COLUMBIA RIVER ECONOMIC DEVELOPMENT COUNCIL

2025 Long Term Employment Activity Centers Prospectus

Final Report

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Key Findings

Stakeholder Engagement

The Columbia River Economic Development Council (CREDC) and Community Attributes, Inc. (CAI) conducted a comprehensive stakeholder engagement process from May to June 2025, to assess employment land opportunities across Clark County. Nine group stakeholder interviews and one group working session were held with local jurisdictions, utilities, ports, tribes, and transportation agencies to review 2025 project findings and advise on an integrated employment lands strategy looking 10-40 years into the future.

Long Term Prospectus for Employment Center Location

Following previous employment land studies in 2016 and 2019, Clark County faces a critical shortage of viable employment land as much of the previously identified supply has been developed or constrained, forcing planners to look beyond existing Urban Growth Area (UGA) boundaries for future opportunities. This 2025 study by CREDC and Community Attributes Inc. takes a long-term perspective, identifying 55 potential Employment Activity Centers totaling 6,216 gross acres (2,400 unconstrained acres) and categorizing them into Near Term (26 sites), Mid Term (18 sites), and Long Term (5 sites) opportunities based on development timeframes of 1-3, 5-10, and 10-20 years respectively.

The study methodology employed a comprehensive Scoring Matrix evaluating sites across six categories: Fundamentals, Transportation, Power Network, Broadband, Water, and Sanitary Sewer infrastructure, with scores up to 100 points total. This assessment was informed by detailed research into Clark County's target industries (computers & electronics, software, clean technology, advanced manufacturing, and life sciences) and their specific infrastructure requirements, including substantial electrical capacity (2-11.5 MW), high-speed broadband, and proximity to transportation networks. The analysis revealed that optimal sites require 20+ acres with minimal environmental constraints, single ownership when possible, and access to utilities and transportation infrastructure.

The study's findings show significant changes since the 2020 inventory, with 12 of the original 42 sites now mostly or completely developed and only 17 sites (40%) remaining at full capacity. The top-scoring sites include Terminal 5 (68/100), Lahti (67/100), and Lagler (65/100), primarily Near Term opportunities with strong infrastructure access. Additionally, the study identified six potential conversion sites within existing UGAs that could be repositioned for employment use, including the Cadman Materials quarry site, Clark County Fairgrounds, and Tri Mountain Golf Course, suggesting

opportunities to optimize existing underutilized properties for future industrial development.

Obstacles and Opportunities for Employment Lands

Clark County faces significant obstacles to employment land development including a lack of suitable supply within existing UGAs, competing priorities that favor residential over industrial development, and infrastructure gaps that limit site readiness for new employment centers. However, the county has strong opportunities to leverage its advanced manufacturing clusters, pursue electrification leadership, and benefit from planned transportation network expansions and flexible zoning updates that could enable a broader range of employment uses in certain zones.

Strategies for Preservation, Protection, & Redevelopment

CREDC and its partners recommend several coordinated strategies to catalyze employment land development in Clark County, including maintaining focus on employment "centers" rather than scattered sites, establishing rural industrial land banks outside UGAs as allowed by state law, and creating a shovel-ready site program similar to Detroit's successful model. Additional priorities include pre-permitting sites, strategically planning for sand and gravel pit transitions to industrial use, securing diverse infrastructure funding through TIF districts and federal grants, reducing permitting timelines to meet new state requirements, and incentivizing large parcel assembly through policy tools like density bonuses and streamlined processes.

Introduction

Background and Purpose

The Columbia River Economic Development Council (CREDC) commissioned this comprehensive study to address a critical challenge facing Clark County, Washington: the rapid consumption and conversion of the most viable and competitive commercial and industrial lands in a transforming region. Clark County's diverse economy—spanning advanced manufacturing, technology-enhanced production, life sciences, software, clean tech, and professional services—is increasingly vulnerable as physical space to accommodate business growth faces acute pressures to convert to other uses—especially including residential given recent shifts in state housing planning requirements. CREDC's role as a regional economic development leader is to ensure Clark County remains economically competitive and well-resourced to attract and retain major employers – including preserving existing industrial spaces and

identifying and advocating for future employment lands in ongoing growth planning.

The project's primary purpose is to identify parcels of land that can be aggregated into larger employment land sites, preserving them for industrial development to support the existing manufacturing business base while inviting new business activity. This effort aims to optimize Growth Management Act planning opportunities and secure a responsible and balanced tax base for the region. Funding was provided by the Economic Development Administration with local matching funds from Clark County, reflecting the multi-level commitment to addressing this economic development challenge.

Methodology

The study employed a systematic approach using a 40-year planning horizon to identify viable employment centers. The methodology included establishing transparent criteria for ranking site convertibility likelihood and viability based on national development industry standards and local expert consultation. Key evaluation factors included proximity to transportation and population centers, land/building conversion cost competitiveness, and access to utilities.

The research process involved comprehensive stakeholder interviews and data capture to validate findings and ensure local relevance. Sites were analyzed in relation to current Urban Growth Area (UGA) boundaries, urban reserves, and existing zoning designations. Special attention was given to identifying major sites within the UGA that could be reconfigured or rezoned to optimize business and employment purposes, recognizing political and budgetary constraints on UGA expansion.

All data was structured for integration with CREDC's electronic mapping tool, providing accessible visualization of industrial and commercial land availability. The methodology documentation captured both data collection processes and stakeholder consultation protocols to ensure transparency and reproducibility for future planning efforts.

Organization of Report

This report is presented as follows:

- **Stakeholder Engagement.** An overview and synthesis of all stakeholder engagement in support of this work.
- **Long Term Prospectus for Employment Center Locations.** A summary of findings of the core analysis at the heart of this study – a long-term prospectus for large, well-located and well-served employment lands sites as of 2025, with a time horizon of 40 years. Sites considered

included Employment Activity Centers both within and outside the current UGA boundaries, as well as Top Prospects for Conversion to Employment Land.

- **Obstacles and Opportunities for Employment Lands.** This section is a summary of obstacles and opportunities for Clark County's employment lands supply gained throughout the project.
- **Strategies for Preservation, Protection & Redevelopment.** This section presents a number of priority strategies to strengthen the employment lands supply for economic development in Clark County based on analyses, research, and stakeholder engagement.

Stakeholder Engagement

The Columbia River Economic Development Council (CREDC) and Community Attributes, Inc. (CAI) conducted a comprehensive stakeholder engagement process from May to June 2025, to assess employment land opportunities across Clark County. Nine group stakeholder interviews and one group working session were held with local jurisdictions, utilities, ports, tribes, and transportation agencies to review 2025 project findings and advise on an integrated employment lands strategy looking 10-40 years into the future.

Key Findings

Land Availability Crisis: Nearly 40% of employment land opportunities identified in the 2019 study have been partially or fully developed, with rapid subscription and conversion to other uses, including residential, threatening the region's economic diversity and tax base. This dwindling supply of large, well-located, and viable employment lands sites has accelerated the urgency for strategic employment land planning.

Infrastructure as Development Driver: Utility capacity, particularly electrical transmission and sewer infrastructure, emerged as the primary constraint for employment site viability. New legislation (House Bill 1253) expands Public Utility Districts' ability to partner with third parties on infrastructure investments, creating new opportunities for coordinated development.

Mixed-Use Evolution: Traditional industrial zoning has seen an evolution toward more flexible mixed-use designations like ECX (Employment Center Mixed Use) and Regional Activity Centers, allowing employment, residential, and commercial uses while often excluding heavy industrial activities. While

somewhat a reflection of market preferences and desires to maximize land use efficiency, the shift has had negative impacts on siting potential and variety for industrial uses in Clark County.

Priority Employment Sites

The engagement process identified several high-priority sites across the region:

Vancouver Area: Numerous large Port of Vancouver properties, including Columbia Gateway, Terminal 5, and the Hickey Site remain available for industrial development. The Lagler, Anderson Dairy, Section 30 (transitioning uses), Columbia Business Center (single ownership seeking rezoning), and Quad sites (employment-ready but awaiting development interest) represent near- and mid-term opportunities with varying infrastructure needs.

Camas-Washougal: Parcels west of Grove Field, and the 160-acre Nevin property just outside the Urban Growth Area emerged as promising mid-term site opportunities, with minimal constraints and strong development potential. Johnston Dairy is under contract for mixed-use master planning, while the greater Georgia Pacific mill site requires remediation but offers long-term employment potential.

Small Cities: Ridgefield's PeaceHealth, Lutzenberg, Lahti, and Boschma family parcels near Clark College present near-term employment opportunities, while La Center's Cowlitz Tribe-owned and adjacent parcels at the highway junction offer significant long-term potential pending tribal economic development plans. Extensive mid-term opportunities may exist south of Ridgefield around the intersection of I-5 and 219th. Battleground retains three near-term opportunities and a large proposed expansion west to Dollars Corner.

Infrastructure Coordination

Electrical Systems: Clark Public Utilities identified North Camas and Northern Ridgefield areas for potential substation expansion. Large industrial loads requiring 10+ megawatts typically need dedicated substations, making utility coordination essential for site planning.

Transportation Networks: The Regional Transportation Council is updating freight route designations and C-Tran is developing a 2045 system plan with potential expansion north of Lacamas Lake, which would benefit North Shore area employment lands.

Sewer Infrastructure: Significant expansion is planned along the 179th corridor and BPA corridor areas over the next 5-8 years, opening new development possibilities in coordination with county projects.

Strategic Recommendations

Proactive Infrastructure Investment: Stakeholders emphasized the need for joint ventures, credits, and risk-sharing mechanisms to encourage utility infrastructure investment ahead of development demand.

Land Use Optimization: Discussions included relocating non-industrial uses like fairgrounds to more appropriate locations, freeing high-value infrastructure corridors for employment uses and maximizing the finite Urban Growth Area.

Regional Coordination: The engagement process highlighted the importance of integrating city, county, utility, and transportation planning to create employment-ready sites that support economic diversification and attract younger talent.

Implementation Tools

A **digital mapping platform** – the Clark County 2025 Employment Lands Explorer – has been developed to overlay infrastructure capacity, policy constraints, and development opportunities, allowing stakeholders to visualize employment land potential and coordinate investments. The platform will include a "story map" integrating data with narrative explanations to guide decision-making.

The final deliverable includes recommendations for the Employment Lands Committee and broader CREDC group, with ongoing stakeholder input to refine site selections and infrastructure coordination strategies.

To access this Digital Mapping Platform, please contact CREDC's Vice President of Business Development, Clint Hendricks, at clint@credc.org

Long Term Prospectus for Employment Center Locations

On the heels of employment land studies in 2016 and 2019, much of the county's supply of viable land has been subscribed with much remaining acreage constrained or less suitable. This study found that – looking ahead – Clark County must begin to proactively plan – now – for a viable supply of land for economic growth in the future as most opportunities now lie outside existing UGA boundaries.

In 2019, CREDC contracted with Community Attributes, Inc. (CAI) to update its 2016 Employment Lands Study and Inventory. At that time, we conducted a detailed survey of potential industrial sites across the county that, at the time: lay within UGA boundaries, were greater than 20 contiguous acres in size, and were zoned for employment uses. We conducted extensive stakeholder engagement to find out which sites were really available and which had other constraints such as conflicting land use applications, entitlements, land banking or other factors. Finally, for the remaining sites - 42 in all - we conducted a detailed assessment of site by site configuration, environmental, infrastructure, transportation, market, and ownership factors resulting in grades and an overall tiering of sites by developability timeframe. The result was an online webmap and summary graphic representing these 42 sites by Tier.

Since that time, **many of the sites we identified have either been developed (partially or fully)** or have been found to have **additional constraints** that may render their conversion to employment uses more challenging or even unlikely. It became apparent that the county's **supply of employment lands could become a significant obstacle to economic development**.

Thus, CREDC and its partners have again partnered with CAI to, this time around, provide a critical assessment of industrial land site needs that **support a balance between residential and business site development over the long-term for Clark County**. As such, we are taking a downfield look at the potential suitability of sites for employment land use location to support economic development in Clark County not just in coming years, but in coming decades. As such, we are looking further afield including lands adjacent to existing UGA boundaries in areas of planned community expansion, and beyond to lands that might make sense for consideration far into the future based on the needs of modern industry and the location and site attributes of the land itself.

Methodology

In order to assess the suitability of such sites - what we're referring to as potential **Employment Activity Centers** - we have this time around codified objective site criteria based on research and extensive experience conducting industrial land inventories in Washington state and across the country. This research has been gathered into a **Profile of Modern Industrial Typologies, Needs, and Sectors in Clark County, WA**, summarized in the subsequent section (and presented in full in Appendix B).

The resulting understanding of site needs and objective criteria have been organized to generate a detailed site-by-site assessment of characteristics around **size, configuration, constraints, ownership, valuation, tax status**

and other factors, as well as utility, broadband, and transportation networks. It also involves understanding **land use planning, entitlement processes, permitting, or proposed developments** that might be underway on sites we're evaluating for employment lands suitability potential.

The criteria we've developed as a result have been used to create a **Scoring Matrix**. The Matrix assigns values to raw data based on parameters that are adjustable to different industry needs. Then, the matrix evaluates individual factors and combines them to score categories of assets and generates an overall score for the site. This tool is dynamic in that any changes made to assumptions and score weighting are automatically applied and reflected in resulting scoring outputs. This tool represents the logic behind the site profiles and visualization of our corresponding **Clark County 2025 Employment Lands Explorer.**

Modern Industrial Profile

Clark County, Washington has emerged as a dynamic industrial hub with a diverse economic base spanning advanced manufacturing, technology-enhanced production, life sciences, software development, clean technology, and professional services. In order to develop a set of **objective criteria** by which to assess the suitability of Clark County employment lands now and into the future against other competing land use values, CAI researched and developed a profile of modern industrial typologies, needs, and sectors in Clark County as of 2025.

The full profile can be found in **Appendix B**. The following section summarizes findings from this report and was used to develop the scoring criteria in the following section.

Target Industries

Computers & Electronics

Clark County's computers and electronics sector builds on a strong legacy cluster including Logitech, TSMC, Silicon Forest Electronics, and SEH America. The Greater Portland region demonstrates exceptional specialization with 6.5 times the national concentration of hardware engineers and 16 times the semiconductor workforce. Major facilities include Analog Devices' Camas semiconductor plant (receiving CHIPS Act funding), TSMC's first U.S. factory operational since 1998, and SEH America's 300mm wafer production facility employing over 850 workers.

Software

The software sector leverages Clark County's quality of life and talent access, developing specializations in network design, web development, and fintech. Companies like ZoomInfo and Home Depot's QuoteCenter (a 45,000 square foot

facility in Quad Industrial Park) exemplify the sector's growth, requiring flex buildings with emphasis on data storage and administrative functions rather than traditional warehouse space.

Clean Technology

With U.S. solar power growing 15% annually (2017-2022) and electric vehicle sales doubling in 2021, Clark County's clean tech sector benefits from its electronics foundation, available lands, and skilled workforce. Key companies include Pacific Energy Concepts (energy optimization systems) and CHC Columbia Hydronics (hydronic equipment supplier across the Pacific Northwest with 150+ employees).

Technology Enhanced Manufacturing

Southwest Washington maintains robust metals and machinery manufacturing through companies like Columbia Machine Inc. (serving 100+ countries) and Thompson Metal Fabrication (269,000 sq ft with Columbia River access). The region has sustained growth despite national production declines through advanced specializations in motor manufacturing, pump production, and sophisticated steel fabrication.

Life Sciences

The greater Portland-Vancouver region's life sciences industry ranks as a top 10 U.S. cluster, featuring companies like AbSci, Twist Bioscience, and Genentech. Clark County's competitive advantages center on biotech manufacturing. AbSci operates a 77,000 square foot facility with 200 employees valued at nearly $2 billion, while Molecular Testing Labs provides specialized molecular diagnostic services.

Modern Industrial Building Typologies

Flex Facilities

Industrial flex facilities combine office, industrial, lab, and commercial activities in spaces under 100,000 square feet. Typically zoned light industrial, these buildings feature attractive exteriors with enhanced landscaping and minimal loading dock presence. Southwest Washington tech companies frequently use these spaces for testing and assembly operations.

Multi-Tenant Industrial

These buildings house diverse tenants in spaces typically under 20,000 square feet per tenant, with 16-24 foot ceilings. Popular with investors for tenant diversity, they're often located closer to city centers and serve as spokes for larger companies' hub operations in outlying areas.

Manufacturing Facilities

Light manufacturing buildings typically reach 300,000 square feet with 14-24 foot clear heights, combining manufacturing, warehouse, and office functions. Heavy manufacturing facilities range from 300,000 square feet to over one million, featuring 90% manufacturing space, 60-foot ceilings, rail access, and specialized infrastructure for aerospace, energy, and tech firms.

Specialized Facilities

Data centers average 150,000 square feet with extremely high electrical power requirements and specialized cooling systems. Biolabs require specific infrastructure including water access for sterilization, direct exhaust ventilation, custom gas and liquid pipes, and specialized heating/cooling capabilities. These facilities prioritize anonymity for security rather than architectural prominence.

Warehouse & Distribution

The most common industrial building type, ranging from 20,000 square foot warehouses to million-plus square foot distribution centers. Vancouver has implemented restrictions limiting warehouses over 250,000 square feet to Heavy Industrial zones with enhanced standards, responding to concerns about land consumption and traffic impacts.

Industrial Demand Profile

Clark County's industrial inventory totals 875 buildings with 29.98 million square feet of rentable space as of Q2 2025. Key demand indicators include:

- **Strong Growth**: 15% building increase over the past decade with 31% space growth
- **Tight Market**: 5.3% vacancy rate (5-10% considered healthy) with consistently high occupancy rates above 95%
- **Manufacturing Shortage**: Only 44,000 square feet of vacant manufacturing space available (1.4% vacancy rate)
- **Rising Rents**: Triple net rents increased 26% over the past decade to $11.56 per square foot
- **Construction Activity**: Significant recent delivery trends with Clark County outpacing Washington state in new construction

Infrastructure Requirements

Electrical Power

Industrial facilities require substantial electrical capacity with standard demands of 2-11.5 MW, three-phase power at 4,160-12,000 volts, and amperage ranging from 2,000 amps (under 300,000 sq ft) to 10,000 amps (500,000+ sq ft facilities).

Utilities

Standard requirements include 9-13 MCF/hour natural gas service, 50,000 gallons per day water demand at 40-60 PSI, 40,000 gallons per day wastewater capacity, and business-class broadband with minimum 1 Gbps download speeds.

Transportation

Critical transportation needs include proximity to freeway access (1-3 miles optimal), freight rail connections (BNSF, Union Pacific, and Chelatchie Prairie Railroad), truck route access, and parking ratios ranging from 1 space per 1,500 sq ft (warehouses) to 1 space per 500 sq ft (general industrial).

Siting and Location Needs

Physical Requirements

Optimal sites feature 20+ acre size with square or rectangular configuration, less than 5% grade, adequate soil conditions, and minimal environmental constraints. Single ownership facilitates development, while multi-parcel assemblies require complex negotiations and potential zoning changes.

Environmental Considerations

Sites must avoid critical areas including wetlands, floodplains, habitat conservation areas, steep slopes, and geologically hazardous areas. Clark County's Vacant Buildable Lands Model found only 1,114 net acres of buildable industrial land supply, with analysis suggesting constrained area assumptions may need revision based on actual development patterns.

Proximity Factors

Locations should provide access to consumer and business markets, workforce within 30-60 minute commutes, and proximity to Portland's larger metropolitan area. Clark County's unique position benefits from cross-border commuting patterns and access to diverse labor pools.

Conclusion

Clark County's industrial sector demonstrates strong fundamentals across target industries, supported by diverse building typologies meeting evolving business needs. The tight industrial real estate market, growing demand across sectors, and substantial infrastructure requirements underscore the importance of strategic planning for employment land preservation and development. Success depends on maintaining the region's competitive advantages while addressing infrastructure capacity, land availability, and workforce development needs.

Site Assessment Scoring Criteria

The **Scoring Matrix** developed to assess site suitability for this work is organized into seven categories for analysis, each including multiple individual metrics. However, only six of these categories are scored (the General category if for informational purposes only):

- **General (unscored)**
- **Fundamentals**
- **Transportation**
- **Power Network**
- **Broadband**
- **Water**
- **Sanitary Sewer**

The informational **General** category reflects basic information on the site and parcels comprising the site including jurisdiction, number of parcels, gross acreage, unconstrained acreage, and zoning.

The other six groupings are scored. The **Fundamentals** category includes summarized parcel data, such as improvement value ratio (the ratio of assessor's improvement value for buildings on the site to parcel area expressed in dollars per square foot of area), average parcel size, and number of parcel owners, for parcels that comprise the site. It also includes coverage metrics like unconstrained and current use program area, as well as proximity metrics such as the distance to an urban growth area and urban industrial reserve/FDRU overlays. **Coverage** refers to how much of a certain feature is present within the site area (measured in miles or acres), while **proximity** refers to the distance from the center of the site to the nearest feature (measured in miles). The **Transportation** category evaluates rail and truck infrastructure in terms of both coverage and proximity and considers drivetime to the nearest highway ramp and distance to public transit options, in addition to proximity to truck routes and freight rail. The **Power Network** category examines coverage and proximity of Clark Public Utilities power infrastructure (including power poles, lines, and substations), while the **Broadband** category evaluates average download speeds as measured by the Ookla speed test platform for the immediate area. The **Water** and **Sanitary Sewer** categories analyze both coverage and proximity to Clark Public Utility and Clark Regional Wastewater District water and sewer infrastructure including water and sewer mains and laterals. For informational purposes, the water district and sewer district that the site lies within is also presented.

The Scoring Matrix utilizes adjustable **assumptions** to translate raw proximity and coverage figures into useful values, such as very near, near, or far; or low, medium, and high coverage. The matrix assumptions are grouped into three categories: core, coverage, and proximity. Core assumptions include parcel-related data from the Fundamentals category, while the coverage and

proximity sections compile data from all six scored categories. For each metric, assumptions may be defined by setting an operator, a data threshold, and a corresponding label that guides how the raw data is interpreted. These assumptions can be adjusted to reflect differing needs associated with specific industries if desired but have been set by default for the platform to evaluate generalized industrial use based on our modern industrial profile research findings.

Finally, values assigned to the raw data via assumptions are converted to individual metric **scores** and combined into an overall site score out of a total of 100 possible points. Each value label is used to assign a score to the metric for each site. Category scores are calculated by summing the metric scores for each site, and the overall site score is the total of all category scores for that site. Scores for individual metric values are also dynamic and can be adjusted to "weight" various factors differently depending on industry needs. Detailed instructions on how to use the Scoring Matrix dynamically are included in the Contents tab of the tool.

2025 Employment Activity Center Inventory

This section summarizes the results of the 2025 employment land sites inventory, assessment, and scoring at the heart of the Clark County 2025 Employment Lands Explorer.

To access this Digital Employment Lands Explorer Platform, please contact CREDC's Vice President of Business Development, Clint Hendricks, at clint@credc.org

Summary of Inventory

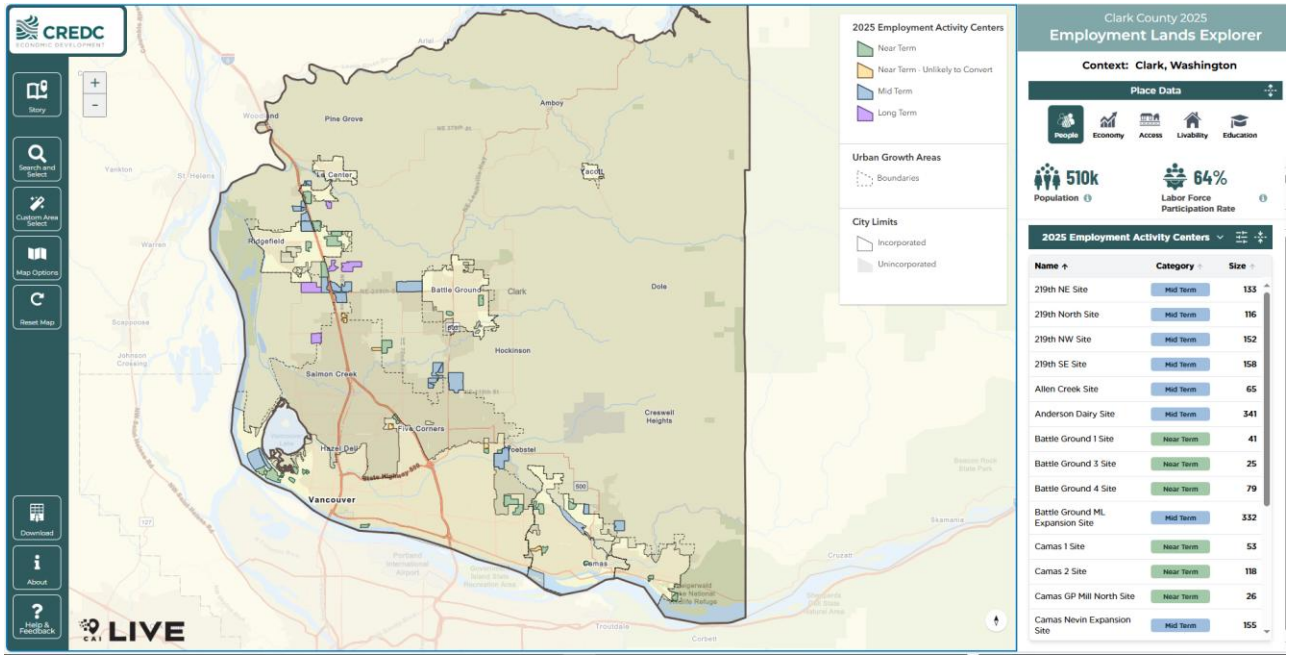
This study resulted in the identification, assessment, and scoring of **55 potential Employment Activity Center sites** located across Clark County. Each site was over 20 gross acres in size and were located within city limits and / or Urban Growth Areas (UGAs), adjacent to UGAs and / or within Urban Industrial Reserve overlays, and outside these areas altogether. These 56 sites were organized into four categories:

- **Near Term Opportunities.** These were generally sites located within city or UGA boundaries that were identified in the 2020 inventory and remained developable – plus some newly identified sites – with lower barriers to development and good access to existing transportation and utility networks that could conceivably develop within 1-3 years.
- **Near Term – Unlikely to Convert.** These were sites that remained undeveloped from the 2020 inventory but that, in the interim, have been found to have additional constraints that could

render them more unlikely to develop than other Near Term Opportunities.

– **Mid Term Opportunities.** These were generally sites located immediately adjacent to UGA boundaries and which lay within overlays indicating their consideration for future employment use in local and County comprehensive planning processes – including Urban Industrial Reserve overlays and Freight Rail Dependent Use (FRDU) overlays. These sites enjoy fair proximity to existing or planned transportation and infrastructure networks, and good land fundamentals for potential employment use; such sites could conceivably be converted in a mid term time frame from 5-10 years.

– **Long Term Opportunities.** This category of sites was located further afield and generally not within existing overlays, but still near to UGA boundaries and existing or planned transportation and infrastructure networks, and with good land fundamentals for potential employment use; such sites could conceivably be converted in a long term time frame from 10-20 years.



Source: Clark County 2025 Employment Lands Explorer, Community Attributes, 2025.

The inventory found six Near Term – Unlikely to convert sites; 26 Near Term sites; 18 Mid Term sites; and 5 Long Term sites. Discounting six Near Term – Unlikely to Convert sites, the remaining 50 identified Employment Activity Centers comprising Near, Mid, and Long Term Opportunities represented a total of **6,216 gross acres**, but only **2,400 unconstrained acres** (34% of gross acreage). While Near Term sites were almost entirely located within existing

commercial, industrial, and employment zoning categories within UGAs, the Mid and Long Term sites were often located within County Agricultural (such as AG-20) and Rural Residential (such as RR-5) zones – though Mid Term sites concurrently lay within employment overlays on those zones.

A total of 14 of 56 sites (25%) are single-owner sites, requiring less site aggregation and typically aggregate fewer tax lots. 23 of 56 sites (or 50%) are greater than 100 gross acres in size.

Assessment and Scoring Results

Sites in the inventory were scored with a **Scoring Matrix** based upon objective criteria described in detail in the previous section. The resulting scores were out of a total of 100, with the following total possible scores by sub-grouping:

- **Fundamentals – 53 max possible score.** Individual site metrics scored include value ratio (improvement value per square foot of land area), average parcel size, number of owners, unconstrained acreage, UGA proximity, and UR-20 / FRDU overlay proximity.
- **Transportation– 24 max possible score.** Individual site metrics scored include freight rail proximity and coverage, truck routes coverage, drivetime to highway ramps, and transit proximity.
- **Power Network– 6 max possible score.** Individual site metrics scored include proximity to and coverage of CPU and BPA power infrastructure including distribution lines, power poles, and substations.
- **Broadband– 5 max possible score.** One site metric scored included average download speeds in Mbps for the nearest / intersecting tile as measured by aggregated Ookla broadband speed tests.
- **Water– 6 max possible score.** Individual site metrics scored include water service proximity and coverage to CPU water system infrastructure including water mains and lines. Water district also noted.
- **Sanitary Sewer– 6 max possible score.** Individual site metrics scored include sanitary sewer service proximity and coverage to CRWWD sewer system infrastructure including sewer mains and laterals. Sewer district also noted.

In addition to the above scoring, profile information was gathered and provided for each site on the platform which included a site name and number, a site image, a site description, and general site characteristics including jurisdiction, number of parcels, gross acreage, unconstrained acreage, and zoning. Unlike the 2020 survey, VLBM net acreage could not be provided for all sites due to location of many of them outside the UGA.

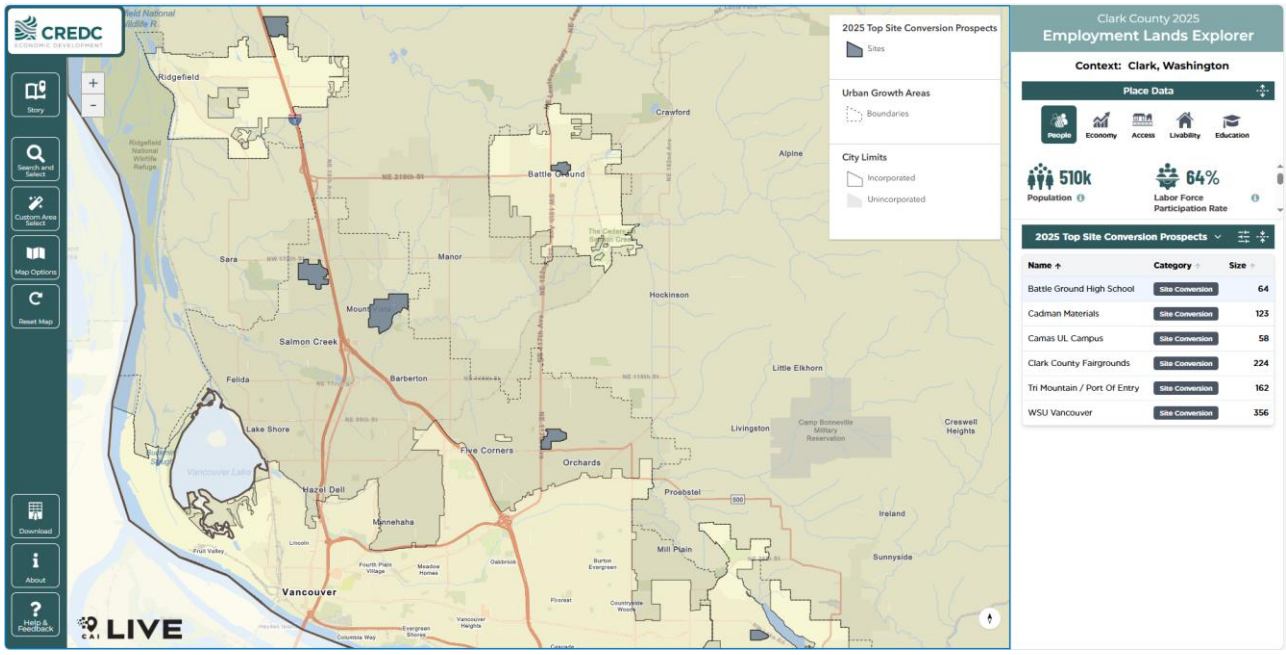
The five highest scored sites included four Near Term sites, and one Mid Term site; two sites were within or adjacent to the V-UGA, one in Ridgefield, and two in Camas:

Terminal 5 Site – 68 out of 100.
Lahti Site – 67 out of 100.
Lagler Site – 65 out of 100.
Camas Georgia Pacific Site - 63 out of 100.
Camas 1 Site, tied with Lutzenberger Site, Wellons Site, FRDU Site 2 - 62 out of 100.

For complete inventory findings and profiles of the 2025 Employment Activity Centers, refer to the Clark County 2025 Employment Lands Explorer and / or the Scoring Matrix.

2025 Top Prospects for Site Conversion

In addition to the prospective Employment Activity Centers described above, CREDC for this study was also interested in evaluating if and which potential sites **within existing UGA boundaries**, could, if re-positioned, convert (via re-zoning / re-designation) to facilitate positive advancement of business and employment activity. This thought exercise looked at which specific large sites in county UGA areas had the strongest fundamentals, as conceived of and evaluated for the other sites described above, to be re-imagined as potential employment activity centers.



Source: Clark County 2025 Employment Lands Explorer, Community Attributes, 2025.

CAI, in collaboration with CREDC and its members and stakeholders, has identified six potential sites that have strong fundamentals and suitability for potential employment use, but that currently host other active land uses – if

potentially underutilized. The sites identified included the following, ordered by scored suitability:

Cadman Materials Site – 62 out of 100. Cadman Materials, also home to Lakeside Materials and Heidleberg Cement, located in the Vancouver UGA, is under active use as a sand and gravel quarry / materials supplier and is characterized by heavy and light industrial zoning. It is potentially redevelopable, though highly constrained by critical areas. This sizable, well-located but underutilized site may be a strong prospect for potential re-positioning as a future employment center.

Clark County Fairgrounds Site – 58 out of 100. The Clark County Fairgrounds and Amphitheater site in the Vancouver UGA is under active use and zoned public facilities. It is moderately constrained and abuts a light industrial zone along I-5 in the Discovery Corridor. The site may be physically underutilized and given its size, location, access, and adjacency, may be a strong prospect for potential re-positioning as a future employment activity center.

Tri Mountain / Ridgefield Port of Entry Site – 57 out of 100. The Clark County-owned Tri-Mountain Golf Course / Ridgefield Port of Entry site is located along I-5 just north of the Ridgefield UGA and city limits. While currently zoned open space / public facilities, the site is large, well configured and located, and mostly unconstrained, making it an attractive site for potential repositioning as a future employment center.

Battle Ground High School Site - 54 out of 100. The Battle Ground High School site is centrally located in the City of Battle Ground and is zoned a mix of regional commercial, highway and limited commercial. While currently in active use, the site maybe be underutilized with low building coverage. It's size, location, access to rail and highway transportation and mostly unconstrained acreage render this site a potentially attractive re-positioning opportunity for future employment center use.

Camas UL Campus Site - 51 out of 100. The Camas UL Campus, purchased by the Camas School District, is a developed but physically underutilized site located within Camas city limits and zoned light industrial. The site is largely constrained but its size, zoning, and location may render it an attractive prospect for re-positioning as a future employment activity center in Camas.

WSU Vancouver Site - 48 out of 100. The WSU Vancouver site is a sprawling, developed university campus located within the Vancouver UGA. The site is mostly unconstrained, very large, well-located, well-served by

utilities, and physically underutilized. The site has strong potential for locating a major future employment activity center.

Comparison with 2019-2020 Inventory

In the years between the 2020 and 2025 inventories, CAI found that 12 out of the original 42 sites had been mostly or completely developed. Another three sites had seen partial development, but significant acreage remained for future development. 11 more sites remained available, though with likely reduced capacity for development due to various challenges. Only 17 (or 40%) of these 2020 sites remained available at full capacity.

The following points of comparison were found between the 2020 CREDC employment lands inventory and the current 2025 study. Note that some differences – especially the number and acreage of sites found – differed due to the differing aim of the two studies, with the former looking solely within UGAs, while the current longer-term study looks well outside these boundaries as well.

- **Tier / Category.** In the 2020 inventory, there were 14 Tier 1 sites, three Tier 2a sites, 23 Tier 2b sites and two Tier 3 sites. In the 2025 inventory, there were six Near Term – Unlikely to convert sites; 26 Near Term sites; 18 Mid Term sites; and five Long Term sites.
- **Number of Sites and Total Acreage.** In the 2020 inventory, 42 sites comprised 3,250 gross acres and around 1,130 unconstrained acres. In the 2025 inventory, 55 sites identified totaled 6,216 gross acres, and 2,400 unconstrained acres. (Note: The difference in magnitude here is partly the result of methodology as the 2020 inventory was confined only to sites within the UGA, while the 2025 study looked further afield.)
- **Single-Owner Sites.** In the 2020 inventory, a total of 24 of 42 sites were single-owner sites, while in 2025 14 of 55 sites are single-owner sites, requiring less site aggregation and typically aggregate fewer tax lots.
- **Large Sites.** In 2020, there were seven sites found greater than 100 acres, while in 2025, 23 of 55 sites (or 50%) are greater than 100 gross acres in size.

Obstacles and Opportunities for Employment Lands

Clark County faces significant obstacles to employment land development including a lack of suitable supply within existing UGAs, competing priorities that favor residential over industrial development, and infrastructure gaps that limit site readiness for new employment centers. However, the county has strong opportunities to leverage its advanced manufacturing clusters, pursue electrification leadership, and benefit from planned transportation network expansions and flexible zoning updates that could enable a broader range of employment uses in certain zones.

This section describes obstacles, opportunities, and issues identified from stakeholder interviews and site analysis that rank high with regards to the preservation, protection, and growth of viable employment lands supply for high quality job and industry growth in Clark County, Washington.

Obstacles

Lack of Suitable Supply of Employment Lands. Currently designated employment land supply within existing UGA boundaries has been subscribed in recent years at a high rate, leaving few remaining suitable large site opportunities for future growth and expansion of key Clark County employment drivers. Converting land outside the UGA – including potentially underutilized agricultural or rural residential land – into suitable employment land sites can require years of planning for re-designation and rezoning, and extensive stakeholder input.

Competing Priorities. To address increasing affordability challenges and resultant changes to state law in the planning for and provision of housing affordable to specific income bands, many areas of the state have begun to prioritize accommodating additional residential housing capacity, often at the expense of land, resources, and planning capacity for vital commercial and industrial land uses that drive significant local tax revenue streams, quality jobs, and economic growth.

State Growth Regulations. The Washington Growth Management Act limits urban expansion, particularly the conversion of undeveloped land through the designation of Urban Growth Areas (UGA). This can reduce or eliminate industrial expansion or new location if sites within the UGA do not meet employer / industry site requirements. Many mid- and long-range industrial

land opportunities in Clark County fall outside of existing Urban Growth Areas, which presents a near term challenge for economic growth.

Current Buildable Lands Paradigm. Clark County utilizes a GIS-based Vacant Buildable Lands Model (VBLM) to assess the growth capacity of both residential and employment lands on vacant and underutilized parcels with the County's current Urban Growth Boundaries. The model relies on several assumptions, some of which may over-estimate the amount of truly viable land available for, especially, employment growth in the county. This can lead to a significant gap in the way the county sees and plans for employment growth, and the way the market, including companies, site selectors, and developers, may see such capacity.

Jurisdictional Growth Restrictions. Local jurisdictions can place limits on certain industrial uses, such as the City of Vancouver's recent moratorium and, later, restrictions on new large distribution center developments over 100,000 square feet in non-heavy industrial zones.

Cross-Jurisdictional Coordination. Concurrent improvements by multiple stakeholders are often required to enable infrastructure and resource development, which are key to industrial site readiness. Similarly, some potential employment sites are served by private roadways which do not currently provide adequate access for industrial purposes.

Infrastructure Gaps. Gaps in infrastructure network coverage and capacity constraints in some rural areas of Clark County, including in the northern reaches of Camas and northern Ridgefield, have been discussed as high priorities for upgrades that could enable significant activation of otherwise limited local opportunities for new employment lands sites.

Community Generation. Local energy generation opportunities have not yet been clearly delimited in Clark County beyond a reliance on partnerships with private entities and external partnerships. Entities do not always present clear timelines for infrastructure upgrades. While this study has identified potential sites for employment activity centers, it has been a greater challenge to identify specific sites with local generation or co-generation potential that might relieve infrastructure systems.

Opportunities

Strong, Dynamic Local Advanced Industrial Clusters. Clark County's established and ongoing strengths in the computers & electronics, software, clean technology, technology enhanced manufacturing, and life sciences clusters are a major lever for knock-on and synergistic growth – and feedback loops from local firms into planning and infrastructure development further strengthen the playing field for economic development in the county.

Electrification and Power Generation. There are future opportunities for Clark County and the Columbia River region to be leaders in electrification and early adopters of advanced energy sources, including, potentially, cogeneration and / or community generation models. With one demonstration project in place with the Port of Camas-Washougal, and interest on the part of the local development community, one possible next step is to begin to identify potential sites for decentralized infrastructure that could ease the burden for local centralized utility networks, increase redundancy, and strengthen provision to commercial and industrial users.

Local Economic Development Capacity. Advanced planning and policy guidance from organizations such as CREDC can support more intentional targeting of potential employment activity centers in the future via articulating objective criteria and assessing suitability with studies such as this one. The county will benefit from strategic location of new developments creating high quality employment activity and from access to expanded key infrastructure. Co-location / agglomeration with other industrial entities enables greater resource capacity and long-range preservation.

Road and Transit Expansions. Planned improvements, such as C-Tran expansions near Camas's north shore Lacamas Lake and planned development along NW 31st that are a major focus of the Cowlitz Indian Tribe are two examples of where local road and transit improvements are being planned that will directly benefit economic development in the county.

Flexible Zoning. The City of Vancouver has proposed updates to its zoning code that will allow for a larger mix of uses in non-Heavy Industrial lands, such as the city's Light Industrial and commercial industrial mixed use / employment zones. If adopted, several sites could additionally allow targeted industrial and business park uses, which presents additional opportunities for employment center location.

Strategies for Preservation, Protection & Redevelopment

CREDC and its partners recommend several coordinated strategies to catalyze employment land development in Clark County, including maintaining focus on employment "centers" rather than scattered sites, establishing rural industrial land banks outside UGAs as allowed by state law, and creating a

shovel-ready site program similar to Detroit's successful model. Additional priorities include pre-permitting sites, strategically planning for sand and gravel pit transitions to industrial use, securing diverse infrastructure funding through TIF districts and federal grants, reducing permitting timelines to meet new state requirements, and incentivizing large parcel assembly through policy tools like density bonuses and streamlined processes.

Strategies to catalyze employment lands investment and growth will be undertaken through several pathways, including CREDC's continued advocacy and partnership with the public and private sector, codification through the ongoing Comprehensive Plan update cycle currently or in the future, and other regulatory and policy efforts at the county and local levels.

The following priority recommendations outline how CREDC and its members and partners, including local jurisdictions and Clark County; the Ports of Vancouver, Ridgefield and Camas-Washougal; The Cowlitz Indian Tribe; local franchise utilities and water and sewer districts; developers; and others can take **specific, actionable, and coordinated near-term steps** to spur the development of new industrial space and infrastructure in Clark County to leverage existing clusters and market forces and create a sustainable near and long term supply of critical employment land supply opportunities.

Employment Center Lands versus Employment Lands

Clark County, in their ongoing update to the Comprehensive Plan to be completed this year (2025) has proposed the removal of the word "center" from economic development element references to "employment center lands." While a seemingly minor change, this shift is an impactful demotion of the very real phenomenon of physical agglomeration of firms that is mutually beneficial to both companies and economic developers recruiting them and supporting business expansion. Employment centers versus scattered employment sites are a much more valuable construct in planning for meaningful growth in key traded sectors to Clark County, and as such, this wording carries weight and should be reconsidered.

Study & Designate Major Industrial Developments Outside UGAs

In 1996, the Growth Management Act (GMA), RCW 36.70A, was amended with provisions to allow major industrial developments to be sited outside of urban growth areas (UGAs). RCW 36.70A.367 allows counties to establish up to two rural industrial land banks (RILBs) with the intent that they develop as industrial properties. In 2014, Clark County received a docket application to establish an RILB on properties that straddle SR 503 north of the Vancouver

UGA. While this effort did not succeed, Clark County and its local economic development partners should continue to try to utilize this tool enshrined in state law in a way that is rigorously defensible to protect key locations for potential employment activity centers identified as Mid Term and Long Term opportunities in this study.

Consider Feasibility of a Shovel Ready Site Program

CREDC, in collaboration with Clark County, local jurisdictions, and the Washington State Department of Commerce, should consider the design and implementation of a site readiness initiative to **accelerate the development of industrial sites** in Clark County potentially modeled on other such successful programs such as the Detroit region's Verified Industrial Properties (VIP) Program. The program provides a searchable database highlighting vacant properties in the region – but with **verified data** on utilities, site conditions, and other factors that simplifies due diligence. The program also engages and **supports property owners, brokers, and local governments to assess and prepare sites for future development**. Sites may be eligible for up to $200,000 in support to assist with planning and development, plus confidential technical assistance. A Clark County program could connect existing resources like the CBA Choose Washington listing tool and the new Department of Commerce industrial site readiness grants. The program could conduct a region-wide search to identify properties not currently zoned for industrial use but with the potential to attract jobs and investment to the community – and work with jurisdictions interested in re-zoning them.

Consider an Industrial Site Pre-Permitting Program

Industrial site development pre-permitting is being successfully implemented across the U.S. through comprehensive state-funded programs that streamline regulatory processes and prepare sites before companies arrive. Washington State operates an Industrial Site Readiness Grant Program that includes engineering studies, permitting assistance for zoning and regulatory review, and pre-permitting activities including SEPA-related due diligence, while Kentucky's Product Development Initiative (KPDI) represents the gold standard with $100 million in state funding that has generated over $500 million in total investments across two rounds, supporting 90 projects statewide. Virginia's Business Ready Sites Program focuses on sites of at least 50 acres with competitive grants for site characterization and development, and Massachusetts offers comprehensive pre-permitting assistance with a unique repayment structure where grants are only repaid if the site generates revenue. These programs have emerged in response to nearly a billion dollars in national investment driven by hyperactivity in domestic manufacturing that has depleted the inventory of ready-to-go heavy industrial sites, with successful programs combining significant **state funding, comprehensive technical**

assistance, and streamlined regulatory processes to reduce the lengthy pre-development timeline that can take months or years.

Undertake Sand and Gravel Pit Sunsetting & Planning

Clark County has several large-footprint gravel and sand mining sites that could represent great potential for future industrial redevelopment (due, in part, to their sheer size) if their **transition from mining is strategically** managed over their useful mining lifespan. Policies that should be considered by local jurisdictions include **site aggregation, exit planning, and strategic phasing and reuse**. Through site aggregation, more viable redevelopment opportunities can be created and costs associated with reclamation are much lower on a per acre basis. With proactive exit planning, portions of mining operations can be independently zoned and entitled in anticipation of future uses after conditional use permits expire. Collaboration on a phased exit strategy can allow for continuing mine operations while phased redevelopment occurs.

Assess Infrastructure Funding Streams

In addition to funding vehicles uniquely available to the Ports of Vancouver, Ridgefield, and Camas-Washougal, CREDC and its partners in county and local governments should seek to strategically evaluate, apply for, and secure other available funding streams available for economic development projects in employment activity centers and county industrial parks in need of upgrades. Well-known public finance vehicles available to jurisdictions and coalitions of landowners in Washington State include **Tax Increment Financing (TIF)** districts, the **Local Infrastructure Financing Tool (LIFT)** (not yet utilized in Clark County), **Transportation Benefit Districts**, **Local Improvement Districts (LIDs)**, and **Business Improvement Districts (BIDs).** Other funding streams available for economic development that have been utilized in the region recently include:

- CERB Funds and the Committed Parter Program
- EPA Clean Ports, WA Climate Commitment Act (CCA), and WSDOT Port Electrification Grants
- Port Infrastructure Development Program– US Department of Transportation- Maritime Administration
- Community Aviation Revitalization Board (CARB) -WSDOT
- Integrated Planning Grants & Independent Remedial Action Grants - WA Dept. of Ecology
- US EDA Planning and Implementation Grants (described above, in *Leverage Existing Plans…* recommendation)

Reduce Permitting Timelines & Increase Predictability

One ever-present area of development uncertainty that Clark County can control is entitlement risk – the **perceived and real time toward securing necessary permit**s and land use / zoning **assurance from early stage planning that approval is likely** to certain if clear procedures are followed. Senate bill SB 5290 will provide governments with a new permit processing timeframe. The default timelines for permitting include 65 days for permits that do not require notice, 100 days if public notice is required and 170 days if public notice and hearing is required. **Meeting or exceeding these new guidelines** would go a long way toward inducing new development activity across the market. In addition, the County should consider updates to existing zoning restrictions limiting certain industrial uses to heavy industrial zones and recent changes allowing certain multifamily housing in **commercial** or **mixed-use zones** within unincorporated parts of Vancouver previously focused on employment uses or mixes of uses.

Incentivize Site Assembly of Large Industrial Parcels

Large sites are uniquely powerful assets for new industrial development interest. Clark County and local jurisdictions should consider new policy and / or regulatory approaches to enable and incentivize land assembly in competitive zones where ownership is fragmented. Tools to encourage private sector land assembly include **graduated density bonuses** and **graduated density zoning.** These allows additional development intensity – often in the form of increased FAR or building height allowances – for larger sites, increasing landowner cooperation in assembly and reducing holdouts – and can incentivize developers to pay higher premiums for adjacent land. Another way to incentivize voluntary assembly could involve **simplifying the permitting process** for larger developments to reduce administrative hurdles and encourage landowners to participate in land assembly.