



Established Eighteen Forty-Eight

AMITY ECONOMIC OPPORTUNITIES ANALYSIS

Prepared for
City of Amity
109 Maddox Avenue
Amity, OR 97101

ACKNOWLEDGEMENTS

City Council

Michael Cape, Mayor
Caralyn Miller

Russell Blunt
Rudy Van Soolen

Dawn King
Brandon Zipser

Planning Commission

Karin Johnson, Chair
Steve Ruyle, Co-Chair

Ryan Jones
Eli Friesen

Eve Silverman

Technical Advisory Committee

Karin Johnson
Steve Ruyle
Ryan Jones
Eli Friesen
Eve Silverman
Dave Coelho
Deolinda Coelho
AJ Foscoli, SEDCOR
Angela Lazarean, DLCDC
Tom Hogue, DLCDC
Patrick O'Connor, OED

Amity City Staff

Larry Layton, City Administrator
Jennifer Elkins, City Recorder/Treasurer
Jackie Loos, City Clerk/Court Clerk
Jim Minard, City Planner

Mid-Willamette Valley Council of Governments

Joseph Shearer, Associate Planner
Lesley Hegewald, Associate GIS Analyst

This project is funded by Oregon general fund dollars through the Department of Land Conservation and Development. The contents of this document do not necessarily reflect the views or policies of the State of Oregon.

Mid-Willamette Valley Council of Governments (MWVCOG). 2015. Amity Economic Opportunities Analysis. Prepared by MWVCOG, Salem, OR. May 2015.

AMITY ECONOMIC OPPORTUNITIES ANALYSIS

ECONOMY OF THE CITY

The City of Amity engaged the Mid-Willamette Council of Governments (MWVCOG) to develop an Economic Opportunities Analysis (EOA) in accordance with Statewide Planning Goal 9 Economic Development and Oregon Administrative Rule (OAR) 660-009-0015. These rules ensure that an adequate supply of employment lands is provided for both existing and new commercial and industrial uses in Amity over a 20 year planning horizon.

Additionally, an EOA helps a community better understand its economy and plan for economic development initiatives. This report begins with an analysis of Amity's economic environment in the context of local, regional, and national trends, and includes an assessment of the City's economic strengths and weaknesses in order to determine how to maximize its economic development potential.

This chapter also includes a description of the amount of land and types of sites needed to fulfill Amity's economic and employment needs over the next 20 years. This analysis compares forecasted demand for employment lands to the supply of vacant and underutilized commercial and industrial lands available in order to determine whether or not deficiencies exist in the land supply. The analysis concludes with a discussion of implementation recommendations and proposed amendments to the Amity Comprehensive Plan.

Population

Economic conditions in the region are strongly correlated to population growth. **Table 1** shows slow growth across the state, including Amity, during the recession in the early 1980s. Growth rates for Amity and Yamhill County exceeded the growth rate for Oregon during the economic expansion of the 1990s. Since 2000, Amity's population growth has lagged behind the State and County, which suggests Amity was hit harder during the most recent economic downturn.

Table 1: Population - Oregon, Yamhill County, and Amity 1980-2010

Location	1980	1990	2000	2010	Average Annual Growth Rate		
					1980-90	1990-00	2000-10
Oregon	2,633,156	2,842,321	3,421,399	3,582,600	0.8%	1.9%	1.2%
Yamhill County	55,332	65,551	84,992	99,193	1.7%	2.6%	1.5%
Amity	1,092	1,175	1,478	1,614	0.7%	2.3%	0.9%

Source: U.S. Census and the Population Research Center, Portland State University.

On November 8, 2012, the Yamhill County Board of Commissioners adopted a 2011-2035 coordinated population projection for Yamhill County and the ten municipalities within Yamhill County.¹ The population projection was prepared by the Population Research Center at Portland State University. Table 2 shows the coordinated population projections adopted by

¹ Yamhill County, Oregon, Ordinance 878, Nov. 8, 2012.

<http://www.co.yamhill.or.us/commissioners/ordinances/ORD878.PDF> (accessed 12/16/2014).

Yamhill County. The growth rate for Amity is projected to lag somewhat behind Yamhill County’s growth rate, consistent with historical trends going back to 1980.

Table 2: Coordinated Population Projection - Yamhill County and Amity 2011-2035

Population Forecast	2011	2020	2030	2035	2011-2035		Avg. Annual Change
					Number	Percent	Percent
Yamhill County	99,851	115,220	134,204	142,830	42,980	43.0%	1.5%
Amity	1,635	1,779	1,984	2,097	462	28.3%	1.0%

Source: Portland State University, Population Research Center. Population Forecasts for Yamhill County, its Cities and Unincorporated Area 2011-2035, October 2012

OVERVIEW OF EMPLOYMENT IN AMITY

Historically, Amity’s economy has been closely tied to agriculture. Today, agriculture is still Yamhill County’s primary industry. Nursery and greenhouse crops; fruits, nuts, berries; and hay, silage, field and grass seeds are major agricultural products. Approximately one-third of the county is covered with commercial timber. Yamhill County is also the heart of Oregon’s thriving wine industry. Amity Vineyards, planted in 1971, was one of the industry’s early pioneers. In recent years, tasting rooms, restaurants, and shops continue to develop in downtown Amity along the Hwy 99W corridor.

Personal Income

Table 3 shows the most recent median household income and the percentage of households below the poverty level in Oregon, Yamhill County, and Amity. As a whole, median household income in Amity was 1.1% higher than Oregon and 6.9% lower than Yamhill County. Of the three, Amity faces the highest percentage of families living below the poverty line.

Table 3: Median Household Income and Percent of Households Living Below Poverty Level Oregon, Yamhill County, and Amity 2009-2013

Location	Median Household Income	Families Below Poverty Level
Oregon	\$50,229	14.8%
Yamhill County	\$54,535	12.5%
Amity	\$50,769	15.9%

Source: US Census Data and 2009-2013 American Community Survey – 5 year estimates.

While the City has a grocery store and market, residents continue to rely heavily upon McMinnville and other larger cities for the majority of its commercial and other service needs.

Table 4 shows QCEW employment data for Amity. QCEW data, or “covered employment” accounts for workers covered under unemployment insurance, estimated at about 80-85% of

the total workforce. Workers not captured in QCEW data include the self-employed and some agricultural workers.

Table 4: 2013 Industry Employment for Amity

Industry	Employment	Percent
Public Sector (Local, State and Federal Employment)	127	54.0%
Accommodation & Food Service (72)	26	11.1%
Construction (23) & Manufacturing (31)	23	9.8%
Confidential Industries Combined (11, 52, 56, 62)	22	9.4%
Retail Trade (44)	20	8.5%
Other Services (Except Public Administration) (81)	17	7.2%
TOTAL	235	100.0%

Source: Employment and Wages by Industry (QCEW), Oregon Employment Department. Data sorted and summarized by MWVCOG. 2013 covered employment data

Public sector employment accounts for more than half the jobs in Amity. Accommodation and food service represents the largest private sector employment, followed closely by construction and manufacturing. Construction and manufacturing jobs are the only industrial sector jobs accounted for in Amity.

Commuting Patterns

Local commuting patterns provide context for this analysis, given the relative homogeneity of local housing options and the size of the local economy compared to surrounding cities. US Census Bureau data from 2011 shows that 304 people were employed in Amity, but only 25 of those jobs (8.2%) were filled by Amity residents. Consequently 279 jobs (91.8%) were filled by people living outside of Amity, and 566 Amity residents were employed outside the city.

Employment figures from the US Census Bureau are higher than Oregon Employment Department figures due to the known undercount inherent in QCEW data. Per OED, 2011 covered employment in Amity was 229.

Figure 1: 2011 Inflow/Outflow Job Counts



ECONOMIC OPPORTUNITIES AND CONSTRAINTS IN AMITY

This section examines factors that influence economic growth opportunities in Amity, and includes a discussion of the City's economic strengths and weaknesses. Clearly identifying both strengths and weaknesses will allow the City to better understand the industries and sectors which have the greatest potential for growth, and areas which require work in order to maximize economic opportunities.

The existing pattern of development in Yamhill County reflects the influence of locational factors and comparative advantages in the region, and this pattern is unlikely to change substantially in the future. Amity developed, in part, based on its proximity to agricultural land within the Willamette Valley. Over time, the community has developed as a bedroom community to larger communities such as McMinnville and Salem.

Location

Centrally located in the heart of Yamhill County, Amity feels like a rural, small-town, but is just seven miles south of McMinnville (pop. 33,100+), less than 20 miles northwest of Salem (pop. 160,000+), and 40 miles southwest of Portland (pop. 610,000+). The Oregon coast is 40 miles west.

Amity is surrounded by agricultural land, including grass/turf farms, berry farms, hazelnut orchards, and some of the region's oldest vineyards. Physical proximity to wineries and vineyards presents an economic advantage for Amity within the context of Oregon's rapidly growing wine industry. The City's geographical context presents an opportunity to develop a cluster of businesses that would generate a strong economic spillover effect in related sectors such as tourism, restaurants, retail, and overnight accommodations.

Transportation

Amity is bisected by Highway 99W (Trade Street) running north and south, and Highway 153 (Nursery Avenue) running east and west. Hwy 99W serves as Amity's "main street" and connects the City to McMinnville, Newberg, and the Portland Metro area to the north. To the south, Hwy 99W provides connection with Salem (via Hwy 22) and Corvallis. Six miles west, Hwy 153 intersects with Hwy 18 and provides a direct route to the Oregon coast. While state highways running through town may enhance vehicular connectivity to and through Amity, they can present impediments to pedestrian and bicycle access. Recent infrastructure improvements have enhanced pedestrian crossings across Hwy 99W.

The nearest airports to Amity are McMinnville Municipal Airport to the north and Salem Municipal Airport to the southeast. The closest passenger air service is Portland International Airport (approximately 1.5 hours from Amity). A Union Pacific-owned railroad runs north-south through the west side of Amity. Only freight service is provided, with no stops in Amity.

Yamhill County Transit Area (YCTA) provides routed and dial-a-ride bus service to urban and rural areas of Yamhill County. Amity is served by the McMinnville-West Salem route, with 5 roundtrips weekdays. There is no weekend routed transit service in Amity. There are two bus stops in Amity. According to 2010 census information, no workers used transit to commute to work in Amity. Approximately 5% of workers carpooled to work.

Quality of Life

Quality of life is a subjective standard that is hard to quantify. It includes economic factors, such as income, employment, and housing costs, as well as non-economic factors, such as natural and physical amenities, quality of local education, and cultural and recreational opportunities. Quality of life plays a role in economic development because it affects the relative appeal of the city to businesses and potential residents.

Migration is expected to contribute over two-thirds of the population growth of Oregon in the next decade.² A more attractive quality of life may help Amity attract a greater share of these new residents. In-migration can bring job skills to various employment sectors, such as construction, services, and retail trade, but some may also start new businesses in the community.

A potential opportunity for Amity is the development and redevelopment potential of its commercial core along Hwy 99. Recent development is helping Amity to achieve a stronger sense of place. For example, the co-op grain elevator is an iconic City landmark located within the commercial core. Redevelopment involving or surrounding this landmark, could bring economic development to the City, as well as strengthen the characteristics which make Amity special and unique.

City Policies Affecting Economic Development

The Amity Comprehensive Plan includes a number of economic development related policies, which include:

- Ensuring adequate maintenance of public services.
- Promote the Central Business District (CBD) as the primary retail center of the community.
- Promote diversification of the City economy
- Encourage establishment of a local business association and cooperate to develop a downtown redevelopment plan.

The Amity Development Code includes a number of economic development related policies,

² Oregon Office of Economic Analysis, *Oregon's Demographic Trends*, 2012.

which include:

- Establishment of a Central Business District (CBD) which permits outright residential uses above ground floor commercial.
- Prohibits drive-thru service in the Central Business District.
- No minimum front yard setback in the Central Business District, and no minimum side and rear yard setbacks in the CBD when abutting other GC/LI zoned properties.
- Locating off-street parking behind buildings in the CBD.
- Design standards which seek to create a cohesive and agreeable aesthetic in the CBD.

LONG-TERM NATIONAL ECONOMIC TRENDS

National economic trends provide insight into the overarching patterns of economic development that may have an effect on employment in Amity. The US economy continues its recovery from the Great Recession. In 2014, the unemployment rate across the US dropped below 6%, and the average annual unemployment rate dropped in all 50 states for the first time since 1984. US employers have added jobs at an average rate of 275,000 per month for an entire year, leading to the creation of millions of new jobs. Unfortunately, wages have lagged behind, with the average pay for US workers barely keeping up with inflation. Pay for high-wage and low-wage jobs saw modest gains, while jobs in the middle have stagnated or declined.

- After hitting bottom in 2011-2012, the housing market continues its variable recovery. Despite interest rates near historic lows, home starts and existing sales vary by region across the country, inventories remain relatively tight, and prices continue their moderate upward trend.
- Oil prices dropped nearly 50% in 2014. Lower energy prices are likely to spur growth and improve real purchasing power. The American dollar is strong relative to most major currencies, especially the Euro, and the US stock market is near historic highs.

REGIONAL EMPLOYMENT

Marion, Polk, and Yamhill Counties have traditionally been dependent upon state government, agricultural, and wood products as the predominant sources of local employment. However, in the region and across the state, economies are shifting from a reliance on resource extractive industries and traditional manufacturing towards information, services, and high-tech manufacturing.

Table 5 shows employment data for Marion, Polk, and Yamhill Counties. Combined employment in the counties reached 184,309 in 2013. Comparing **Table 4** and **Table 5**, Amity

outperforms the region in terms of the leisure and hospitality industry. While industry sectors are spread relatively evenly across Amity, the City’s geographical and economic position in the growing Oregon wine industry may present a competitive advantage towards related industries, including leisure and hospitality employment.

Table 5: 2013 Industry Employment for Marion, Polk, Yamhill Counties

Industry	Employment	Percent
Government	42,770	23.2%
Trade/Transportation/Utilities	28,423	15.4%
Education/Health Services	27,495	14.9%
Manufacturing	18,155	9.9%
Leisure/Hospitality	16,080	8.7%
Natural Resources/Mining	14,748	8.0%
Professional/Business Services	13,551	7.4%
Construction	7,886	4.3%
Financial Activities	7,032	3.8%
Other Services	6,976	3.8%
Information	1,193	6.5%
TOTAL	184,309	100.0%

Source: Oregon Employment Department, Employment Snapshot of Marion, Polk, and Yamhill Counties, 2014.

A recent study commissioned by the Oregon Wine Board shows the growth and overall size of the \$3.35 billion Oregon wine industry. The region, and specifically Yamhill County, captures a significant portion of the economic benefit.

Table 6: Wine Industry Economic Impact by County 2013

Counties	Wine-Related Revenue*	Wages	Jobs	Indirect & Induced Revenues	Property Taxes
Marion	\$139,670,351	\$39,879,284	1,184	\$70,791,495	\$4,702,739
Polk	\$100,612,849	\$25,217,467	982	\$41,347,642	\$3,524,268
Yamhill	\$327,480,199	\$107,897,916	3,578	\$158,158,313	\$11,433,500
TOTAL	\$567,763,399	\$172,994,667	5,744	\$270,297,450	\$19,660,507

* Includes wholesale and retail revenues from all wine of all types/sources.

Source: Full Glass Research, The Economic Impact of the Wine and Wine Grape Industries on the Oregon Economy, January 2015

While wine-related growth is occurring in the Columbia River Gorge and Southern Oregon, the three-county region is the historic and economic center of the Oregon wine industry, capturing approximately 34% of the 17,099 wine-related jobs in Oregon. In fact, several of the largest wine-making companies from California and France have bought up hundreds of acres of vineyards in the surrounding area over the past three years.

Table 7 shows the most recent Oregon Employment Department job projections for the Mid-Willamette Valley, which consists of Marion, Polk, and Yamhill Counties, for the period 2012 through 2022. Total non-farm payroll employment in the region is expected to grow 14%, from 183,200 in 2012 to 208,700 in 2022. The total growth represents a 1.4% annual growth rate. In comparison, Oregon’s statewide industry employment is projected to increase by 15 percent over the same period.³

Table 7: Employment Projections for Mid-Willamette Valley Region (Marion, Polk, Yamhill)

Industry	2012	2022	Percent Change
Government	43,800	47,300	8%
Education/Health Services	28,400	34,200	20%
Trade/Transportation/Utilities	27,800	30,700	10%
Manufacturing	17,500	19,800	13%
Leisure/Hospitality	15,300	17,400	14%
Natural Resources/Mining	14,700	16,800	14%
Professional/Business Services	13,000	15,900	22%
Construction	7,300	9,500	30%
Financial Activities	8,100	9,200	14%
Other Services	6,100	6,700	10%
Total Non-Farm Payroll Employment	183,200	208,700	14%

Source: Oregon Employment Department. *Employment Projections by Industry and Occupation 2012-2022, March 2014.*

Regional job growth projections show the private sector driving gains that exceed the 3% growth during the past decade. A growing health care sector, continued recovery from the Great Recession, and the need to replace retiring workers will drive the estimated 25,500 increase in jobs. Government employment is forecast to grow more slowly than the average of all industries over the period through 2022.⁴

LOCAL EMPLOYMENT GROWTH FORECAST

Given the national, state and regional economic forecasts, and opportunities for development in Amity, it is reasonable to expect the City will grow in proportion to the Mid-Willamette Valley region. This analysis uses the "Safe Harbor" methodology identified in Oregon Administrative Rules (OAR) 660-024-0040(8) to determine to forecast employment growth. The Safe Harbor methodology assumes Amity employment will grow at a rate equal to the region, as provided in the most recent forecast published by the Oregon Employment Department (OED). The most recent OED forecast for the Mid-Willamette Valley Region (see Table 7) predicts 14% regional employment growth across all sectors from 2012 to 2022. This analysis extrapolates the 1.4%

³ Oregon Employment Department, *Employment Projections by Industry and Occupation 2012-2022 Mid-Willamette Valley (Marion, Polk, Yamhill)*, March 2014.

⁴ Oregon Employment Department, *Employment Projections by Industry and Occupation 2012-2022 Mid-Willamette Valley (Marion, Polk, Yamhill)*, March 2014.

annual growth rate for the region out to the 20 year planning horizon for this project to predict Amity employment in 2034. Table 9 shows the projected employment for Amity in 2034, based on the 1.4% annual growth rate for employment in the region.

Table 8: Total Employment Projection Amity 2013-2034

Sector	2013		2034	
	Percent	Total	Percent	Total
Accommodation & Food Service	11.1%	26	11.1%	35
Construction & Manufacturing	9.8%	23	9.8%	31
Confidential Industries Combined (11, 52, 56, 62)	9.4%	22	9.4%	29
Retail Trade	8.5%	20	8.5%	27
Other Services (Except Public Administration)	7.2%	17	7.2%	23
Public Sector (Local, State and Federal Employment)	54.0%	127	54.0%	170
TOTAL	100.0%	235	100.0%	315

Source: 2013 employment data provided by the State of Oregon Employment Department. 2013 data sorted and summarized by MWVCOG, 2014. Projection calculated by MWVCOG based on forecasted 1.4% annual employment growth for the region.

Land Demand Analysis

A primary function of the Economic Opportunities Analysis is to determine if sufficient land is available to accommodate projected employment over the planning horizon. In order to accomplish this, the employment growth forecasted above must be aggregated into general land use categories. Next, the number of new jobs created for commercial and industrial use must be converted into the number of acres needed for commercial and industrial uses over the 20 year planning horizon.

Table 9 shows projected employment in Amity by land use type. Different sectors of the economy have different land needs. Employment growth is allocated to three land use types as follows:

- Commercial: Accommodation & Food Service, Retail Trade, Other Services, Confidential Industries
- Industrial: Construction & Manufacturing
- Public: Government

This analysis assumes growth in public sector employment will occur on lands not currently zoned commercial or industrial. Therefore public sector employment is removed from future analysis.

Table 9: Projected Employment Growth by Land Use Type

Land Use Type	Current Employment	Projected Employment (2034)	Projected Employment Growth (2013-2034)
Commercial	85	114	29
Industrial	23	31	8
Public	127	170	43
TOTAL	235	315	80

Several assumptions are required to take the employment growth shown in **Table 9** and make meaningful forecasts about future land needs. Selection and supposition about the categorization of land, how employment will grow in relation to developed acreage, and the distinction between vacant and redevelopable land inform the employment lands inventory (**Table 10**) and projections about needed employment lands (**Table 11**). Assumptions made in assumptions were made:

- **Split zoned properties:** In Amity, there are ten properties, comprising approximately 6.86 acres, which are split zoned in some combination of residential, commercial and industrial. Three of these split zoned properties are located on Stanley Court. These three properties are developed as residential, contain a large proportion of residential (R1) zoning, and are unlikely to be developed as commercial or industrial. A fourth property at 207 5th Street has similar characteristics. In 2011, the Amity Fire District moved into their new station on the 2.22 acre property at the southern city limits, which is primarily zoned Light Industrial. Consequently, these five, non-employment properties have been removed from the study area entirely. The resulting 1.66 acres are split zoned GC and LI. Four of these properties are zoned primarily GC, so have been included in the calculation of commercial properties. The Amity Co-Op grain elevator is located on a property zoned primarily LI, and thus has been included in the industrial calculations.
- **Employment density.** In order to determine future commercial and industrial land needs, employment must be quantitatively compared to area in order to create the ratio, jobs per acre. It is assumed that employment growth in Amity will occur at current ratios of jobs per acre: 28.1 jobs per acre for commercial uses and 4.0 jobs per acre for industrial uses. For context, employment density ratios used recently in a similar study in Salem were 22 jobs/acre for commercial and office development and 11 jobs/acre for industrial development. A study in Albany used 25 jobs/acre for commercial development, 35 jobs/acre for offices, and 12 jobs/acre for industrial development.
- **Employment on vacant or redevelopable land.** The employment lands inventory identified both vacant and redevelopable commercial and industrial land. Land is categorized as “redevelopable” if it is developed or otherwise utilized for non-employment purposes. The most prevalent pattern of redevelopable land within the study area is property developed with single-family dwellings and currently occupied with residential uses. This analysis does

not distinguish between vacant or redevelopable land in determining where new employment will most likely occur.

The employment land inventory was conducted using Yamhill County Assessor data, aerial photography, and an on the ground survey of each taxlot. More than 120 properties were inventoried before finalizing the 25.83 acre study area comprising 115 properties. The findings of the employment land inventory are summarized in **Table 10**. The inventory shows a supply of 17.07 acres of vacant and redevelopable employment land, 12.7 acres of which is commercially zoned (CG), and 4.37 acres of industrially zoned (LI) land.

Table 10: Commercial and Industrial Employment Lands Inventory Summary 2014

Land Use Designation	Current Level of Development							
	Employment Developed		Vacant		Redevelopable		TOTAL	
	Acres	Number	Acres	Number	Acres	Number	Acres	Number
Commercial	3.02	22	1.94	11	10.76	58	15.72	91
Industrial	5.74	15	2.60	2	1.77	7	10.11	24
SUBTOTAL	8.76	37	4.54	13	12.53	65	25.83	115

Table 11 reconciles the land needed to accommodate projected employment growth (demand), based on current employment density and the employment projections summarized in **Table 9**, with the existing supply of vacant and redevelopable land within the study area. Projected growth in commercial industries will require 1.03 acres of development; 12.70 acres are available. Projected growth in the industrial sector will require 2.00 acres of development; 4.37 acres are available. Based on raw acreage, Amity possesses more than enough land to accommodate projected growth over the next 20 years.

Table 11: 20 Year Employment Land Supply and Demand Reconciliation

Land Use Designation	SUPPLY			DEMAND			RECONCILIATION
	Vacant (Acres)	Redevelopable (Acres)	Total (Acres)	Employment Growth (Jobs)	Employment Density (Jobs/Acre)	Acres Needed	Surplus or (Deficit) in Acres
Commercial	1.94	10.76	12.70	29	28.1	1.03	11.67
Industrial	2.60	1.77	4.37	8	4.0	2.00	2.37
Total	4.54	12.53	17.07	37	12.3	3.03	14.04

Holding a sufficient supply of acreage to meet projected demand over the 20 year planning horizon is critical, but the characteristics of individual sites may be equally as important. While there is enough vacant commercial and industrial land to meet projected demand, more than 60% of the employment land supply – categorized as redevelopable in this inventory – is commercially zoned land currently developed with nonconforming single-family dwellings. These nonconforming residential uses are unlikely to redevelop as commercial uses until the Amity economy and real estate market improves. An improving economic environment in Amity

will boost demand for commercial land, and initiate the gradual conversion of these lands from residential uses to commercial uses.

A land supply providing a range of property sizes and configurations will maximize the potential for future development and economic growth. **Table 12** shows the size characteristics of inventoried employment land. The majority of Amity’s current supply of commercial taxlots measure less than 0.20 acres, and the City contains no commercial sites larger than 0.50 acres. There is only one vacant or redevelopable industrial site larger than 0.40 acres in Amity, a 2.24 acre property, controlled by Union Pacific, in the northwest corner of downtown. This single site constitutes more than 94% of the industrial land surplus. While this vacant site abuts a rail spur, it also abuts residential properties, has constrained access, and likely faces additional development constraints. Furthermore, since it is owned by a railroad, the likelihood of near-term development is reduced.

Should a large commercial or industrial employer be interested in locating in Amity, it would not currently be possible to do so without displacing existing employment. The City may consider expanding its Urban Growth Boundary, rezoning existing land, limiting further division of employment lands, or implementing policies to encourage consolidation of smaller properties in order to have a supply of employment lands ready to accommodate a range of employment uses.

Table 11 shows a comparison of land needed to accommodate new employment growth (demand) through 2034 and the available supply of vacant and redevelopable land. The comparison shows that sufficient commercial and industrial land is available within the Amity urban area to meet the forecast demand.

Table 12 shows the size characteristics of developed, vacant, and redevelopable commercial and industrial properties in Amity.

Table 12: Size Characteristics of Developed, Vacant, and Redevelopable Properties by Zone (in Acres), 2014

Zone/Plan Designation	Developed			Vacant			Redevelopable		
	Largest	Mean	Median	Largest	Mean	Median	Largest	Mean	Median
Commercial (GC)	0.31	0.14	0.14	0.40	0.18	0.17	0.44	0.19	0.18
Light Industrial (LI)	0.87	0.38	0.42	2.24	1.30	1.30	0.37	0.25	0.23

Source: Yamhill County Assessor Data, MWVCOG Land Use Inventory, 2014.

Employment uses in Amity have developed on properties that are between 0.12 and 0.87 acres in size. In the Commercial (CG) Zone, the average size of vacant and redevelopable properties trends slightly larger than the average size of developed properties. A map in the Land Use section of the Comprehensive Plan shows all vacant and redevelopable properties, by zone within the Amity urban area. In the Light Industrial (LI) Zone, there are only two vacant

properties of 2.24 and 0.35 acres. The redevelopable properties trend smaller compared to developed properties.

Based on this information, vacant and redevelopable properties in the study area generally align in size with those properties developed in employment uses. However, there is a shortage of larger (0.5 acres and above) vacant or redevelopable properties which would accommodate larger employment uses and facilitate critical diversification within the Amity economy.

CONCLUSION

Overall, private sector employment in Amity is relatively balanced, with accommodation and food service as the largest industry category, followed by construction and manufacturing. Based upon the employment lands inventory and projected growth, Amity retains an adequate raw acreage of vacant or redevelopable commercial and industrial land within the current urban growth boundary to meet forecasted need through the year 2034. The type and size of vacant and redevelopable commercial properties are typical of sites that are currently developed. However, there is a clear shortage of commercial and industrial properties 0.5 acres and larger, which significantly constrains the Amity's ability to attract larger employers.

- State economists predicts modest economic and employment growth over the coming decades. Amity has the opportunity to capitalize on regional economic growth. By leveraging its comparative advantages, Amity is positioned to capture or even expand its share of economic benefit linked to the booming wine industry, while maintaining its unique identity and sense of place.
- Recent investments in transportation infrastructure have improved the flow of vehicles and pedestrians on and across Hwy 99W through the commercial core.
- Based on available land and the existing economic base, industrial land is most likely to be developed and utilized by small artisan manufacturers and processors, including: wineries, craft industry, a small food manufacturing business, and value-added agriculture.
- People are increasingly searching for authentic experiences in unique places. Amity could establish development policies to maximize capture of wine-related tourism in the local economy through restaurants, shops, and overnight accommodations.
- Existing Comprehensive Plan policies are generally supportive of economic development but should be updated to reflect shifting economics and community objectives.

Implementation Recommendations

To encourage future economic growth and development within the city, Amity should pursue the following implementation actions to support economic development, subject to the availability of resources:

Economic Development Strategy: Create a specific and cohesive economic development strategy to strengthen, preserve, and revitalize the Central Business District. The strategy should tie together efforts related to zoning, targeted industry clusters, marketing, existing efforts (i.e. the Main Street Program), and new opportunities. The strategy should identify and prioritize specific tasks and link them to completion timelines, available funding resources, and parties responsible for completing each task.

Coordinated Marketing: Define, develop, and promote Amity through a coordinated marketing strategy designed to attract visitors and businesses. Amity has a unique story to tell, complete with history, authenticity, community, and economic opportunities.

Encourage Larger Employment Zoned Lots: Encourage the retention (and consolidation) of Amity's larger commercial and industrial sites, which are needed to both attract new employers and allow existing small businesses to expand in the future. Consider zoning restrictions to limit further division of existing employment land.

Improve the Development Code: Amend the Amity Development Code to more efficiently guide development that is both supported by the community and most likely to drive economic growth in the City. Consider expanding permitted uses in the General Commercial (G-C) Zone to include wineries, breweries, and smaller-scale craft/artisan processing or manufacturing that include a retail component. Allow for "sharing economy" activities. Reduce barriers to private investment in the development code by creating clear and objective standards, and strategically reducing development costs (i.e. minimum parking requirements) where warranted.

Fully Implement Existing Zoning: Fully implement the Central Business District (CBD) Zone which supports efficient growth and provides an aesthetic design theme for the commercial center.