.9	\$ 3.1	\$ 1.4
448	Clothing and Clothing Accessories Stores	\$ 1.2	\$ 1.6	\$ 1.8	\$ 2.0	\$ 2.1	\$ 0.9
451	Sporting Goods, Hobby, Book and Music Stores	\$ 0.6	\$ 0.7	\$ 0.8	\$ 0.9	\$ 1.0	\$ 0.4
452	General Merchandise Stores	\$ 3.8	\$ 5.0	\$ 5.6	\$ 6.2	\$ 6.8	\$ 3.0
453	Miscellaneous Store Retailers	\$ 0.9	\$ 1.1	\$ 1.3	\$ 1.4	\$ 1.5	\$ 0.7
722	Foodservices and Drinking Places	\$ 2.9	\$ 3.8	\$ 4.3	\$ 4.7	\$ 5.2	\$ 2.3
	<b>TOTAL</b>	<b>\$ 27.5</b>	<b>\$ 35.6</b>	<b>\$ 40.0</b>	<b>\$ 44.5</b>	<b>\$ 48.8</b>	<b>\$ 21.4</b>
<b><u>Medium Growth Scenario</u></b>							
441	Motor Vehicles and Parts Dealers	\$ 7.0	\$ 9.1	\$ 10.3	\$ 11.5	\$ 12.7	\$ 5.7
442	Furniture and Home Furnishings Stores	\$ 0.8	\$ 1.0	\$ 1.1	\$ 1.3	\$ 1.4	\$ 0.6
443	Electronics and Appliance Stores	\$ 0.7	\$ 0.9	\$ 1.1	\$ 1.2	\$ 1.3	\$ 0.6
444	Building Materials and Garden Equipment	\$ 3.6	\$ 4.7	\$ 5.3	\$ 5.9	\$ 6.5	\$ 2.9
445	Food and Beverage Stores	\$ 4.3	\$ 5.6	\$ 6.3	\$ 7.1	\$ 7.8	\$ 3.5
446	Health and Personal Care Stores	\$ 1.8	\$ 2.3	\$ 2.6	\$ 2.9	\$ 3.2	\$ 1.4
448	Clothing and Clothing Accessories Stores	\$ 1.2	\$ 1.6	\$ 1.8	\$ 2.0	\$ 2.2	\$ 1.0
451	Sporting Goods, Hobby, Book and Music Stores	\$ 0.6	\$ 0.7	\$ 0.8	\$ 0.9	\$ 1.0	\$ 0.5
452	General Merchandise Stores	\$ 3.8	\$ 5.0	\$ 5.7	\$ 6.3	\$ 7.0	\$ 3.1
453	Miscellaneous Store Retailers	\$ 0.9	\$ 1.1	\$ 1.3	\$ 1.4	\$ 1.6	\$ 0.7
722	Foodservices and Drinking Places	\$ 2.9	\$ 3.8	\$ 4.3	\$ 4.8	\$ 5.3	\$ 2.4
	<b>TOTAL</b>	<b>\$ 27.5</b>	<b>\$ 35.9</b>	<b>\$ 40.6</b>	<b>\$ 45.4</b>	<b>\$ 50.0</b>	<b>\$ 22.5</b>
<b><u>Accelerated Growth Scenario</u></b>							
441	Motor Vehicles and Parts Dealers	\$ 7.0	\$ 9.2	\$ 10.4	\$ 11.6	\$ 13.1	\$ 6.1
442	Furniture and Home Furnishings Stores	\$ 0.8	\$ 1.0	\$ 1.2	\$ 1.3	\$ 1.4	\$ 0.7
443	Electronics and Appliance Stores	\$ 0.7	\$ 0.9	\$ 1.1	\$ 1.2	\$ 1.4	\$ 0.6
444	Building Materials and Garden Equipment	\$ 3.6	\$ 4.7	\$ 5.3	\$ 6.0	\$ 6.7	\$ 3.1
445	Food and Beverage Stores	\$ 4.3	\$ 5.6	\$ 6.4	\$ 7.2	\$ 8.0	\$ 3.7
446	Health and Personal Care Stores	\$ 1.8	\$ 2.3	\$ 2.6	\$ 2.9	\$ 3.3	\$ 1.5
448	Clothing and Clothing Accessories Stores	\$ 1.2	\$ 1.6	\$ 1.8	\$ 2.0	\$ 2.3	\$ 1.1
451	Sporting Goods, Hobby, Book and Music Stores	\$ 0.6	\$ 0.7	\$ 0.8	\$ 0.9	\$ 1.1	\$ 0.5
452	General Merchandise Stores	\$ 3.8	\$ 5.0	\$ 5.7	\$ 6.4	\$ 7.2	\$ 3.3
453	Miscellaneous Store Retailers	\$ 0.9	\$ 1.1	\$ 1.3	\$ 1.4	\$ 1.6	\$ 0.8
722	Foodservices and Drinking Places	\$ 2.9	\$ 3.8	\$ 4.4	\$ 4.9	\$ 5.5	\$ 2.6
	<b>TOTAL</b>	<b>\$ 27.5</b>	<b>\$ 36.1</b>	<b>\$ 40.9</b>	<b>\$ 45.9</b>	<b>\$ 51.5</b>	<b>\$ 24.0</b>

**EXHIBIT 1.6 (CONTINUED)**

**COMMERCIAL RETAIL SALES GROWTH, WALLOWA COUNTY URBAN AREAS (2008-2028)**

<b>JOSEPH</b>		<b>Consumer Expenditures (In Millions \$)</b>					<b>'08-'28</b>
		<b>2008</b>	<b>2013</b>	<b>2018</b>	<b>2023</b>	<b>2028</b>	<b>Change</b>
<b><u>Baseline Growth Scenario</u></b>							
441	Motor Vehicles and Parts Dealers	\$ 3.9	\$ 5.7	\$ 6.3	\$ 7.1	\$ 7.8	\$ 3.8
442	Furniture and Home Furnishings Stores	\$ 0.4	\$ 0.6	\$ 0.7	\$ 0.8	\$ 0.9	\$ 0.4
443	Electronics and Appliance Stores	\$ 0.4	\$ 0.6	\$ 0.7	\$ 0.7	\$ 0.8	\$ 0.4
444	Building Materials and Garden Equipment	\$ 2.0	\$ 2.9	\$ 3.2	\$ 3.6	\$ 4.0	\$ 2.0
445	Food and Beverage Stores	\$ 2.4	\$ 3.5	\$ 3.9	\$ 4.3	\$ 4.8	\$ 2.4
446	Health and Personal Care Stores	\$ 1.0	\$ 1.4	\$ 1.6	\$ 1.8	\$ 2.0	\$ 1.0
448	Clothing and Clothing Accessories Stores	\$ 0.7	\$ 1.0	\$ 1.1	\$ 1.2	\$ 1.3	\$ 0.7
451	Sporting Goods, Hobby, Book and Music Stores	\$ 0.3	\$ 0.5	\$ 0.5	\$ 0.6	\$ 0.6	\$ 0.3
452	General Merchandise Stores	\$ 2.1	\$ 3.1	\$ 3.5	\$ 3.9	\$ 4.3	\$ 2.1
453	Miscellaneous Store Retailers	\$ 0.5	\$ 0.7	\$ 0.8	\$ 0.9	\$ 1.0	\$ 0.5
722	Foodservices and Drinking Places	\$ 1.6	\$ 2.4	\$ 2.7	\$ 3.0	\$ 3.2	\$ 1.6
	<b>TOTAL</b>	<b>\$ 15.36</b>	<b>\$ 22.27</b>	<b>\$ 24.99</b>	<b>\$ 27.79</b>	<b>\$ 30.52</b>	<b>\$ 15.2</b>
<b><u>Medium Growth Scenario</u></b>							
441	Motor Vehicles and Parts Dealers	\$ 3.9	\$ 5.7	\$ 6.4	\$ 7.2	\$ 7.9	\$ 4.0
442	Furniture and Home Furnishings Stores	\$ 0.4	\$ 0.6	\$ 0.7	\$ 0.8	\$ 0.9	\$ 0.4
443	Electronics and Appliance Stores	\$ 0.4	\$ 0.6	\$ 0.7	\$ 0.7	\$ 0.8	\$ 0.4
444	Building Materials and Garden Equipment	\$ 2.0	\$ 2.9	\$ 3.3	\$ 3.7	\$ 4.1	\$ 2.1
445	Food and Beverage Stores	\$ 2.4	\$ 3.5	\$ 4.0	\$ 4.4	\$ 4.9	\$ 2.5
446	Health and Personal Care Stores	\$ 1.0	\$ 1.4	\$ 1.6	\$ 1.8	\$ 2.0	\$ 1.0
448	Clothing and Clothing Accessories Stores	\$ 0.7	\$ 1.0	\$ 1.1	\$ 1.2	\$ 1.4	\$ 0.7
451	Sporting Goods, Hobby, Book and Music Stores	\$ 0.3	\$ 0.5	\$ 0.5	\$ 0.6	\$ 0.6	\$ 0.3
452	General Merchandise Stores	\$ 2.1	\$ 3.1	\$ 3.5	\$ 4.0	\$ 4.4	\$ 2.2
453	Miscellaneous Store Retailers	\$ 0.5	\$ 0.7	\$ 0.8	\$ 0.9	\$ 1.0	\$ 0.5
722	Foodservices and Drinking Places	\$ 1.6	\$ 2.4	\$ 2.7	\$ 3.0	\$ 3.3	\$ 1.7
	<b>TOTAL</b>	<b>\$ 15.36</b>	<b>\$ 22.45</b>	<b>\$ 25.37</b>	<b>\$ 28.37</b>	<b>\$ 31.24</b>	<b>\$ 15.9</b>
<b><u>Accelerated Growth Scenario</u></b>							
441	Motor Vehicles and Parts Dealers	\$ 3.9	\$ 5.7	\$ 6.5	\$ 7.3	\$ 8.2	\$ 4.3
442	Furniture and Home Furnishings Stores	\$ 0.4	\$ 0.6	\$ 0.7	\$ 0.8	\$ 0.9	\$ 0.5
443	Electronics and Appliance Stores	\$ 0.4	\$ 0.6	\$ 0.7	\$ 0.8	\$ 0.8	\$ 0.4
444	Building Materials and Garden Equipment	\$ 2.0	\$ 2.9	\$ 3.3	\$ 3.7	\$ 4.2	\$ 2.2
445	Food and Beverage Stores	\$ 2.4	\$ 3.5	\$ 4.0	\$ 4.5	\$ 5.0	\$ 2.6
446	Health and Personal Care Stores	\$ 1.0	\$ 1.4	\$ 1.6	\$ 1.8	\$ 2.1	\$ 1.1
448	Clothing and Clothing Accessories Stores	\$ 0.7	\$ 1.0	\$ 1.1	\$ 1.3	\$ 1.4	\$ 0.7
451	Sporting Goods, Hobby, Book and Music Stores	\$ 0.3	\$ 0.5	\$ 0.5	\$ 0.6	\$ 0.7	\$ 0.3
452	General Merchandise Stores	\$ 2.1	\$ 3.1	\$ 3.6	\$ 4.0	\$ 4.5	\$ 2.3
453	Miscellaneous Store Retailers	\$ 0.5	\$ 0.7	\$ 0.8	\$ 0.9	\$ 1.0	\$ 0.5
722	Foodservices and Drinking Places	\$ 1.6	\$ 2.4	\$ 2.7	\$ 3.0	\$ 3.4	\$ 1.8
	<b>TOTAL</b>	<b>\$ 15.36</b>	<b>\$ 22.54</b>	<b>\$ 25.56</b>	<b>\$ 28.66</b>	<b>\$ 32.18</b>	<b>\$ 16.8</b>



**EXHIBIT 1.6 (CONTINUED)**  
**COMMERCIAL RETAIL SALES GROWTH, WALLOWA COUNTY URBAN AREAS (2008-2028)**

LOSTINE		Consumer Expenditures (In Millions \$)						'08-'28
		2008	2013	2018	2023	2028	Change	
<b><u>Baseline Growth Scenario</u></b>								
441	Motor Vehicles and Parts Dealers	\$ 0.9	\$ 1.4	\$ 1.6	\$ 1.8	\$ 1.9	\$ 1.1	
442	Furniture and Home Furnishings Stores	\$ 0.1	\$ 0.2	\$ 0.2	\$ 0.2	\$ 0.2	\$ 0.1	
443	Electronics and Appliance Stores	\$ 0.1	\$ 0.1	\$ 0.2	\$ 0.2	\$ 0.2	\$ 0.1	
444	Building Materials and Garden Equipment	\$ 0.5	\$ 0.7	\$ 0.8	\$ 0.9	\$ 1.0	\$ 0.5	
445	Food and Beverage Stores	\$ 0.5	\$ 0.9	\$ 1.0	\$ 1.1	\$ 1.2	\$ 0.6	
446	Health and Personal Care Stores	\$ 0.2	\$ 0.4	\$ 0.4	\$ 0.4	\$ 0.5	\$ 0.3	
448	Clothing and Clothing Accessories Stores	\$ 0.2	\$ 0.2	\$ 0.3	\$ 0.3	\$ 0.3	\$ 0.2	
451	Sporting Goods, Hobby, Book and Music Stores	\$ 0.1	\$ 0.1	\$ 0.1	\$ 0.1	\$ 0.2	\$ 0.1	
452	General Merchandise Stores	\$ 0.5	\$ 0.8	\$ 0.9	\$ 1.0	\$ 1.1	\$ 0.6	
453	Miscellaneous Store Retailers	\$ 0.1	\$ 0.2	\$ 0.2	\$ 0.2	\$ 0.2	\$ 0.1	
722	Foodservices and Drinking Places	\$ 0.4	\$ 0.6	\$ 0.7	\$ 0.7	\$ 0.8	\$ 0.4	
<b>TOTAL</b>		<b>\$ 3.48</b>	<b>\$ 5.57</b>	<b>\$ 6.25</b>	<b>\$ 6.95</b>	<b>\$ 7.63</b>	<b>\$ 4.2</b>	
<b><u>Medium Growth Scenario</u></b>								
441	Motor Vehicles and Parts Dealers	\$ 0.9	\$ 1.4	\$ 1.6	\$ 1.8	\$ 2.0	\$ 1.1	
442	Furniture and Home Furnishings Stores	\$ 0.1	\$ 0.2	\$ 0.2	\$ 0.2	\$ 0.2	\$ 0.1	
443	Electronics and Appliance Stores	\$ 0.1	\$ 0.1	\$ 0.2	\$ 0.2	\$ 0.2	\$ 0.1	
444	Building Materials and Garden Equipment	\$ 0.5	\$ 0.7	\$ 0.8	\$ 0.9	\$ 1.0	\$ 0.6	
445	Food and Beverage Stores	\$ 0.5	\$ 0.9	\$ 1.0	\$ 1.1	\$ 1.2	\$ 0.7	
446	Health and Personal Care Stores	\$ 0.2	\$ 0.4	\$ 0.4	\$ 0.5	\$ 0.5	\$ 0.3	
448	Clothing and Clothing Accessories Stores	\$ 0.2	\$ 0.2	\$ 0.3	\$ 0.3	\$ 0.3	\$ 0.2	
451	Sporting Goods, Hobby, Book and Music Stores	\$ 0.1	\$ 0.1	\$ 0.1	\$ 0.1	\$ 0.2	\$ 0.1	
452	General Merchandise Stores	\$ 0.5	\$ 0.8	\$ 0.9	\$ 1.0	\$ 1.1	\$ 0.6	
453	Miscellaneous Store Retailers	\$ 0.1	\$ 0.2	\$ 0.2	\$ 0.2	\$ 0.2	\$ 0.1	
722	Foodservices and Drinking Places	\$ 0.4	\$ 0.6	\$ 0.7	\$ 0.8	\$ 0.8	\$ 0.5	
<b>TOTAL</b>		<b>\$ 3.48</b>	<b>\$ 5.61</b>	<b>\$ 6.34</b>	<b>\$ 7.09</b>	<b>\$ 7.81</b>	<b>\$ 4.3</b>	
<b><u>Accelerated Growth Scenario</u></b>								
441	Motor Vehicles and Parts Dealers	\$ 0.9	\$ 1.4	\$ 1.6	\$ 1.8	\$ 2.0	\$ 1.2	
442	Furniture and Home Furnishings Stores	\$ 0.1	\$ 0.2	\$ 0.2	\$ 0.2	\$ 0.2	\$ 0.1	
443	Electronics and Appliance Stores	\$ 0.1	\$ 0.1	\$ 0.2	\$ 0.2	\$ 0.2	\$ 0.1	
444	Building Materials and Garden Equipment	\$ 0.5	\$ 0.7	\$ 0.8	\$ 0.9	\$ 1.0	\$ 0.6	
445	Food and Beverage Stores	\$ 0.5	\$ 0.9	\$ 1.0	\$ 1.1	\$ 1.3	\$ 0.7	
446	Health and Personal Care Stores	\$ 0.2	\$ 0.4	\$ 0.4	\$ 0.5	\$ 0.5	\$ 0.3	
448	Clothing and Clothing Accessories Stores	\$ 0.2	\$ 0.2	\$ 0.3	\$ 0.3	\$ 0.4	\$ 0.2	
451	Sporting Goods, Hobby, Book and Music Stores	\$ 0.1	\$ 0.1	\$ 0.1	\$ 0.1	\$ 0.2	\$ 0.1	
452	General Merchandise Stores	\$ 0.5	\$ 0.8	\$ 0.9	\$ 1.0	\$ 1.1	\$ 0.6	
453	Miscellaneous Store Retailers	\$ 0.1	\$ 0.2	\$ 0.2	\$ 0.2	\$ 0.3	\$ 0.1	
722	Foodservices and Drinking Places	\$ 0.4	\$ 0.6	\$ 0.7	\$ 0.8	\$ 0.9	\$ 0.5	
<b>TOTAL</b>		<b>\$ 3.48</b>	<b>\$ 5.63</b>	<b>\$ 6.39</b>	<b>\$ 7.17</b>	<b>\$ 8.04</b>	<b>\$ 4.6</b>	

**EXHIBIT 1.6 (CONTINUED)**

**COMMERCIAL RETAIL SALES GROWTH, WALLOWA COUNTY URBAN AREAS (2008-2028)**

<b>WALLOWA</b>		<b>Consumer Expenditures (In Millions \$)</b>					<b>'08-'28</b>
		<b>2008</b>	<b>2013</b>	<b>2018</b>	<b>2023</b>	<b>2028</b>	<b>Change</b>
<b><u>Baseline Growth Scenario</u></b>							
441	Motor Vehicles and Parts Dealers	\$ 3.1	\$ 4.2	\$ 4.8	\$ 5.3	\$ 5.8	\$ 2.7
442	Furniture and Home Furnishings Stores	\$ 0.3	\$ 0.5	\$ 0.5	\$ 0.6	\$ 0.6	\$ 0.3
443	Electronics and Appliance Stores	\$ 0.3	\$ 0.4	\$ 0.5	\$ 0.5	\$ 0.6	\$ 0.3
444	Building Materials and Garden Equipment	\$ 1.6	\$ 2.2	\$ 2.4	\$ 2.7	\$ 3.0	\$ 1.4
445	Food and Beverage Stores	\$ 1.9	\$ 2.6	\$ 2.9	\$ 3.3	\$ 3.6	\$ 1.6
446	Health and Personal Care Stores	\$ 0.8	\$ 1.1	\$ 1.2	\$ 1.3	\$ 1.5	\$ 0.7
448	Clothing and Clothing Accessories Stores	\$ 0.5	\$ 0.7	\$ 0.8	\$ 0.9	\$ 1.0	\$ 0.5
451	Sporting Goods, Hobby, Book and Music Stores	\$ 0.3	\$ 0.3	\$ 0.4	\$ 0.4	\$ 0.5	\$ 0.2
452	General Merchandise Stores	\$ 1.7	\$ 2.3	\$ 2.6	\$ 2.9	\$ 3.2	\$ 1.5
453	Miscellaneous Store Retailers	\$ 0.4	\$ 0.5	\$ 0.6	\$ 0.7	\$ 0.7	\$ 0.3
722	Foodservices and Drinking Places	\$ 1.3	\$ 1.8	\$ 2.0	\$ 2.2	\$ 2.4	\$ 1.1
	<b>TOTAL</b>	<b>\$ 12.37</b>	<b>\$ 16.70</b>	<b>\$ 18.74</b>	<b>\$ 20.84</b>	<b>\$ 22.89</b>	<b>\$ 10.5</b>
<b><u>Medium Growth Scenario</u></b>							
441	Motor Vehicles and Parts Dealers	\$ 3.1	\$ 4.3	\$ 4.8	\$ 5.4	\$ 6.0	\$ 2.8
442	Furniture and Home Furnishings Stores	\$ 0.3	\$ 0.5	\$ 0.5	\$ 0.6	\$ 0.7	\$ 0.3
443	Electronics and Appliance Stores	\$ 0.3	\$ 0.4	\$ 0.5	\$ 0.6	\$ 0.6	\$ 0.3
444	Building Materials and Garden Equipment	\$ 1.6	\$ 2.2	\$ 2.5	\$ 2.8	\$ 3.0	\$ 1.4
445	Food and Beverage Stores	\$ 1.9	\$ 2.6	\$ 3.0	\$ 3.3	\$ 3.7	\$ 1.7
446	Health and Personal Care Stores	\$ 0.8	\$ 1.1	\$ 1.2	\$ 1.4	\$ 1.5	\$ 0.7
448	Clothing and Clothing Accessories Stores	\$ 0.5	\$ 0.7	\$ 0.8	\$ 0.9	\$ 1.0	\$ 0.5
451	Sporting Goods, Hobby, Book and Music Stores	\$ 0.3	\$ 0.3	\$ 0.4	\$ 0.4	\$ 0.5	\$ 0.2
452	General Merchandise Stores	\$ 1.7	\$ 2.3	\$ 2.7	\$ 3.0	\$ 3.3	\$ 1.5
453	Miscellaneous Store Retailers	\$ 0.4	\$ 0.5	\$ 0.6	\$ 0.7	\$ 0.7	\$ 0.3
722	Foodservices and Drinking Places	\$ 1.3	\$ 1.8	\$ 2.0	\$ 2.3	\$ 2.5	\$ 1.2
	<b>TOTAL</b>	<b>\$ 12.37</b>	<b>\$ 16.84</b>	<b>\$ 19.03</b>	<b>\$ 21.28</b>	<b>\$ 23.43</b>	<b>\$ 11.1</b>
<b><u>Accelerated Growth Scenario</u></b>							
441	Motor Vehicles and Parts Dealers	\$ 3.1	\$ 4.3	\$ 4.9	\$ 5.5	\$ 6.1	\$ 3.0
442	Furniture and Home Furnishings Stores	\$ 0.3	\$ 0.5	\$ 0.5	\$ 0.6	\$ 0.7	\$ 0.3
443	Electronics and Appliance Stores	\$ 0.3	\$ 0.4	\$ 0.5	\$ 0.6	\$ 0.6	\$ 0.3
444	Building Materials and Garden Equipment	\$ 1.6	\$ 2.2	\$ 2.5	\$ 2.8	\$ 3.1	\$ 1.5
445	Food and Beverage Stores	\$ 1.9	\$ 2.6	\$ 3.0	\$ 3.4	\$ 3.8	\$ 1.8
446	Health and Personal Care Stores	\$ 0.8	\$ 1.1	\$ 1.2	\$ 1.4	\$ 1.5	\$ 0.8
448	Clothing and Clothing Accessories Stores	\$ 0.5	\$ 0.7	\$ 0.8	\$ 0.9	\$ 1.1	\$ 0.5
451	Sporting Goods, Hobby, Book and Music Stores	\$ 0.3	\$ 0.3	\$ 0.4	\$ 0.4	\$ 0.5	\$ 0.2
452	General Merchandise Stores	\$ 1.7	\$ 2.4	\$ 2.7	\$ 3.0	\$ 3.4	\$ 1.6
453	Miscellaneous Store Retailers	\$ 0.4	\$ 0.5	\$ 0.6	\$ 0.7	\$ 0.8	\$ 0.4
722	Foodservices and Drinking Places	\$ 1.3	\$ 1.8	\$ 2.0	\$ 2.3	\$ 2.6	\$ 1.3
	<b>TOTAL</b>	<b>\$ 12.37</b>	<b>\$ 16.90</b>	<b>\$ 19.17</b>	<b>\$ 21.50</b>	<b>\$ 24.13</b>	<b>\$ 11.8</b>

**EXHIBIT 1.7**  
**COMMERCIAL RETAIL SPACE DEMAND, WALLOWA COUNTY URBAN AREAS (2008-2028)**

WALLOWA COUNTY		Consumer Expenditures (In Millions \$)					Sales Support	Commercial Retail Space Demand 2/					'08-'28	
		2008	2013	2018	2023	2028	Factor 1/	2008	2013	2018	2023	2028	Change	
<b><u>Baseline Growth Scenario</u></b>														
441	Motor Vehicles and Parts Dealers	\$ 25.1	\$ 28.3	\$ 31.7	\$ 35.3	\$ 38.8	\$ 387	71,413	80,395	90,207	100,325	110,160	38,747	
442	Furniture and Home Furnishings Stores	\$ 2.8	\$ 3.1	\$ 3.5	\$ 3.9	\$ 4.3	\$ 209	14,658	16,502	18,516	20,593	22,611	7,953	
443	Electronics and Appliance Stores	\$ 2.6	\$ 2.9	\$ 3.3	\$ 3.6	\$ 4.0	\$ 302	9,454	10,643	11,942	13,281	14,583	5,129	
444	Building Materials and Garden Equipment	\$ 12.9	\$ 14.5	\$ 16.2	\$ 18.1	\$ 19.8	\$ 389	36,348	40,919	45,913	51,063	56,069	19,721	
445	Food and Beverage Stores	\$ 15.4	\$ 17.4	\$ 19.5	\$ 21.7	\$ 23.8	\$ 430	39,480	44,446	49,870	55,464	60,901	21,421	
446	Health and Personal Care Stores	\$ 6.4	\$ 7.2	\$ 8.0	\$ 8.9	\$ 9.8	\$ 279	25,042	28,192	31,632	35,180	38,629	13,587	
448	Clothing and Clothing Accessories Stores	\$ 4.4	\$ 4.9	\$ 5.5	\$ 6.1	\$ 6.7	\$ 156	30,711	34,574	38,793	43,145	47,374	16,663	
451	Sporting Goods, Hobby, Book and Music Stores	\$ 2.0	\$ 2.3	\$ 2.5	\$ 2.8	\$ 3.1	\$ 199	11,158	12,561	14,094	15,675	17,212	6,054	
452	General Merchandise Stores	\$ 13.8	\$ 15.5	\$ 17.4	\$ 19.4	\$ 21.3	\$ 164	92,403	104,024	116,720	129,812	142,537	50,135	
453	Miscellaneous Store Retailers	\$ 3.1	\$ 3.5	\$ 3.9	\$ 4.3	\$ 4.8	\$ 127	26,803	30,174	33,856	37,654	41,345	14,542	
722	Foodservices and Drinking Places	\$ 10.5	\$ 11.8	\$ 13.3	\$ 14.8	\$ 16.2	\$ 267	43,359	48,812	54,770	60,913	66,884	23,525	
	<b>TOTAL</b>	<b>\$ 98.91</b>	<b>\$ 111.35</b>	<b>\$ 124.94</b>	<b>\$ 138.96</b>	<b>\$ 152.58</b>		<b>400,829</b>	<b>451,243</b>	<b>506,315</b>	<b>563,106</b>	<b>618,305</b>	<b>217,476</b>	
<b><u>Medium Growth Scenario</u></b>														
441	Motor Vehicles and Parts Dealers	\$ 25.1	\$ 28.5	\$ 32.2	\$ 36.0	\$ 39.7	\$ 387	71,413	81,033	91,583	102,414	112,783	41,370	
442	Furniture and Home Furnishings Stores	\$ 2.8	\$ 3.2	\$ 3.6	\$ 4.0	\$ 4.4	\$ 209	14,658	16,633	18,798	21,022	23,150	8,492	
443	Electronics and Appliance Stores	\$ 2.6	\$ 2.9	\$ 3.3	\$ 3.7	\$ 4.1	\$ 302	9,454	10,727	12,124	13,558	14,931	5,477	
444	Building Materials and Garden Equipment	\$ 12.9	\$ 14.6	\$ 16.5	\$ 18.4	\$ 20.3	\$ 389	36,348	41,244	46,613	52,126	57,404	21,056	
445	Food and Beverage Stores	\$ 15.4	\$ 17.5	\$ 19.8	\$ 22.1	\$ 24.4	\$ 430	39,480	44,798	50,631	56,619	62,351	22,871	
446	Health and Personal Care Stores	\$ 6.4	\$ 7.2	\$ 8.1	\$ 9.1	\$ 10.0	\$ 279	25,042	28,415	32,114	35,913	39,549	14,507	
448	Clothing and Clothing Accessories Stores	\$ 4.4	\$ 4.9	\$ 5.6	\$ 6.2	\$ 6.9	\$ 156	30,711	34,848	39,385	44,043	48,502	17,791	
451	Sporting Goods, Hobby, Book and Music Stores	\$ 2.0	\$ 2.3	\$ 2.6	\$ 2.9	\$ 3.2	\$ 199	11,158	12,661	14,309	16,002	17,622	6,464	
452	General Merchandise Stores	\$ 13.8	\$ 15.6	\$ 17.7	\$ 19.8	\$ 21.8	\$ 164	92,403	104,849	118,500	132,515	145,931	53,529	
453	Miscellaneous Store Retailers	\$ 3.1	\$ 3.5	\$ 4.0	\$ 4.4	\$ 4.9	\$ 127	26,803	30,413	34,372	38,438	42,329	15,527	
722	Foodservices and Drinking Places	\$ 10.5	\$ 11.9	\$ 13.5	\$ 15.1	\$ 16.6	\$ 267	43,359	49,199	55,605	62,181	68,477	25,118	
	<b>TOTAL</b>	<b>\$ 98.91</b>	<b>\$ 112.24</b>	<b>\$ 126.85</b>	<b>\$ 141.85</b>	<b>\$ 156.21</b>		<b>400,829</b>	<b>454,820</b>	<b>514,034</b>	<b>574,830</b>	<b>633,029</b>	<b>232,200</b>	
<b><u>Accelerated Growth Scenario</u></b>														
441	Motor Vehicles and Parts Dealers	\$ 25.1	\$ 28.6	\$ 32.5	\$ 36.4	\$ 40.9	\$ 387	71,413	81,353	92,277	103,474	116,150	44,737	
442	Furniture and Home Furnishings Stores	\$ 2.8	\$ 3.2	\$ 3.6	\$ 4.0	\$ 4.5	\$ 209	14,658	16,699	18,941	21,239	23,841	9,183	
443	Electronics and Appliance Stores	\$ 2.6	\$ 3.0	\$ 3.4	\$ 3.8	\$ 4.2	\$ 302	9,454	10,770	12,216	13,698	15,376	5,922	
444	Building Materials and Garden Equipment	\$ 12.9	\$ 14.6	\$ 16.6	\$ 18.6	\$ 20.9	\$ 389	36,348	41,407	46,967	52,666	59,118	22,770	
445	Food and Beverage Stores	\$ 15.4	\$ 17.6	\$ 19.9	\$ 22.4	\$ 25.1	\$ 430	39,480	44,975	51,015	57,205	64,213	24,732	
446	Health and Personal Care Stores	\$ 6.4	\$ 7.2	\$ 8.2	\$ 9.2	\$ 10.3	\$ 279	25,042	28,527	32,358	36,284	40,729	15,688	
448	Clothing and Clothing Accessories Stores	\$ 4.4	\$ 5.0	\$ 5.6	\$ 6.3	\$ 7.1	\$ 156	30,711	34,986	39,684	44,499	49,950	19,239	
451	Sporting Goods, Hobby, Book and Music Stores	\$ 2.0	\$ 2.3	\$ 2.6	\$ 2.9	\$ 3.3	\$ 199	11,158	12,711	14,418	16,167	18,148	6,990	
452	General Merchandise Stores	\$ 13.8	\$ 15.7	\$ 17.8	\$ 20.0	\$ 22.4	\$ 164	92,403	105,263	119,399	133,886	150,288	57,886	
453	Miscellaneous Store Retailers	\$ 3.1	\$ 3.5	\$ 4.0	\$ 4.5	\$ 5.0	\$ 127	26,803	30,533	34,633	38,835	43,593	16,791	
722	Foodservices and Drinking Places	\$ 10.5	\$ 12.0	\$ 13.6	\$ 15.2	\$ 17.1	\$ 267	43,359	49,394	56,027	62,825	70,521	27,162	
	<b>TOTAL</b>	<b>\$ 98.91</b>	<b>\$ 112.68</b>	<b>\$ 127.81</b>	<b>\$ 143.32</b>	<b>\$ 160.88</b>		<b>400,829</b>	<b>456,617</b>	<b>517,934</b>	<b>580,778</b>	<b>651,928</b>	<b>251,099</b>	

1/ Based on national averages derived from "Dollars & Cents of Shopping Centers," Urban Land Institute, 2008. Median sales for neighborhood scale centers were used.

2/ Assumes a market-clearing retail space vacancy rate of 10%.

**EXHIBIT 1.7 (CONTINUED)**  
**COMMERCIAL RETAIL SPACE DEMAND, WALLOWA COUNTY URBAN AREAS (2008-2028)**

ENTERPRISE		Consumer Expenditures (In Millions \$)					Sales Support Factor 1/	Commercial Retail Space Demand 2/					'08-'28 Change
		2008	2013	2018	2023	2028		2008	2013	2018	2023	2028	
<b><u>Baseline Growth Scenario</u></b>													
441	Motor Vehicles and Parts Dealers	\$ 7.0	\$ 9.1	\$ 10.2	\$ 11.3	\$ 12.4	\$ 387	19,823	25,727	28,866	32,104	35,251	15,428
442	Furniture and Home Furnishings Stores	\$ 0.8	\$ 1.0	\$ 1.1	\$ 1.3	\$ 1.4	\$ 209	4,069	5,281	5,925	6,590	7,236	3,167
443	Electronics and Appliance Stores	\$ 0.7	\$ 0.9	\$ 1.0	\$ 1.2	\$ 1.3	\$ 302	2,624	3,406	3,821	4,250	4,667	2,042
444	Building Materials and Garden Equipment	\$ 3.6	\$ 4.6	\$ 5.2	\$ 5.8	\$ 6.3	\$ 389	10,089	13,094	14,692	16,340	17,942	7,853
445	Food and Beverage Stores	\$ 4.3	\$ 5.6	\$ 6.2	\$ 6.9	\$ 7.6	\$ 430	10,959	14,223	15,958	17,748	19,488	8,529
446	Health and Personal Care Stores	\$ 1.8	\$ 2.3	\$ 2.6	\$ 2.9	\$ 3.1	\$ 279	6,951	9,021	10,122	11,258	12,361	5,410
448	Clothing and Clothing Accessories Stores	\$ 1.2	\$ 1.6	\$ 1.8	\$ 2.0	\$ 2.1	\$ 156	8,525	11,064	12,414	13,806	15,160	6,635
451	Sporting Goods, Hobby, Book and Music Stores	\$ 0.6	\$ 0.7	\$ 0.8	\$ 0.9	\$ 1.0	\$ 199	3,097	4,020	4,510	5,016	5,508	2,411
452	General Merchandise Stores	\$ 3.8	\$ 5.0	\$ 5.6	\$ 6.2	\$ 6.8	\$ 164	25,649	33,288	37,350	41,540	45,612	19,963
453	Miscellaneous Store Retailers	\$ 0.9	\$ 1.1	\$ 1.3	\$ 1.4	\$ 1.5	\$ 127	7,440	9,656	10,834	12,049	13,230	5,790
722	Foodservices and Drinking Places	\$ 2.9	\$ 3.8	\$ 4.3	\$ 4.7	\$ 5.2	\$ 267	12,036	15,620	17,526	19,492	21,403	9,367
	<b>TOTAL</b>	<b>\$ 27.46</b>	<b>\$ 35.63</b>	<b>\$ 39.98</b>	<b>\$ 44.47</b>	<b>\$ 48.83</b>		<b>111,263</b>	<b>144,398</b>	<b>162,021</b>	<b>180,194</b>	<b>197,858</b>	<b>86,595</b>
<b><u>Medium Growth Scenario</u></b>													
441	Motor Vehicles and Parts Dealers	\$ 7.0	\$ 9.1	\$ 10.3	\$ 11.5	\$ 12.7	\$ 387	19,823	25,930	29,306	32,773	36,091	16,267
442	Furniture and Home Furnishings Stores	\$ 0.8	\$ 1.0	\$ 1.1	\$ 1.3	\$ 1.4	\$ 209	4,069	5,323	6,015	6,727	7,408	3,339
443	Electronics and Appliance Stores	\$ 0.7	\$ 0.9	\$ 1.1	\$ 1.2	\$ 1.3	\$ 302	2,624	3,433	3,880	4,339	4,778	2,154
444	Building Materials and Garden Equipment	\$ 3.6	\$ 4.7	\$ 5.3	\$ 5.9	\$ 6.5	\$ 389	10,089	13,198	14,916	16,680	18,369	8,280
445	Food and Beverage Stores	\$ 4.3	\$ 5.6	\$ 6.3	\$ 7.1	\$ 7.8	\$ 430	10,959	14,335	16,202	18,118	19,952	8,993
446	Health and Personal Care Stores	\$ 1.8	\$ 2.3	\$ 2.6	\$ 2.9	\$ 3.2	\$ 279	6,951	9,093	10,277	11,492	12,656	5,704
448	Clothing and Clothing Accessories Stores	\$ 1.2	\$ 1.6	\$ 1.8	\$ 2.0	\$ 2.2	\$ 156	8,525	11,151	12,603	14,094	15,521	6,996
451	Sporting Goods, Hobby, Book and Music Stores	\$ 0.6	\$ 0.7	\$ 0.8	\$ 0.9	\$ 1.0	\$ 199	3,097	4,051	4,579	5,121	5,639	2,542
452	General Merchandise Stores	\$ 3.8	\$ 5.0	\$ 5.7	\$ 6.3	\$ 7.0	\$ 164	25,649	33,552	37,920	42,405	46,698	21,049
453	Miscellaneous Store Retailers	\$ 0.9	\$ 1.1	\$ 1.3	\$ 1.4	\$ 1.6	\$ 127	7,440	9,732	10,999	12,300	13,545	6,105
722	Foodservices and Drinking Places	\$ 2.9	\$ 3.8	\$ 4.3	\$ 4.8	\$ 5.3	\$ 267	12,036	15,744	17,794	19,898	21,913	9,877
	<b>TOTAL</b>	<b>\$ 27.46</b>	<b>\$ 35.92</b>	<b>\$ 40.59</b>	<b>\$ 45.39</b>	<b>\$ 49.99</b>		<b>111,263</b>	<b>145,542</b>	<b>164,491</b>	<b>183,946</b>	<b>202,569</b>	<b>91,306</b>
<b><u>Accelerated Growth Scenario</u></b>													
441	Motor Vehicles and Parts Dealers	\$ 7.0	\$ 9.2	\$ 10.4	\$ 11.6	\$ 13.1	\$ 387	19,823	26,033	29,529	33,112	37,168	17,345
442	Furniture and Home Furnishings Stores	\$ 0.8	\$ 1.0	\$ 1.2	\$ 1.3	\$ 1.4	\$ 209	4,069	5,344	6,061	6,797	7,629	3,560
443	Electronics and Appliance Stores	\$ 0.7	\$ 0.9	\$ 1.1	\$ 1.2	\$ 1.4	\$ 302	2,624	3,446	3,909	4,383	4,920	2,296
444	Building Materials and Garden Equipment	\$ 3.6	\$ 4.7	\$ 5.3	\$ 6.0	\$ 6.7	\$ 389	10,089	13,250	15,029	16,853	18,918	8,828
445	Food and Beverage Stores	\$ 4.3	\$ 5.6	\$ 6.4	\$ 7.2	\$ 8.0	\$ 430	10,959	14,392	16,325	18,305	20,548	9,589
446	Health and Personal Care Stores	\$ 1.8	\$ 2.3	\$ 2.6	\$ 2.9	\$ 3.3	\$ 279	6,951	9,129	10,355	11,611	13,033	6,082
448	Clothing and Clothing Accessories Stores	\$ 1.2	\$ 1.6	\$ 1.8	\$ 2.0	\$ 2.3	\$ 156	8,525	11,195	12,699	14,240	15,984	7,459
451	Sporting Goods, Hobby, Book and Music Stores	\$ 0.6	\$ 0.7	\$ 0.8	\$ 0.9	\$ 1.1	\$ 199	3,097	4,067	4,614	5,174	5,807	2,710
452	General Merchandise Stores	\$ 3.8	\$ 5.0	\$ 5.7	\$ 6.4	\$ 7.2	\$ 164	25,649	33,684	38,208	42,843	48,092	22,443
453	Miscellaneous Store Retailers	\$ 0.9	\$ 1.1	\$ 1.3	\$ 1.4	\$ 1.6	\$ 127	7,440	9,771	11,083	12,427	13,950	6,510
722	Foodservices and Drinking Places	\$ 2.9	\$ 3.8	\$ 4.4	\$ 4.9	\$ 5.5	\$ 267	12,036	15,806	17,929	20,104	22,567	10,531
	<b>TOTAL</b>	<b>\$ 27.46</b>	<b>\$ 36.06</b>	<b>\$ 40.90</b>	<b>\$ 45.86</b>	<b>\$ 51.48</b>		<b>111,263</b>	<b>146,118</b>	<b>165,739</b>	<b>185,849</b>	<b>208,617</b>	<b>97,354</b>

**EXHIBIT 1.7 (CONTINUED)**  
**COMMERCIAL RETAIL SPACE DEMAND, WALLOWA COUNTY URBAN AREAS (2008-2028)**

JOSEPH		Consumer Expenditures (In Millions \$)					Sales Support	Commercial Retail Space Demand 2/					'08-'28	
		2008	2013	2018	2023	2028	Factor 1/	2008	2013	2018	2023	2028	Change	
Baseline Growth Scenario														
441	Motor Vehicles and Parts Dealers	\$ 3.9	\$ 5.7	\$ 6.3	\$ 7.1	\$ 7.8	\$ 387	11,091	16,079	18,041	20,065	22,032	10,941	
442	Furniture and Home Furnishings Stores	\$ 0.4	\$ 0.6	\$ 0.7	\$ 0.8	\$ 0.9	\$ 209	2,277	3,300	3,703	4,119	4,522	2,246	
443	Electronics and Appliance Stores	\$ 0.4	\$ 0.6	\$ 0.7	\$ 0.7	\$ 0.8	\$ 302	1,468	2,129	2,388	2,656	2,917	1,448	
444	Building Materials and Garden Equipment	\$ 2.0	\$ 2.9	\$ 3.2	\$ 3.6	\$ 4.0	\$ 389	5,645	8,184	9,183	10,213	11,214	5,569	
445	Food and Beverage Stores	\$ 2.4	\$ 3.5	\$ 3.9	\$ 4.3	\$ 4.8	\$ 430	6,132	8,889	9,974	11,093	12,180	6,049	
446	Health and Personal Care Stores	\$ 1.0	\$ 1.4	\$ 1.6	\$ 1.8	\$ 2.0	\$ 279	3,889	5,638	6,326	7,036	7,726	3,837	
448	Clothing and Clothing Accessories Stores	\$ 0.7	\$ 1.0	\$ 1.1	\$ 1.2	\$ 1.3	\$ 156	4,770	6,915	7,759	8,629	9,475	4,705	
451	Sporting Goods, Hobby, Book and Music Stores	\$ 0.3	\$ 0.5	\$ 0.5	\$ 0.6	\$ 0.6	\$ 199	1,733	2,512	2,819	3,135	3,442	1,709	
452	General Merchandise Stores	\$ 2.1	\$ 3.1	\$ 3.5	\$ 3.9	\$ 4.3	\$ 164	14,351	20,805	23,344	25,962	28,507	14,157	
453	Miscellaneous Store Retailers	\$ 0.5	\$ 0.7	\$ 0.8	\$ 0.9	\$ 1.0	\$ 127	4,163	6,035	6,771	7,531	8,269	4,106	
722	Foodservices and Drinking Places	\$ 1.6	\$ 2.4	\$ 2.7	\$ 3.0	\$ 3.2	\$ 267	6,734	9,762	10,954	12,183	13,377	6,643	
	TOTAL	\$ 15.36	\$ 22.27	\$ 24.99	\$ 27.79	\$ 30.52		62,251	90,249	101,263	112,621	123,661	61,410	
Medium Growth Scenario														
441	Motor Vehicles and Parts Dealers	\$ 3.9	\$ 5.7	\$ 6.4	\$ 7.2	\$ 7.9	\$ 387	11,091	16,207	18,317	20,483	22,557	11,466	
442	Furniture and Home Furnishings Stores	\$ 0.4	\$ 0.6	\$ 0.7	\$ 0.8	\$ 0.9	\$ 209	2,277	3,327	3,760	4,204	4,630	2,353	
443	Electronics and Appliance Stores	\$ 0.4	\$ 0.6	\$ 0.7	\$ 0.7	\$ 0.8	\$ 302	1,468	2,145	2,425	2,712	2,986	1,518	
444	Building Materials and Garden Equipment	\$ 2.0	\$ 2.9	\$ 3.3	\$ 3.7	\$ 4.1	\$ 389	5,645	8,249	9,323	10,425	11,481	5,836	
445	Food and Beverage Stores	\$ 2.4	\$ 3.5	\$ 4.0	\$ 4.4	\$ 4.9	\$ 430	6,132	8,960	10,126	11,324	12,470	6,339	
446	Health and Personal Care Stores	\$ 1.0	\$ 1.4	\$ 1.6	\$ 1.8	\$ 2.0	\$ 279	3,889	5,683	6,423	7,183	7,910	4,021	
448	Clothing and Clothing Accessories Stores	\$ 0.7	\$ 1.0	\$ 1.1	\$ 1.2	\$ 1.4	\$ 156	4,770	6,970	7,877	8,809	9,700	4,931	
451	Sporting Goods, Hobby, Book and Music Stores	\$ 0.3	\$ 0.5	\$ 0.5	\$ 0.6	\$ 0.6	\$ 199	1,733	2,532	2,862	3,200	3,524	1,791	
452	General Merchandise Stores	\$ 2.1	\$ 3.1	\$ 3.5	\$ 4.0	\$ 4.4	\$ 164	14,351	20,970	23,700	26,503	29,186	14,836	
453	Miscellaneous Store Retailers	\$ 0.5	\$ 0.7	\$ 0.8	\$ 0.9	\$ 1.0	\$ 127	4,163	6,083	6,874	7,688	8,466	4,303	
722	Foodservices and Drinking Places	\$ 1.6	\$ 2.4	\$ 2.7	\$ 3.0	\$ 3.3	\$ 267	6,734	9,840	11,121	12,436	13,695	6,961	
	TOTAL	\$ 15.36	\$ 22.45	\$ 25.37	\$ 28.37	\$ 31.24		62,251	90,964	102,807	114,966	126,606	64,355	
Accelerated Growth Scenario														
441	Motor Vehicles and Parts Dealers	\$ 3.9	\$ 5.7	\$ 6.5	\$ 7.3	\$ 8.2	\$ 387	11,091	16,271	18,455	20,695	23,230	12,139	
442	Furniture and Home Furnishings Stores	\$ 0.4	\$ 0.6	\$ 0.7	\$ 0.8	\$ 0.9	\$ 209	2,277	3,340	3,788	4,248	4,768	2,492	
443	Electronics and Appliance Stores	\$ 0.4	\$ 0.6	\$ 0.7	\$ 0.8	\$ 0.8	\$ 302	1,468	2,154	2,443	2,740	3,075	1,607	
444	Building Materials and Garden Equipment	\$ 2.0	\$ 2.9	\$ 3.3	\$ 3.7	\$ 4.2	\$ 389	5,645	8,281	9,393	10,533	11,824	6,179	
445	Food and Beverage Stores	\$ 2.4	\$ 3.5	\$ 4.0	\$ 4.5	\$ 5.0	\$ 430	6,132	8,995	10,203	11,441	12,843	6,711	
446	Health and Personal Care Stores	\$ 1.0	\$ 1.4	\$ 1.6	\$ 1.8	\$ 2.1	\$ 279	3,889	5,705	6,472	7,257	8,146	4,257	
448	Clothing and Clothing Accessories Stores	\$ 0.7	\$ 1.0	\$ 1.1	\$ 1.3	\$ 1.4	\$ 156	4,770	6,997	7,937	8,900	9,990	5,220	
451	Sporting Goods, Hobby, Book and Music Stores	\$ 0.3	\$ 0.5	\$ 0.5	\$ 0.6	\$ 0.7	\$ 199	1,733	2,542	2,884	3,233	3,630	1,897	
452	General Merchandise Stores	\$ 2.1	\$ 3.1	\$ 3.6	\$ 4.0	\$ 4.5	\$ 164	14,351	21,053	23,880	26,777	30,058	15,707	
453	Miscellaneous Store Retailers	\$ 0.5	\$ 0.7	\$ 0.8	\$ 0.9	\$ 1.0	\$ 127	4,163	6,107	6,927	7,767	8,719	4,556	
722	Foodservices and Drinking Places	\$ 1.6	\$ 2.4	\$ 2.7	\$ 3.0	\$ 3.4	\$ 267	6,734	9,879	11,205	12,565	14,104	7,370	
	TOTAL	\$ 15.36	\$ 22.54	\$ 25.56	\$ 28.66	\$ 32.18		62,251	91,323	103,587	116,156	130,386	68,135	

**EXHIBIT 1.7 (CONTINUED)**  
**COMMERCIAL RETAIL SPACE DEMAND, WALLOWA COUNTY URBAN AREAS (2008-2028)**

LOSTINE		Consumer Expenditures (In Millions \$)					Sales Support		Commercial Retail Space Demand 2/					'08-'28
		2008	2013	2018	2023	2028	Factor 1/	2008	2013	2018	2023	2028	Change	
<b><u>Baseline Growth Scenario</u></b>														
441	Motor Vehicles and Parts Dealers	\$ 0.9	\$ 1.4	\$ 1.6	\$ 1.8	\$ 1.9	\$ 387	2,509	4,020	4,510	5,016	5,508	2,999	
442	Furniture and Home Furnishings Stores	\$ 0.1	\$ 0.2	\$ 0.2	\$ 0.2	\$ 0.2	\$ 209	515	825	926	1,030	1,131	616	
443	Electronics and Appliance Stores	\$ 0.1	\$ 0.1	\$ 0.2	\$ 0.2	\$ 0.2	\$ 302	332	532	597	664	729	397	
444	Building Materials and Garden Equipment	\$ 0.5	\$ 0.7	\$ 0.8	\$ 0.9	\$ 1.0	\$ 389	1,277	2,046	2,296	2,553	2,803	1,526	
445	Food and Beverage Stores	\$ 0.5	\$ 0.9	\$ 1.0	\$ 1.1	\$ 1.2	\$ 430	1,387	2,222	2,494	2,773	3,045	1,658	
446	Health and Personal Care Stores	\$ 0.2	\$ 0.4	\$ 0.4	\$ 0.4	\$ 0.5	\$ 279	880	1,410	1,582	1,759	1,931	1,052	
448	Clothing and Clothing Accessories Stores	\$ 0.2	\$ 0.2	\$ 0.3	\$ 0.3	\$ 0.3	\$ 156	1,079	1,729	1,940	2,157	2,369	1,290	
451	Sporting Goods, Hobby, Book and Music Stores	\$ 0.1	\$ 0.1	\$ 0.1	\$ 0.1	\$ 0.2	\$ 199	392	628	705	784	861	469	
452	General Merchandise Stores	\$ 0.5	\$ 0.8	\$ 0.9	\$ 1.0	\$ 1.1	\$ 164	3,247	5,201	5,836	6,491	7,127	3,880	
453	Miscellaneous Store Retailers	\$ 0.1	\$ 0.2	\$ 0.2	\$ 0.2	\$ 0.2	\$ 127	942	1,509	1,693	1,883	2,067	1,125	
722	Foodservices and Drinking Places	\$ 0.4	\$ 0.6	\$ 0.7	\$ 0.7	\$ 0.8	\$ 267	1,524	2,441	2,738	3,046	3,344	1,821	
	<b>TOTAL</b>	\$ 3.48	\$ 5.57	\$ 6.25	\$ 6.95	\$ 7.63		14,084	22,562	25,316	28,155	30,915	16,831	
<b><u>Medium Growth Scenario</u></b>														
441	Motor Vehicles and Parts Dealers	\$ 0.9	\$ 1.4	\$ 1.6	\$ 1.8	\$ 2.0	\$ 387	2,509	4,052	4,579	5,121	5,639	3,130	
442	Furniture and Home Furnishings Stores	\$ 0.1	\$ 0.2	\$ 0.2	\$ 0.2	\$ 0.2	\$ 209	515	832	940	1,051	1,157	642	
443	Electronics and Appliance Stores	\$ 0.1	\$ 0.1	\$ 0.2	\$ 0.2	\$ 0.2	\$ 302	332	536	606	678	747	414	
444	Building Materials and Garden Equipment	\$ 0.5	\$ 0.7	\$ 0.8	\$ 0.9	\$ 1.0	\$ 389	1,277	2,062	2,331	2,606	2,870	1,593	
445	Food and Beverage Stores	\$ 0.5	\$ 0.9	\$ 1.0	\$ 1.1	\$ 1.2	\$ 430	1,387	2,240	2,532	2,831	3,118	1,730	
446	Health and Personal Care Stores	\$ 0.2	\$ 0.4	\$ 0.4	\$ 0.5	\$ 0.5	\$ 279	880	1,421	1,606	1,796	1,977	1,098	
448	Clothing and Clothing Accessories Stores	\$ 0.2	\$ 0.2	\$ 0.3	\$ 0.3	\$ 0.3	\$ 156	1,079	1,742	1,969	2,202	2,425	1,346	
451	Sporting Goods, Hobby, Book and Music Stores	\$ 0.1	\$ 0.1	\$ 0.1	\$ 0.1	\$ 0.2	\$ 199	392	633	715	800	881	489	
452	General Merchandise Stores	\$ 0.5	\$ 0.8	\$ 0.9	\$ 1.0	\$ 1.1	\$ 164	3,247	5,242	5,925	6,626	7,297	4,050	
453	Miscellaneous Store Retailers	\$ 0.1	\$ 0.2	\$ 0.2	\$ 0.2	\$ 0.2	\$ 127	942	1,521	1,719	1,922	2,116	1,175	
722	Foodservices and Drinking Places	\$ 0.4	\$ 0.6	\$ 0.7	\$ 0.8	\$ 0.8	\$ 267	1,524	2,460	2,780	3,109	3,424	1,900	
	<b>TOTAL</b>	\$ 3.48	\$ 5.61	\$ 6.34	\$ 7.09	\$ 7.81		14,084	22,741	25,702	28,742	31,651	17,568	
<b><u>Accelerated Growth Scenario</u></b>														
441	Motor Vehicles and Parts Dealers	\$ 0.9	\$ 1.4	\$ 1.6	\$ 1.8	\$ 2.0	\$ 387	2,509	4,068	4,614	5,174	5,808	3,298	
442	Furniture and Home Furnishings Stores	\$ 0.1	\$ 0.2	\$ 0.2	\$ 0.2	\$ 0.2	\$ 209	515	835	947	1,062	1,192	677	
443	Electronics and Appliance Stores	\$ 0.1	\$ 0.1	\$ 0.2	\$ 0.2	\$ 0.2	\$ 302	332	538	611	685	769	437	
444	Building Materials and Garden Equipment	\$ 0.5	\$ 0.7	\$ 0.8	\$ 0.9	\$ 1.0	\$ 389	1,277	2,070	2,348	2,633	2,956	1,679	
445	Food and Beverage Stores	\$ 0.5	\$ 0.9	\$ 1.0	\$ 1.1	\$ 1.3	\$ 430	1,387	2,249	2,551	2,860	3,211	1,823	
446	Health and Personal Care Stores	\$ 0.2	\$ 0.4	\$ 0.4	\$ 0.5	\$ 0.5	\$ 279	880	1,426	1,618	1,814	2,036	1,157	
448	Clothing and Clothing Accessories Stores	\$ 0.2	\$ 0.2	\$ 0.3	\$ 0.3	\$ 0.4	\$ 156	1,079	1,749	1,984	2,225	2,498	1,418	
451	Sporting Goods, Hobby, Book and Music Stores	\$ 0.1	\$ 0.1	\$ 0.1	\$ 0.1	\$ 0.2	\$ 199	392	636	721	808	907	515	
452	General Merchandise Stores	\$ 0.5	\$ 0.8	\$ 0.9	\$ 1.0	\$ 1.1	\$ 164	3,247	5,263	5,970	6,694	7,514	4,268	
453	Miscellaneous Store Retailers	\$ 0.1	\$ 0.2	\$ 0.2	\$ 0.2	\$ 0.3	\$ 127	942	1,527	1,732	1,942	2,180	1,238	
722	Foodservices and Drinking Places	\$ 0.4	\$ 0.6	\$ 0.7	\$ 0.8	\$ 0.9	\$ 267	1,524	2,470	2,801	3,141	3,526	2,003	
	<b>TOTAL</b>	\$ 3.48	\$ 5.63	\$ 6.39	\$ 7.17	\$ 8.04		14,084	22,831	25,897	29,039	32,596	18,512	

**EXHIBIT 1.7 (CONTINUED)**  
**COMMERCIAL RETAIL SPACE DEMAND, WALLOWA COUNTY URBAN AREAS (2008-2028)**

WALLOWA		Consumer Expenditures (In Millions \$)					Sales Support		Commercial Retail Space Demand 2/					'08-'28
		2008	2013	2018	2023	2028	Factor 1/	2008	2013	2018	2023	2028	Change	
<b><u>Baseline Growth Scenario</u></b>														
441	Motor Vehicles and Parts Dealers	\$ 3.1	\$ 4.2	\$ 4.8	\$ 5.3	\$ 5.8	\$ 387	8,933	12,059	13,531	15,049	16,524	7,591	
442	Furniture and Home Furnishings Stores	\$ 0.3	\$ 0.5	\$ 0.5	\$ 0.6	\$ 0.6	\$ 209	1,834	2,475	2,777	3,089	3,392	1,558	
443	Electronics and Appliance Stores	\$ 0.3	\$ 0.4	\$ 0.5	\$ 0.5	\$ 0.6	\$ 302	1,183	1,596	1,791	1,992	2,188	1,005	
444	Building Materials and Garden Equipment	\$ 1.6	\$ 2.2	\$ 2.4	\$ 2.7	\$ 3.0	\$ 389	4,547	6,138	6,887	7,659	8,410	3,864	
445	Food and Beverage Stores	\$ 1.9	\$ 2.6	\$ 2.9	\$ 3.3	\$ 3.6	\$ 430	4,939	6,667	7,481	8,320	9,135	4,197	
446	Health and Personal Care Stores	\$ 0.8	\$ 1.1	\$ 1.2	\$ 1.3	\$ 1.5	\$ 279	3,132	4,229	4,745	5,277	5,794	2,662	
448	Clothing and Clothing Accessories Stores	\$ 0.5	\$ 0.7	\$ 0.8	\$ 0.9	\$ 1.0	\$ 156	3,842	5,186	5,819	6,472	7,106	3,265	
451	Sporting Goods, Hobby, Book and Music Stores	\$ 0.3	\$ 0.3	\$ 0.4	\$ 0.4	\$ 0.5	\$ 199	1,396	1,884	2,114	2,351	2,582	1,186	
452	General Merchandise Stores	\$ 1.7	\$ 2.3	\$ 2.6	\$ 2.9	\$ 3.2	\$ 164	11,558	15,604	17,508	19,472	21,381	9,822	
453	Miscellaneous Store Retailers	\$ 0.4	\$ 0.5	\$ 0.6	\$ 0.7	\$ 0.7	\$ 127	3,353	4,526	5,078	5,648	6,202	2,849	
722	Foodservices and Drinking Places	\$ 1.3	\$ 1.8	\$ 2.0	\$ 2.2	\$ 2.4	\$ 267	5,424	7,322	8,215	9,137	10,033	4,609	
TOTAL		\$ 12.37	\$ 16.70	\$ 18.74	\$ 20.84	\$ 22.89		50,139	67,686	75,947	84,466	92,746	42,607	
<b><u>Medium Growth Scenario</u></b>														
441	Motor Vehicles and Parts Dealers	\$ 3.1	\$ 4.3	\$ 4.8	\$ 5.4	\$ 6.0	\$ 387	8,933	12,155	13,737	15,362	16,917	7,985	
442	Furniture and Home Furnishings Stores	\$ 0.3	\$ 0.5	\$ 0.5	\$ 0.6	\$ 0.7	\$ 209	1,834	2,495	2,820	3,153	3,472	1,639	
443	Electronics and Appliance Stores	\$ 0.3	\$ 0.4	\$ 0.5	\$ 0.6	\$ 0.6	\$ 302	1,183	1,609	1,819	2,034	2,240	1,057	
444	Building Materials and Garden Equipment	\$ 1.6	\$ 2.2	\$ 2.5	\$ 2.8	\$ 3.0	\$ 389	4,547	6,187	6,992	7,819	8,611	4,064	
445	Food and Beverage Stores	\$ 1.9	\$ 2.6	\$ 3.0	\$ 3.3	\$ 3.7	\$ 430	4,939	6,720	7,595	8,493	9,353	4,414	
446	Health and Personal Care Stores	\$ 0.8	\$ 1.1	\$ 1.2	\$ 1.4	\$ 1.5	\$ 279	3,132	4,262	4,817	5,387	5,932	2,800	
448	Clothing and Clothing Accessories Stores	\$ 0.5	\$ 0.7	\$ 0.8	\$ 0.9	\$ 1.0	\$ 156	3,842	5,227	5,908	6,606	7,275	3,434	
451	Sporting Goods, Hobby, Book and Music Stores	\$ 0.3	\$ 0.3	\$ 0.4	\$ 0.4	\$ 0.5	\$ 199	1,396	1,899	2,146	2,400	2,643	1,248	
452	General Merchandise Stores	\$ 1.7	\$ 2.3	\$ 2.7	\$ 3.0	\$ 3.3	\$ 164	11,558	15,727	17,775	19,877	21,890	10,331	
453	Miscellaneous Store Retailers	\$ 0.4	\$ 0.5	\$ 0.6	\$ 0.7	\$ 0.7	\$ 127	3,353	4,562	5,156	5,766	6,349	2,997	
722	Foodservices and Drinking Places	\$ 1.3	\$ 1.8	\$ 2.0	\$ 2.3	\$ 2.5	\$ 267	5,424	7,380	8,341	9,327	10,272	4,848	
TOTAL		\$ 12.37	\$ 16.84	\$ 19.03	\$ 21.28	\$ 23.43		50,139	68,223	77,105	86,225	94,954	44,816	
<b><u>Accelerated Growth Scenario</u></b>														
441	Motor Vehicles and Parts Dealers	\$ 3.1	\$ 4.3	\$ 4.9	\$ 5.5	\$ 6.1	\$ 387	8,933	12,203	13,842	15,521	17,423	8,490	
442	Furniture and Home Furnishings Stores	\$ 0.3	\$ 0.5	\$ 0.5	\$ 0.6	\$ 0.7	\$ 209	1,834	2,505	2,841	3,186	3,576	1,743	
443	Electronics and Appliance Stores	\$ 0.3	\$ 0.4	\$ 0.5	\$ 0.6	\$ 0.6	\$ 302	1,183	1,615	1,832	2,055	2,306	1,124	
444	Building Materials and Garden Equipment	\$ 1.6	\$ 2.2	\$ 2.5	\$ 2.8	\$ 3.1	\$ 389	4,547	6,211	7,045	7,900	8,868	4,321	
445	Food and Beverage Stores	\$ 1.9	\$ 2.6	\$ 3.0	\$ 3.4	\$ 3.8	\$ 430	4,939	6,746	7,652	8,581	9,632	4,693	
446	Health and Personal Care Stores	\$ 0.8	\$ 1.1	\$ 1.2	\$ 1.4	\$ 1.5	\$ 279	3,132	4,279	4,854	5,443	6,109	2,977	
448	Clothing and Clothing Accessories Stores	\$ 0.5	\$ 0.7	\$ 0.8	\$ 0.9	\$ 1.1	\$ 156	3,842	5,248	5,953	6,675	7,493	3,651	
451	Sporting Goods, Hobby, Book and Music Stores	\$ 0.3	\$ 0.3	\$ 0.4	\$ 0.4	\$ 0.5	\$ 199	1,396	1,907	2,163	2,425	2,722	1,326	
452	General Merchandise Stores	\$ 1.7	\$ 2.4	\$ 2.7	\$ 3.0	\$ 3.4	\$ 164	11,558	15,790	17,910	20,083	22,543	10,985	
453	Miscellaneous Store Retailers	\$ 0.4	\$ 0.5	\$ 0.6	\$ 0.7	\$ 0.8	\$ 127	3,353	4,580	5,195	5,825	6,539	3,186	
722	Foodservices and Drinking Places	\$ 1.3	\$ 1.8	\$ 2.0	\$ 2.3	\$ 2.6	\$ 267	5,424	7,409	8,404	9,424	10,578	5,154	
TOTAL		\$ 12.37	\$ 16.90	\$ 19.17	\$ 21.50	\$ 24.13		50,139	68,493	77,690	87,117	97,789	47,650	



**EXHIBIT 1.8**  
**COMMERCIAL RETAIL LAND DEMAND, WALLOWA COUNTY URBAN AREAS, (2008-2028)**

WALLOWA COUNTY		Commercial Retail Space Demand					Avg. F.A.R. 1/	Commercial Retail Land Demand					'08-'28 Change
		2008	2013	2018	2023	2028		2008	2013	2018	2023	2028	
<b><u>Baseline Growth Scenario</u></b>													
441	Motor Vehicles and Parts Dealers	71,413	80,395	90,207	100,325	110,160	0.25	6.6	7.4	8.3	9.2	10.1	3.6
442	Furniture and Home Furnishings Stores	14,658	16,502	18,516	20,593	22,611	0.25	1.3	1.5	1.7	1.9	2.1	0.7
443	Electronics and Appliance Stores	9,454	10,643	11,942	13,281	14,583	0.25	0.9	1.0	1.1	1.2	1.3	0.5
444	Building Materials and Garden Equipment	36,348	40,919	45,913	51,063	56,069	0.25	3.3	3.8	4.2	4.7	5.1	1.8
445	Food and Beverage Stores	39,480	44,446	49,870	55,464	60,901	0.25	3.6	4.1	4.6	5.1	5.6	2.0
446	Health and Personal Care Stores	25,042	28,192	31,632	35,180	38,629	0.25	2.3	2.6	2.9	3.2	3.5	1.2
448	Clothing and Clothing Accessories Stores	30,711	34,574	38,793	43,145	47,374	0.25	2.8	3.2	3.6	4.0	4.4	1.5
451	Sporting Goods, Hobby, Book and Music Stores	11,158	12,561	14,094	15,675	17,212	0.25	1.0	1.2	1.3	1.4	1.6	0.6
452	General Merchandise Stores	92,403	104,024	116,720	129,812	142,537	0.25	8.5	9.6	10.7	11.9	13.1	4.6
453	Miscellaneous Store Retailers	26,803	30,174	33,856	37,654	41,345	0.25	2.5	2.8	3.1	3.5	3.8	1.3
722	Foodservices and Drinking Places	43,359	48,812	54,770	60,913	66,884	0.25	4.0	4.5	5.0	5.6	6.1	2.2
	<b>TOTAL</b>	<b>400,829</b>	<b>451,243</b>	<b>506,315</b>	<b>563,106</b>	<b>618,305</b>		<b>36.8</b>	<b>41.4</b>	<b>46.5</b>	<b>51.7</b>	<b>56.8</b>	<b>20.0</b>
<b><u>Medium Growth Scenario</u></b>													
441	Motor Vehicles and Parts Dealers	71,413	81,033	91,583	102,414	112,783	0.25	6.6	7.4	8.4	9.4	10.4	3.8
442	Furniture and Home Furnishings Stores	14,658	16,633	18,798	21,022	23,150	0.25	1.3	1.5	1.7	1.9	2.1	0.8
443	Electronics and Appliance Stores	9,454	10,727	12,124	13,558	14,931	0.25	0.9	1.0	1.1	1.2	1.4	0.5
444	Building Materials and Garden Equipment	36,348	41,244	46,613	52,126	57,404	0.25	3.3	3.8	4.3	4.8	5.3	1.9
445	Food and Beverage Stores	39,480	44,798	50,631	56,619	62,351	0.25	3.6	4.1	4.6	5.2	5.7	2.1
446	Health and Personal Care Stores	25,042	28,415	32,114	35,913	39,549	0.25	2.3	2.6	2.9	3.3	3.6	1.3
448	Clothing and Clothing Accessories Stores	30,711	34,848	39,385	44,043	48,502	0.25	2.8	3.2	3.6	4.0	4.5	1.6
451	Sporting Goods, Hobby, Book and Music Stores	11,158	12,661	14,309	16,002	17,622	0.25	1.0	1.2	1.3	1.5	1.6	0.6
452	General Merchandise Stores	92,403	104,849	118,500	132,515	145,931	0.25	8.5	9.6	10.9	12.2	13.4	4.9
453	Miscellaneous Store Retailers	26,803	30,413	34,372	38,438	42,329	0.25	2.5	2.8	3.2	3.5	3.9	1.4
722	Foodservices and Drinking Places	43,359	49,199	55,605	62,181	68,477	0.25	4.0	4.5	5.1	5.7	6.3	2.3
	<b>TOTAL</b>	<b>400,829</b>	<b>454,820</b>	<b>514,034</b>	<b>574,830</b>	<b>633,029</b>		<b>36.8</b>	<b>41.8</b>	<b>47.2</b>	<b>52.8</b>	<b>58.1</b>	<b>21.3</b>
<b><u>Accelerated Growth Scenario</u></b>													
441	Motor Vehicles and Parts Dealers	71,413	81,353	92,277	103,474	116,150	0.25	6.6	7.5	8.5	9.5	10.7	4.1
442	Furniture and Home Furnishings Stores	14,658	16,699	18,941	21,239	23,841	0.25	1.3	1.5	1.7	2.0	2.2	0.8
443	Electronics and Appliance Stores	9,454	10,770	12,216	13,698	15,376	0.25	0.9	1.0	1.1	1.3	1.4	0.5
444	Building Materials and Garden Equipment	36,348	41,407	46,967	52,666	59,118	0.25	3.3	3.8	4.3	4.8	5.4	2.1
445	Food and Beverage Stores	39,480	44,975	51,015	57,205	64,213	0.25	3.6	4.1	4.7	5.3	5.9	2.3
446	Health and Personal Care Stores	25,042	28,527	32,358	36,284	40,729	0.25	2.3	2.6	3.0	3.3	3.7	1.4
448	Clothing and Clothing Accessories Stores	30,711	34,986	39,684	44,499	49,950	0.25	2.8	3.2	3.6	4.1	4.6	1.8
451	Sporting Goods, Hobby, Book and Music Stores	11,158	12,711	14,418	16,167	18,148	0.25	1.0	1.2	1.3	1.5	1.7	0.6
452	General Merchandise Stores	92,403	105,263	119,399	133,886	150,288	0.25	8.5	9.7	11.0	12.3	13.8	5.3
453	Miscellaneous Store Retailers	26,803	30,533	34,633	38,835	43,593	0.25	2.5	2.8	3.2	3.6	4.0	1.5
722	Foodservices and Drinking Places	43,359	49,394	56,027	62,825	70,521	0.25	4.0	4.5	5.1	5.8	6.5	2.5
	<b>TOTAL</b>	<b>400,829</b>	<b>456,617</b>	<b>517,934</b>	<b>580,778</b>	<b>651,928</b>		<b>36.8</b>	<b>41.9</b>	<b>47.6</b>	<b>53.3</b>	<b>59.9</b>	<b>23.1</b>

1/ Floor Area Ratio assumes typical suburban retail Development Form



**EXHIBIT 1.8 (CONTINUED)**  
**COMMERCIAL RETAIL LAND DEMAND, WALLOWA COUNTY URBAN AREAS, (2008-2028)**

ENTERPRISE		Commercial Retail Space Demand					Avg. F.A.R. 1/	Commercial Retail Land Demand					'08-'28 Change
		2008	2013	2018	2023	2028		2008	2013	2018	2023	2028	
<b><u>Baseline Growth Scenario</u></b>													
441	Motor Vehicles and Parts Dealers	19,823	25,727	28,866	32,104	35,251	0.25	1.8	2.4	2.7	2.9	3.2	1.4
442	Furniture and Home Furnishings Stores	4,069	5,281	5,925	6,590	7,236	0.25	0.4	0.5	0.5	0.6	0.7	0.3
443	Electronics and Appliance Stores	2,624	3,406	3,821	4,250	4,667	0.25	0.2	0.3	0.4	0.4	0.4	0.2
444	Building Materials and Garden Equipment	10,089	13,094	14,692	16,340	17,942	0.25	0.9	1.2	1.3	1.5	1.6	0.7
445	Food and Beverage Stores	10,959	14,223	15,958	17,748	19,488	0.25	1.0	1.3	1.5	1.6	1.8	0.8
446	Health and Personal Care Stores	6,951	9,021	10,122	11,258	12,361	0.25	0.6	0.8	0.9	1.0	1.1	0.5
448	Clothing and Clothing Accessories Stores	8,525	11,064	12,414	13,806	15,160	0.25	0.8	1.0	1.1	1.3	1.4	0.6
451	Sporting Goods, Hobby, Book and Music Stores	3,097	4,020	4,510	5,016	5,508	0.25	0.3	0.4	0.4	0.5	0.5	0.2
452	General Merchandise Stores	25,649	33,288	37,350	41,540	45,612	0.25	2.4	3.1	3.4	3.8	4.2	1.8
453	Miscellaneous Store Retailers	7,440	9,656	10,834	12,049	13,230	0.25	0.7	0.9	1.0	1.1	1.2	0.5
722	Foodservices and Drinking Places	12,036	15,620	17,526	19,492	21,403	0.25	1.1	1.4	1.6	1.8	2.0	0.9
	<b>TOTAL</b>	<b>111,263</b>	<b>144,398</b>	<b>162,021</b>	<b>180,194</b>	<b>197,858</b>		<b>10.2</b>	<b>13.3</b>	<b>14.9</b>	<b>16.5</b>	<b>18.2</b>	<b>8.0</b>
<b><u>Medium Growth Scenario</u></b>													
441	Motor Vehicles and Parts Dealers	19,823	25,930	29,306	32,773	36,091	0.25	1.8	2.4	2.7	3.0	3.3	1.5
442	Furniture and Home Furnishings Stores	4,069	5,323	6,015	6,727	7,408	0.25	0.4	0.5	0.6	0.6	0.7	0.3
443	Electronics and Appliance Stores	2,624	3,433	3,880	4,339	4,778	0.25	0.2	0.3	0.4	0.4	0.4	0.2
444	Building Materials and Garden Equipment	10,089	13,198	14,916	16,680	18,369	0.25	0.9	1.2	1.4	1.5	1.7	0.8
445	Food and Beverage Stores	10,959	14,335	16,202	18,118	19,952	0.25	1.0	1.3	1.5	1.7	1.8	0.8
446	Health and Personal Care Stores	6,951	9,093	10,277	11,492	12,656	0.25	0.6	0.8	0.9	1.1	1.2	0.5
448	Clothing and Clothing Accessories Stores	8,525	11,151	12,603	14,094	15,521	0.25	0.8	1.0	1.2	1.3	1.4	0.6
451	Sporting Goods, Hobby, Book and Music Stores	3,097	4,051	4,579	5,121	5,639	0.25	0.3	0.4	0.4	0.5	0.5	0.2
452	General Merchandise Stores	25,649	33,552	37,920	42,405	46,698	0.25	2.4	3.1	3.5	3.9	4.3	1.9
453	Miscellaneous Store Retailers	7,440	9,732	10,999	12,300	13,545	0.25	0.7	0.9	1.0	1.1	1.2	0.6
722	Foodservices and Drinking Places	12,036	15,744	17,794	19,898	21,913	0.25	1.1	1.4	1.6	1.8	2.0	0.9
	<b>TOTAL</b>	<b>111,263</b>	<b>145,542</b>	<b>164,491</b>	<b>183,946</b>	<b>202,569</b>		<b>10.2</b>	<b>13.4</b>	<b>15.1</b>	<b>16.9</b>	<b>18.6</b>	<b>8.4</b>
<b><u>Accelerated Growth Scenario</u></b>													
441	Motor Vehicles and Parts Dealers	19,823	26,033	29,529	33,112	37,168	0.25	1.8	2.4	2.7	3.0	3.4	1.6
442	Furniture and Home Furnishings Stores	4,069	5,344	6,061	6,797	7,629	0.25	0.4	0.5	0.6	0.6	0.7	0.3
443	Electronics and Appliance Stores	2,624	3,446	3,909	4,383	4,920	0.25	0.2	0.3	0.4	0.4	0.5	0.2
444	Building Materials and Garden Equipment	10,089	13,250	15,029	16,853	18,918	0.25	0.9	1.2	1.4	1.5	1.7	0.8
445	Food and Beverage Stores	10,959	14,392	16,325	18,305	20,548	0.25	1.0	1.3	1.5	1.7	1.9	0.9
446	Health and Personal Care Stores	6,951	9,129	10,355	11,611	13,033	0.25	0.6	0.8	1.0	1.1	1.2	0.6
448	Clothing and Clothing Accessories Stores	8,525	11,195	12,699	14,240	15,984	0.25	0.8	1.0	1.2	1.3	1.5	0.7
451	Sporting Goods, Hobby, Book and Music Stores	3,097	4,067	4,614	5,174	5,807	0.25	0.3	0.4	0.4	0.5	0.5	0.2
452	General Merchandise Stores	25,649	33,684	38,208	42,843	48,092	0.25	2.4	3.1	3.5	3.9	4.4	2.1
453	Miscellaneous Store Retailers	7,440	9,771	11,083	12,427	13,950	0.25	0.7	0.9	1.0	1.1	1.3	0.6
722	Foodservices and Drinking Places	12,036	15,806	17,929	20,104	22,567	0.25	1.1	1.5	1.6	1.8	2.1	1.0
	<b>TOTAL</b>	<b>111,263</b>	<b>146,118</b>	<b>165,739</b>	<b>185,849</b>	<b>208,617</b>		<b>10.2</b>	<b>13.4</b>	<b>15.2</b>	<b>17.1</b>	<b>19.2</b>	<b>8.9</b>

**EXHIBIT 1.8 (CONTINUED)**  
**COMMERCIAL RETAIL LAND DEMAND, WALLOWA COUNTY URBAN AREAS, (2008-2028)**

JOSEPH		Commercial Retail Space Demand					Avg. F.A.R. 1/	Commercial Retail Land Demand					'08-'28 Change
		2008	2013	2018	2023	2028		2008	2013	2018	2023	2028	
<b><u>Baseline Growth Scenario</u></b>													
441	Motor Vehicles and Parts Dealers	11,091	16,079	18,041	20,065	22,032	0.25	1.0	1.5	1.7	1.8	2.0	1.0
442	Furniture and Home Furnishings Stores	2,277	3,300	3,703	4,119	4,522	0.25	0.2	0.3	0.3	0.4	0.4	0.2
443	Electronics and Appliance Stores	1,468	2,129	2,388	2,656	2,917	0.25	0.1	0.2	0.2	0.2	0.3	0.1
444	Building Materials and Garden Equipment	5,645	8,184	9,183	10,213	11,214	0.25	0.5	0.8	0.8	0.9	1.0	0.5
445	Food and Beverage Stores	6,132	8,889	9,974	11,093	12,180	0.25	0.6	0.8	0.9	1.0	1.1	0.6
446	Health and Personal Care Stores	3,889	5,638	6,326	7,036	7,726	0.25	0.4	0.5	0.6	0.6	0.7	0.4
448	Clothing and Clothing Accessories Stores	4,770	6,915	7,759	8,629	9,475	0.25	0.4	0.6	0.7	0.8	0.9	0.4
451	Sporting Goods, Hobby, Book and Music Stores	1,733	2,512	2,819	3,135	3,442	0.25	0.2	0.2	0.3	0.3	0.3	0.2
452	General Merchandise Stores	14,351	20,805	23,344	25,962	28,507	0.25	1.3	1.9	2.1	2.4	2.6	1.3
453	Miscellaneous Store Retailers	4,163	6,035	6,771	7,531	8,269	0.25	0.4	0.6	0.6	0.7	0.8	0.4
722	Foodservices and Drinking Places	6,734	9,762	10,954	12,183	13,377	0.25	0.6	0.9	1.0	1.1	1.2	0.6
	<b>TOTAL</b>	<b>62,251</b>	<b>90,249</b>	<b>101,263</b>	<b>112,621</b>	<b>123,661</b>		<b>5.7</b>	<b>8.3</b>	<b>9.3</b>	<b>10.3</b>	<b>11.4</b>	<b>5.6</b>
<b><u>Medium Growth Scenario</u></b>													
441	Motor Vehicles and Parts Dealers	11,091	16,207	18,317	20,483	22,557	0.25	1.0	1.5	1.7	1.9	2.1	1.1
442	Furniture and Home Furnishings Stores	2,277	3,327	3,760	4,204	4,630	0.25	0.2	0.3	0.3	0.4	0.4	0.2
443	Electronics and Appliance Stores	1,468	2,145	2,425	2,712	2,986	0.25	0.1	0.2	0.2	0.2	0.3	0.1
444	Building Materials and Garden Equipment	5,645	8,249	9,323	10,425	11,481	0.25	0.5	0.8	0.9	1.0	1.1	0.5
445	Food and Beverage Stores	6,132	8,960	10,126	11,324	12,470	0.25	0.6	0.8	0.9	1.0	1.1	0.6
446	Health and Personal Care Stores	3,889	5,683	6,423	7,183	7,910	0.25	0.4	0.5	0.6	0.7	0.7	0.4
448	Clothing and Clothing Accessories Stores	4,770	6,970	7,877	8,809	9,700	0.25	0.4	0.6	0.7	0.8	0.9	0.5
451	Sporting Goods, Hobby, Book and Music Stores	1,733	2,532	2,862	3,200	3,524	0.25	0.2	0.2	0.3	0.3	0.3	0.2
452	General Merchandise Stores	14,351	20,970	23,700	26,503	29,186	0.25	1.3	1.9	2.2	2.4	2.7	1.4
453	Miscellaneous Store Retailers	4,163	6,083	6,874	7,688	8,466	0.25	0.4	0.6	0.6	0.7	0.8	0.4
722	Foodservices and Drinking Places	6,734	9,840	11,121	12,436	13,695	0.25	0.6	0.9	1.0	1.1	1.3	0.6
	<b>TOTAL</b>	<b>62,251</b>	<b>90,964</b>	<b>102,807</b>	<b>114,966</b>	<b>126,606</b>		<b>5.7</b>	<b>8.4</b>	<b>9.4</b>	<b>10.6</b>	<b>11.6</b>	<b>5.9</b>
<b><u>Accelerated Growth Scenario</u></b>													
441	Motor Vehicles and Parts Dealers	11,091	16,271	18,455	20,695	23,230	0.25	1.0	1.5	1.7	1.9	2.1	1.1
442	Furniture and Home Furnishings Stores	2,277	3,340	3,788	4,248	4,768	0.25	0.2	0.3	0.3	0.4	0.4	0.2
443	Electronics and Appliance Stores	1,468	2,154	2,443	2,740	3,075	0.25	0.1	0.2	0.2	0.3	0.3	0.1
444	Building Materials and Garden Equipment	5,645	8,281	9,393	10,533	11,824	0.25	0.5	0.8	0.9	1.0	1.1	0.6
445	Food and Beverage Stores	6,132	8,995	10,203	11,441	12,843	0.25	0.6	0.8	0.9	1.1	1.2	0.6
446	Health and Personal Care Stores	3,889	5,705	6,472	7,257	8,146	0.25	0.4	0.5	0.6	0.7	0.7	0.4
448	Clothing and Clothing Accessories Stores	4,770	6,997	7,937	8,900	9,990	0.25	0.4	0.6	0.7	0.8	0.9	0.5
451	Sporting Goods, Hobby, Book and Music Stores	1,733	2,542	2,884	3,233	3,630	0.25	0.2	0.2	0.3	0.3	0.3	0.2
452	General Merchandise Stores	14,351	21,053	23,880	26,777	30,058	0.25	1.3	1.9	2.2	2.5	2.8	1.4
453	Miscellaneous Store Retailers	4,163	6,107	6,927	7,767	8,719	0.25	0.4	0.6	0.6	0.7	0.8	0.4
722	Foodservices and Drinking Places	6,734	9,879	11,205	12,565	14,104	0.25	0.6	0.9	1.0	1.2	1.3	0.7
	<b>TOTAL</b>	<b>62,251</b>	<b>91,323</b>	<b>103,587</b>	<b>116,156</b>	<b>130,386</b>		<b>5.7</b>	<b>8.4</b>	<b>9.5</b>	<b>10.7</b>	<b>12.0</b>	<b>6.3</b>

**EXHIBIT 1.8 (CONTINUED)**  
**COMMERCIAL RETAIL LAND DEMAND, WALLOWA COUNTY URBAN AREAS, (2008-2028)**

LOSTINE		Commercial Retail Space Demand					Avg. F.A.R. 1/	Commercial Retail Land Demand					'08-'28 Change
		2008	2013	2018	2023	2028		2008	2013	2018	2023	2028	
<b><u>Baseline Growth Scenario</u></b>													
441	Motor Vehicles and Parts Dealers	2,509	4,020	4,510	5,016	5,508	0.25	0.2	0.4	0.4	0.5	0.5	0.3
442	Furniture and Home Furnishings Stores	515	825	926	1,030	1,131	0.25	0.0	0.1	0.1	0.1	0.1	0.1
443	Electronics and Appliance Stores	332	532	597	664	729	0.25	0.0	0.0	0.1	0.1	0.1	0.0
444	Building Materials and Garden Equipment	1,277	2,046	2,296	2,553	2,803	0.25	0.1	0.2	0.2	0.2	0.3	0.1
445	Food and Beverage Stores	1,387	2,222	2,494	2,773	3,045	0.25	0.1	0.2	0.2	0.3	0.3	0.2
446	Health and Personal Care Stores	880	1,410	1,582	1,759	1,931	0.25	0.1	0.1	0.1	0.2	0.2	0.1
448	Clothing and Clothing Accessories Stores	1,079	1,729	1,940	2,157	2,369	0.25	0.1	0.2	0.2	0.2	0.2	0.1
451	Sporting Goods, Hobby, Book and Music Stores	392	628	705	784	861	0.25	0.0	0.1	0.1	0.1	0.1	0.0
452	General Merchandise Stores	3,247	5,201	5,836	6,491	7,127	0.25	0.3	0.5	0.5	0.6	0.7	0.4
453	Miscellaneous Store Retailers	942	1,509	1,693	1,883	2,067	0.25	0.1	0.1	0.2	0.2	0.2	0.1
722	Foodservices and Drinking Places	1,524	2,441	2,738	3,046	3,344	0.25	0.1	0.2	0.3	0.3	0.3	0.2
<b>TOTAL</b>		<b>14,084</b>	<b>22,562</b>	<b>25,316</b>	<b>28,155</b>	<b>30,915</b>		<b>1.3</b>	<b>2.1</b>	<b>2.3</b>	<b>2.6</b>	<b>2.8</b>	<b>1.5</b>
<b><u>Medium Growth Scenario</u></b>													
441	Motor Vehicles and Parts Dealers	2,509	4,052	4,579	5,121	5,639	0.25	0.2	0.4	0.4	0.5	0.5	0.3
442	Furniture and Home Furnishings Stores	515	832	940	1,051	1,157	0.25	0.0	0.1	0.1	0.1	0.1	0.1
443	Electronics and Appliance Stores	332	536	606	678	747	0.25	0.0	0.0	0.1	0.1	0.1	0.0
444	Building Materials and Garden Equipment	1,277	2,062	2,331	2,606	2,870	0.25	0.1	0.2	0.2	0.2	0.3	0.1
445	Food and Beverage Stores	1,387	2,240	2,532	2,831	3,118	0.25	0.1	0.2	0.2	0.3	0.3	0.2
446	Health and Personal Care Stores	880	1,421	1,606	1,796	1,977	0.25	0.1	0.1	0.1	0.2	0.2	0.1
448	Clothing and Clothing Accessories Stores	1,079	1,742	1,969	2,202	2,425	0.25	0.1	0.2	0.2	0.2	0.2	0.1
451	Sporting Goods, Hobby, Book and Music Stores	392	633	715	800	881	0.25	0.0	0.1	0.1	0.1	0.1	0.0
452	General Merchandise Stores	3,247	5,242	5,925	6,626	7,297	0.25	0.3	0.5	0.5	0.6	0.7	0.4
453	Miscellaneous Store Retailers	942	1,521	1,719	1,922	2,116	0.25	0.1	0.1	0.2	0.2	0.2	0.1
722	Foodservices and Drinking Places	1,524	2,460	2,780	3,109	3,424	0.25	0.1	0.2	0.3	0.3	0.3	0.2
<b>TOTAL</b>		<b>14,084</b>	<b>22,741</b>	<b>25,702</b>	<b>28,742</b>	<b>31,651</b>		<b>1.3</b>	<b>2.1</b>	<b>2.4</b>	<b>2.6</b>	<b>2.9</b>	<b>1.6</b>
<b><u>Accelerated Growth Scenario</u></b>													
441	Motor Vehicles and Parts Dealers	2,509	4,068	4,614	5,174	5,808	0.25	0.2	0.4	0.4	0.5	0.5	0.3
442	Furniture and Home Furnishings Stores	515	835	947	1,062	1,192	0.25	0.0	0.1	0.1	0.1	0.1	0.1
443	Electronics and Appliance Stores	332	538	611	685	769	0.25	0.0	0.0	0.1	0.1	0.1	0.0
444	Building Materials and Garden Equipment	1,277	2,070	2,348	2,633	2,956	0.25	0.1	0.2	0.2	0.2	0.3	0.2
445	Food and Beverage Stores	1,387	2,249	2,551	2,860	3,211	0.25	0.1	0.2	0.2	0.3	0.3	0.2
446	Health and Personal Care Stores	880	1,426	1,618	1,814	2,036	0.25	0.1	0.1	0.1	0.2	0.2	0.1
448	Clothing and Clothing Accessories Stores	1,079	1,749	1,984	2,225	2,498	0.25	0.1	0.2	0.2	0.2	0.2	0.1
451	Sporting Goods, Hobby, Book and Music Stores	392	636	721	808	907	0.25	0.0	0.1	0.1	0.1	0.1	0.0
452	General Merchandise Stores	3,247	5,263	5,970	6,694	7,514	0.25	0.3	0.5	0.5	0.6	0.7	0.4
453	Miscellaneous Store Retailers	942	1,527	1,732	1,942	2,180	0.25	0.1	0.1	0.2	0.2	0.2	0.1
722	Foodservices and Drinking Places	1,524	2,470	2,801	3,141	3,526	0.25	0.1	0.2	0.3	0.3	0.3	0.2
<b>TOTAL</b>		<b>14,084</b>	<b>22,831</b>	<b>25,897</b>	<b>29,039</b>	<b>32,596</b>		<b>1.3</b>	<b>2.1</b>	<b>2.4</b>	<b>2.7</b>	<b>3.0</b>	<b>1.7</b>

**EXHIBIT 1.8 (CONTINUED)**  
**COMMERCIAL RETAIL LAND DEMAND, WALLOWA COUNTY URBAN AREAS, (2008-2028)**

WALLOWA		Commercial Retail Space Demand					Avg. F.A.R. 1/	Commercial Retail Land Demand					'08-'28 Change
		2008	2013	2018	2023	2028		2008	2013	2018	2023	2028	
<b><u>Baseline Growth Scenario</u></b>													
441	Motor Vehicles and Parts Dealers	8,933	12,059	13,531	15,049	16,524	0.25	0.8	1.1	1.2	1.4	1.5	0.7
442	Furniture and Home Furnishings Stores	1,834	2,475	2,777	3,089	3,392	0.25	0.2	0.2	0.3	0.3	0.3	0.1
443	Electronics and Appliance Stores	1,183	1,596	1,791	1,992	2,188	0.25	0.1	0.1	0.2	0.2	0.2	0.1
444	Building Materials and Garden Equipment	4,547	6,138	6,887	7,659	8,410	0.25	0.4	0.6	0.6	0.7	0.8	0.4
445	Food and Beverage Stores	4,939	6,667	7,481	8,320	9,135	0.25	0.5	0.6	0.7	0.8	0.8	0.4
446	Health and Personal Care Stores	3,132	4,229	4,745	5,277	5,794	0.25	0.3	0.4	0.4	0.5	0.5	0.2
448	Clothing and Clothing Accessories Stores	3,842	5,186	5,819	6,472	7,106	0.25	0.4	0.5	0.5	0.6	0.7	0.3
451	Sporting Goods, Hobby, Book and Music Stores	1,396	1,884	2,114	2,351	2,582	0.25	0.1	0.2	0.2	0.2	0.2	0.1
452	General Merchandise Stores	11,558	15,604	17,508	19,472	21,381	0.25	1.1	1.4	1.6	1.8	2.0	0.9
453	Miscellaneous Store Retailers	3,353	4,526	5,078	5,648	6,202	0.25	0.3	0.4	0.5	0.5	0.6	0.3
722	Foodservices and Drinking Places	5,424	7,322	8,215	9,137	10,033	0.25	0.5	0.7	0.8	0.8	0.9	0.4
<b>TOTAL</b>		<b>50,139</b>	<b>67,686</b>	<b>75,947</b>	<b>84,466</b>	<b>92,746</b>		<b>4.6</b>	<b>6.2</b>	<b>7.0</b>	<b>7.8</b>	<b>8.5</b>	<b>3.9</b>
<b><u>Medium Growth Scenario</u></b>													
441	Motor Vehicles and Parts Dealers	8,933	12,155	13,737	15,362	16,917	0.25	0.8	1.1	1.3	1.4	1.6	0.7
442	Furniture and Home Furnishings Stores	1,834	2,495	2,820	3,153	3,472	0.25	0.2	0.2	0.3	0.3	0.3	0.2
443	Electronics and Appliance Stores	1,183	1,609	1,819	2,034	2,240	0.25	0.1	0.1	0.2	0.2	0.2	0.1
444	Building Materials and Garden Equipment	4,547	6,187	6,992	7,819	8,611	0.25	0.4	0.6	0.6	0.7	0.8	0.4
445	Food and Beverage Stores	4,939	6,720	7,595	8,493	9,353	0.25	0.5	0.6	0.7	0.8	0.9	0.4
446	Health and Personal Care Stores	3,132	4,262	4,817	5,387	5,932	0.25	0.3	0.4	0.4	0.5	0.5	0.3
448	Clothing and Clothing Accessories Stores	3,842	5,227	5,908	6,606	7,275	0.25	0.4	0.5	0.5	0.6	0.7	0.3
451	Sporting Goods, Hobby, Book and Music Stores	1,396	1,899	2,146	2,400	2,643	0.25	0.1	0.2	0.2	0.2	0.2	0.1
452	General Merchandise Stores	11,558	15,727	17,775	19,877	21,890	0.25	1.1	1.4	1.6	1.8	2.0	0.9
453	Miscellaneous Store Retailers	3,353	4,562	5,156	5,766	6,349	0.25	0.3	0.4	0.5	0.5	0.6	0.3
722	Foodservices and Drinking Places	5,424	7,380	8,341	9,327	10,272	0.25	0.5	0.7	0.8	0.9	0.9	0.4
<b>TOTAL</b>		<b>50,139</b>	<b>68,223</b>	<b>77,105</b>	<b>86,225</b>	<b>94,954</b>		<b>4.6</b>	<b>6.3</b>	<b>7.1</b>	<b>7.9</b>	<b>8.7</b>	<b>4.1</b>
<b><u>Accelerated Growth Scenario</u></b>													
441	Motor Vehicles and Parts Dealers	8,933	12,203	13,842	15,521	17,423	0.25	0.8	1.1	1.3	1.4	1.6	0.8
442	Furniture and Home Furnishings Stores	1,834	2,505	2,841	3,186	3,576	0.25	0.2	0.2	0.3	0.3	0.3	0.2
443	Electronics and Appliance Stores	1,183	1,615	1,832	2,055	2,306	0.25	0.1	0.1	0.2	0.2	0.2	0.1
444	Building Materials and Garden Equipment	4,547	6,211	7,045	7,900	8,868	0.25	0.4	0.6	0.6	0.7	0.8	0.4
445	Food and Beverage Stores	4,939	6,746	7,652	8,581	9,632	0.25	0.5	0.6	0.7	0.8	0.9	0.4
446	Health and Personal Care Stores	3,132	4,279	4,854	5,443	6,109	0.25	0.3	0.4	0.4	0.5	0.6	0.3
448	Clothing and Clothing Accessories Stores	3,842	5,248	5,953	6,675	7,493	0.25	0.4	0.5	0.5	0.6	0.7	0.3
451	Sporting Goods, Hobby, Book and Music Stores	1,396	1,907	2,163	2,425	2,722	0.25	0.1	0.2	0.2	0.2	0.2	0.1
452	General Merchandise Stores	11,558	15,790	17,910	20,083	22,543	0.25	1.1	1.4	1.6	1.8	2.1	1.0
453	Miscellaneous Store Retailers	3,353	4,580	5,195	5,825	6,539	0.25	0.3	0.4	0.5	0.5	0.6	0.3
722	Foodservices and Drinking Places	5,424	7,409	8,404	9,424	10,578	0.25	0.5	0.7	0.8	0.9	1.0	0.5
<b>TOTAL</b>		<b>50,139</b>	<b>68,493</b>	<b>77,690</b>	<b>87,117</b>	<b>97,789</b>		<b>4.6</b>	<b>6.3</b>	<b>7.1</b>	<b>8.0</b>	<b>9.0</b>	<b>4.4</b>

### EXHIBIT 1.9

#### UNINCORPORATED RESIDENT AND TOURISM DRIVEN COMMERCIAL LAND DEMAND

Scenario/ Urban Area	Unincorporated Resident & Tourism Driven Commercial Land Demand					'08-'28 Change
	2008	2013	2018	2023	2028	
<b><u>Baseline Growth Scenario</u></b>						
Enterprise	6.8	7.8	8.9	10.1	11.4	4.58
Joseph	7.0	8.3	9.7	11.4	13.3	6.29
Lostine	1.1	1.2	1.4	1.6	1.8	0.74
Wallowa	1.7	2.0	2.3	2.6	3.0	1.25
<b>Total</b>	<b>16.7</b>	<b>19.3</b>	<b>22.3</b>	<b>25.7</b>	<b>29.5</b>	<b>12.9</b>
<b><u>Medium Growth Scenario</u></b>						
Enterprise	6.8	7.9	9.2	10.5	12.0	5.22
Joseph	7.0	8.4	10.2	12.2	14.7	7.65
Lostine	1.1	1.3	1.5	1.7	1.9	0.85
Wallowa	1.7	2.0	2.4	2.8	3.2	1.45
<b>Total</b>	<b>16.7</b>	<b>19.6</b>	<b>23.2</b>	<b>27.2</b>	<b>31.8</b>	<b>15.2</b>
<b><u>Accelerated Growth Scenario</u></b>						
Enterprise	6.8	7.9	9.2	10.6	12.3	5.47
Joseph	7.0	8.5	10.2	12.3	14.8	7.78
Lostine	1.1	1.3	1.5	1.7	2.0	0.88
Wallowa	1.7	2.0	2.4	2.8	3.3	1.51
<b>Total</b>	<b>16.7</b>	<b>19.7</b>	<b>23.3</b>	<b>27.4</b>	<b>32.3</b>	<b>15.6</b>