

Attachment 1. Executive Summary of Land Needs Analyses

The following is a summary of the Newberg Public and Semi-Public Land Need 2021-2041, Newberg Housing Needs Analysis, and Newberg Employment Opportunities Analysis including language, exhibits, and data from the reports.

A) Newberg Housing Needs Analysis

- 1) Residential Buildable Lands Inventory
- 2) Historic and Recent Development Trends
- 3) Demographic and Other Factors Affecting Residential Development in Newberg
- 4) Housing Need in Newberg
- 5) Residential Land Sufficiency within Newberg

B) Newberg Economic Opportunities Analysis

- 1) Factors Affecting Future Economic Growth
- 2) Employment Growth and Site Needs
- 3) Buildable Lands Inventory
- 4) Land Sufficiency

C) Newberg Public and Semi-Public Land Need 2021-2041

- 1) Public Land Need
- 2) Semi-Public Land Need

A. Housing Needs Analysis

The Housing Needs Analysis (HNA) provides a basis to update the Housing Elements of the City’s Comprehensive Plan and zoning code and support future planning efforts related to housing fulfilling requirements in Oregon’s Statewide Land Use Planning Goal 10 addressing housing. The HNA includes multiple analysis elements, including a buildable lands inventory of Newberg’s existing residential land, an overview of historical and recent development trends at the local, state, and regional level affecting Newberg’s housing market, demographic and other factors affecting residential development in Newberg, a forecast for housing need in Newberg, and an estimation of residential land sufficiency to accommodate expected growth between 2021 and 2041.

1. Residential Buildable Lands Inventory

The residential buildable lands inventory (BLI) identifies the residential land base (tax lots in the UGB with appropriate residential plan designations), classifies those parcels by their development status, identifies and deducts constraints, and summarizes the total buildable area by zoning district. Parcels with remaining buildable lands are classified as “vacant” or “partially vacant” and can be assigned capacity for future residential development. In addition to land availability for future new development, the analysis uses assumptions for land needed for public right-of-way and other uses expected to occur on residential land and infill or redevelopment. The BLI is based on 2020 GIS data.

The BLI assigns the following land classifications:

- *Vacant land.* Tax lots that have no structures or have buildings with very little value (improvement values under \$10,000). These lands are subject to aerial imagery review.
- *Partially vacant land.* Tax lots that are occupied by a use but contain enough land to be further subdivided without the need of rezoning. (This uses a state safe harbor methodology.)
- *Developed land.* Land that is developed at densities consistent with zoning and improvements that make it unlikely to redevelop during the planning period.
- *Public land.* Land in public ownership (Federal, State, County, City, or other) is mostly considered unavailable for residential development. (This uses Yamhill County Assessment property tax exemption codes and verified by reviewing ownership.)
- *Undevelopable land.* Tax lots that are too small to practically have a dwelling unit (less than 3,000 square feet), buildable areas of a tax lot (after removing constraints) that are less than 3,000 square feet, or inaccessible tax lots.

The BLI also identified the following development constraints to remove from developable land, consistent with state guidance on buildable lands inventories: lands within floodplains and floodways, lands within natural resource protection areas, land within landslide hazards, and land with slopes over 25 percent. Table 1 provides an overview of the land classification and areas resulting from the BLI analysis.

Table 1. HNA Buildable Land Inventory Summary

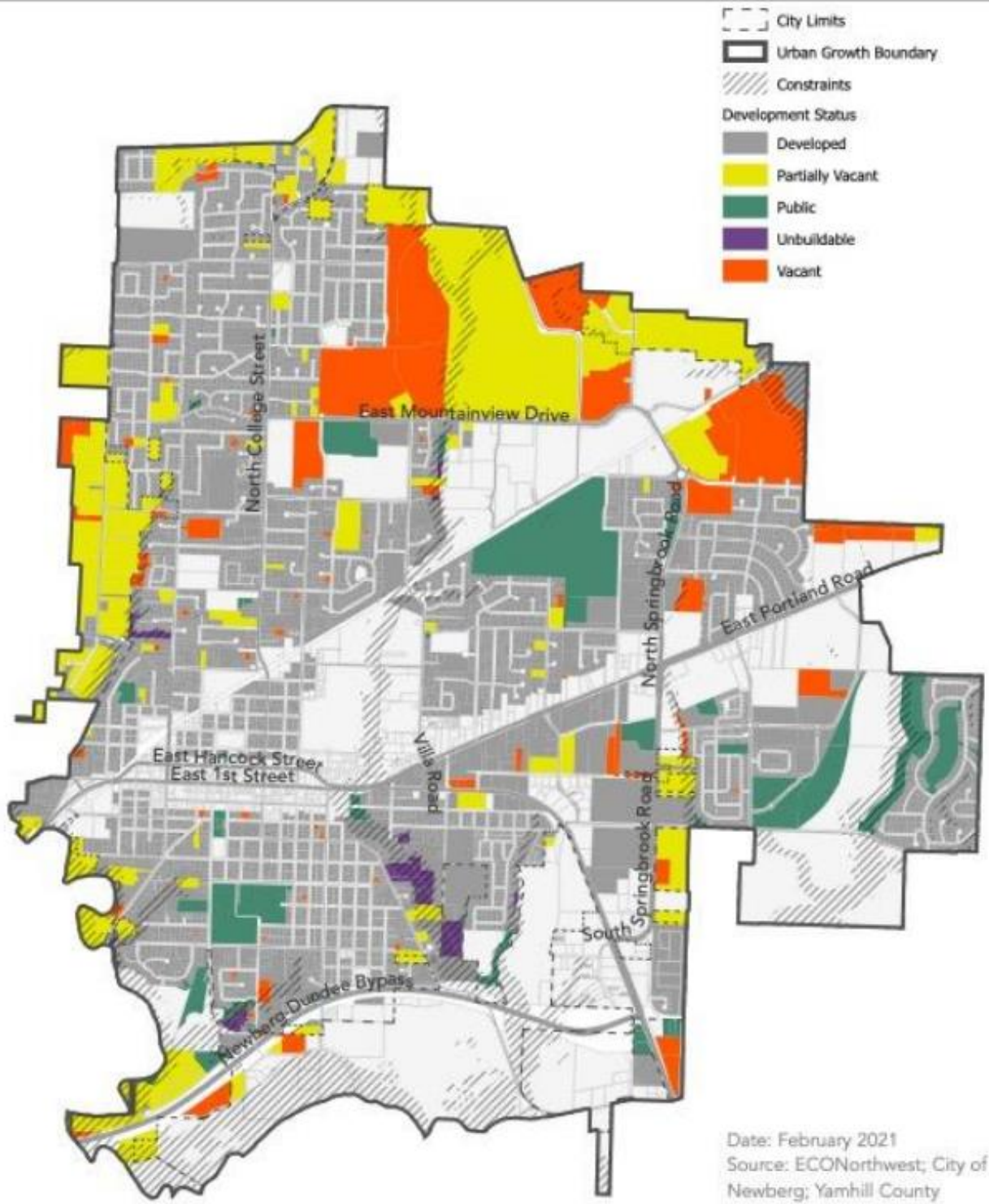
Generalized Plan Desig.	# of Lots	% of Lots	Acres	% of Acres	Committed Acres	Constrained Acres	Buildable Acres	Buildable Vacant	Buildable – Part. Vacant
Low-Density	2,740	40%	842	34%	585	68	188	29	159
Medium-Density	2,444	35%	583	24%	464	58	61	25	37
Mixed Use	63	1%	83	3%	73	-	10	6	4
High-Density	330	5%	121	5%	97	11	13	1	12
Public (R-1/R-2)	90	1%	138	6%	134	4	-	-	-
NW Specific Plan									
Low-Density	329	5%	68	3%	49	5	14	-	14
Medium-Density	130	2%	16	1%	16	-	-	-	-
Riverfront Master Plan									
Medium-Density	22	0%	53	2%	9	25	18	4	14
Mixed Use	4	0%	1	0%	1	-	-	-	-
High-Density	2	0%	4	0%	-	-	3	3	-
Springbrook District									
Low-Density	25	0%	329	13%	5	41	283	161	122
Mid-Rise	1	0%	11	0%	-	-	11	11	-
Village	5	0%	34	1%	-	-	22	7	15
Springbrook Oaks Specific Plan									
Low-Density	330	5%	79	3%	67	12	-	-	-
Medium-Density	138	2%	19	1%	18	1	-	-	-
Mixed Use	162	2%	85	3%	78	1	7	7	-
High-Density	75	1%	9	0%	8	1	-	-	-
Total	6,900	100%	2,474	100%	1,604	227	631	254	377

Committed – developed, unbuildable, right-of-way, and public land.

Springbrook Village -34 total acres, assumes 12 for commercial per Master Plan (accounted in EOA), 22 buildable for residential.

Of the 6,900 tax lots comprising 2,474 residential acres in the City’s UGB, approximately 50 percent are in low density residential plan designations, 26 percent in medium density designations, and five percent in high density designations. Across residential plan designation areas, approximately 631 acres are considered buildable, approximately 25 percent of the total acres within the City’s UGB. Just over 40 percent of this buildable area is on vacant tax lots. Figure 1 shows the location of these lands across the City.

Figure 1
Newberg Buildable Lands Inventory
 Residential Development Status



The analysis considered redevelopment potential of developed land designated as two-family or multi-family residential use that have single-family residences and that have a improvement-to-land value less than 1:1. Based on this criteria and discussions with the project’s Project Advisory Committee, Newberg assumes that the City has a capacity of 100 dwelling units for redevelopment.

2. Historical and Recent Development Trends

The HNA identified the following development trends that provide insight into the local housing market and that serve as key variables in forecasting the capacity of residential land to accommodate new housing and forecast future land needs.

- Trends in Housing Mix
 - o Newberg’s housing stock is predominantly single-family detached housing units (72 percent).
 - o Since 2000, Newberg’s housing mix has remained relatively similar with a slight shift in multi-family and single-family attached unit composition. Newberg’s housing stock grew by about 36% (about 2,284 units) between 2000 and the 2014-2018 period.
 - o Single-family detached housing accounted for the majority of new housing growth in Newberg between 2005 and 2020 (77 percent of new housing permitted).
- Trends in Tenure (owner- or renter-occupied)
 - o The homeownership rate in Newberg (approximately 62 percent) is lower than Yamhill County’s and similar to Oregon’s average.
 - o Homeownership in Newberg stayed stable between 2000 and 2012-2016.
 - o Nearly all Newberg homeowners (93 percent) live in single-family detached housing, while 59 percent of renters live in multifamily housing.
- Vacancy Rates
 - o According to the 2014-2018 census, the vacancy rate in Newberg was 5.5 percent, less than Yamhill County and just over half of the State’s vacancy rate.
- Government-Assisted Housing
 - o There are nine government assisted housing developments in Newberg with a total of 331 units.
- Manufactured Homes
 - o Newberg had 708 mobile/manufactured homes in 2000 and 540 in the 2012-2016 period, a decrease of 168 dwellings. In the 2012-2016 period, 86 percent of mobile homes in Newberg were owner-occupied.

3. Demographic and Other Factors Affecting Residential Development in Newberg

Multiple factors influence housing needs in Newberg, including that growth in housing will be driven by growth in population and that housing affordability will be a growing challenge. Trends also show that without substantial change in housing policy, on average, future housing will look a lot like past housing but changes in housing types are likely to move in the direction of smaller units and more diverse housing types. Key national, state, and local trends are listed below.

- National Trends
 - o Moderate new construction and a tight housing supply, particularly for affordable housing.
 - o A demand shift from renting to owning.
 - o Almost one third of American household spent more than 30% of their income on housing in 2016.
 - o Continued long-term growth and housing demand (as many as 12 million units between 2017 and 2027).

- Changes in household preferences – most notably the aging of Baby Boomers, housing demand from millennials, and growth of immigrants.
- Changes in housing characteristics including larger single-family units on smaller lots, larger multifamily units, and an increase in household amenities.
- State Trends
 - One in two Oregon households pays more than one third of their income toward rent.
 - The rate of K-12 homeless children increased by 12% from the 2013-2014 school year to the 2014-2015 school year.
 - There is a gap of 102,500 affordable units available to renters with extremely low incomes.
 - Low-wage work is a growing share of Oregon’s economy.
- Regional and Local Trends
 - Growing population will drive demand for housing in the City over the planning period.
 - An aging population has implications for future housing demand in Newberg. This includes seniors (Newberg currently has a smaller share of elderly residents than Yamhill County and state averages) and a larger proportion (28 percent) of younger people than Yamhill County and Oregon.
 - Income for residents living in Newberg (\$53,075 median household income, 2012-2016) is similar to the Yamhill County and state average. About 46 percent of Newberg households make less than \$50,000 per year.
 - Newberg is part of an interconnected regional economy. More than 6,000 people commute into Newberg for work and over 8,200 people commute out of the City for Work. About 23 percent of the people who work at businesses located in Newberg also live in the City.
 - Regional and local trends affecting affordability include:
 - Changes in housing costs – between January 2016 and August 2020, home sale prices in Newberg followed similar trends to other nearby cities. Since 2000, housing costs in Newberg have increased faster than incomes at a similar rate to Yamhill County, but have not increased as much as they have for Oregon.
 - Rental costs in Newberg are higher than average for Yamhill County and higher than statewide averages. The median gross rent in Newberg was \$1,114 and about 56 percent of renters paid \$1,000 or more per month between 2014 and 2018.
 - About 38 percent of all Newberg households are cost burdened, paying more than 30 percent of their income on housing costs.

4. Housing Need in Newberg

Identifying a forecast for housing need in Newberg relies on the official population forecast for growth in Newberg over the twenty-year planning period, information about Newberg’s housing market relative to Yamhill County, Oregon, and nearby cities, and the demographic composition of Newberg’s existing population and expected long term changes in the demographics of Yamhill County. Key assumptions used to develop this forecast include:

- *Population.* The twenty-year population forecast (2021-2041) indicates that the Newberg UGB will grow from 25,206 people in 2021 to 33,199 persons in 2041, **an increase of 7,995 residents.**
- *Persons in Group Quarters.* Group quarters can have an impact on housing need in cities with college campuses, prisons, or a large elderly population. George Fox University, which makes up the majority of student housing has indicated that they do not anticipate needs to expand student housing over the 2021 to 2041 planning period. The analysis assumes that **155 additional people will be housing in group quarters.**

- *Household size.* The analysis uses a state safe harbor to establish average household size, the figure from the current Decennial Census. For the 2021 to 2041 planning period, the analysis assumes an **average household size of 2.61 persons.**
- *Vacancy rate.* The analysis uses a state safe harbor to assume vacancy rate, the figure from the current Decennial Census. For the 2021 to 2041 planning period, the analysis assumes a **vacancy rate of 5.5 percent.**

Using these assumptions the total forecast of demand for new dwelling units within the Newberg UGB between 2021-2041 is 3,169 units (an annual average of 158 new dwelling units).

The analysis also is required to determine the average density and mix of needed housing over the 2021-2041 planning period. This considers (1) the number, density, and average mix of housing types that have actually occurred, (2) trends in density and average mix of housing types, (3) market factors that may substantially impact future development, and (4) the number, density, and average mix of housing types that occurred on buildable lands. The Project Advisory Committee recommended needed housing mix assumptions based on these factors and historic trends. This included assuming that 60 percent of needed dwelling units would be single-family detached, a decrease from the 2014-2018 share, and eight and 32 percent single-family attached and multi-family respectively, both an increase from 2014-2018. As shown in Table 2, when factoring in new units through redevelopment and new accessory dwelling units, 3,049 new dwelling units would be required on vacant or partially vacant residential land.

Table 2. Needed Dwelling Units

Structure Type	2014-2018 Share	2021-2041 Assumption	Needed Dwelling Units
Single-family detached	72%	60%	1,901
Single-family attached	5%	8%	254
Multi-family	23%	32%	1,014
Total New Dwelling Units			3,169
New units through redevelopment			100
New accessory dwelling units			20
Total Unit in ADU or Redevelopment			(120)
Single-family detached			1,881
Single-family attached			254
Multifamily			914
Total Units Requiring Vacant or Partially Vacant Land			3,049

When allocated across residential plan designations, 16, 20, and 17 percent of new dwelling units are forecasted across low-, medium-, and high-density residential plan districts respectively, while two percent are forecast in the Northwest Newberg Specific Plan area and 44 percent are forecast in the Springbrook District (See Table 3).

Table 3. Distribution of Needed Dwelling Units across Plan Designations

	Low-density	Medium-density	High-density	NW Specific	Springbrook	Total
Total DUs	491	621	524	68	1,345	3,049
% of DUs	16%	20%	17%	2%	44%	100%

5. Residential Land Sufficiency within Newberg

To identify the capacity of existing land within Newberg, needed densities were identified using average net densities, based on historic densities across the city and accounting for needed rights-of-way. Using these density assumptions, the unconstrained vacant and partially vacant land identified in the buildable lands inventory can accommodate 933 dwelling units in low density plan designations or zoning districts, 705 dwelling units on medium density land, and 308 dwelling units on high density land. Additionally, unconstrained buildable acres in low density designations of the Northwest Newberg Specific Plan can accommodate 68 dwelling units, and the Springbrook District can accommodate 874 single-family dwellings and 471 multifamily units. This represents 3,359 new dwelling units on 568 acres, an overall average density of residential capacity of 5.9 dwelling units per gross acre.

When comparing the demand for new housing with this identified capacity in residential land use designations, low and medium density areas have a sufficiency of 89 and 11 excess gross acres, while high density areas have a deficit of 11 acres (see Table 4).

Table 4. Residential Land Sufficiency

Designation	Capacity (Dwelling Units)	Demand for New Housing	Comparison (Supply-Demand)	Land Sufficiency (Gross Acres)
Low-density	933	491	442	89
Medium-density	705	621	84	11
High-density	308	524	(216)	(11)
NW Specific	68	68	0	n/a
Springbrook	1,345	1,345	0	n/a
Total	3,359			

The analysis also factors in employment uses in residential designations, public and semi-public land needs in residential designations, and land needed for group quarters. When including these additional land uses, a deficit exists in both medium and high-density land use designations, resulting in 78 acres of needed additional residential area (see Table 5).

Table 5. Residential Land Sufficiency including Other Uses

Designation	Land Sufficiency (Gross Acres)	Employment Uses (GA)	Public/Semi-Public Uses (GA)	Land for Group Quarters (GA)	Land Sufficiency (GA)
Low-density	89	(8)	(46)		35
Medium-density	11	(9)	(36)		(34)
High-density	(11)	(1)	(24)	(8)	(44)
NW Specific	0				n/a
Springbrook	0				n/a

B. Economic Opportunities Analysis

Similar to the HNA, the City's Economic Opportunities Analysis (EOA) provides a factual basis for evaluating employment land within the City's UGB. The EOA predicts the amount of land needed to accommodate future employment growth between 2021 and 2041, evaluates the existing employment land supply to determine if it is adequate to meet the need, and fulfill state planning requirements of a twenty-year supply of employment land outlined in Statewide Land Use Planning Goal 9. The EOA includes a summary of factors affecting future economic growth, projected employment growth and site needs, a buildable lands inventory, and land sufficiency reconciliation.

1. Factors Affecting Future Economic Growth

As a part of the regional economy, multiple factors impact economic development in Newberg. These impact new firms deciding to locate in the City, the ability of existing employers to expand and modernize, and the diversification of employment supported in the City. At a base level, these factors that impact a firm's ability to be productive include labor, land, local infrastructure, access to markets, materials, and entrepreneurship. Conducting long-range economic development planning using tools such as the EOA will allow Newberg to facilitate the growth of and access to these factors more effectively for local businesses. In addition, firms decide to locate and grow based on policy decisions including regulation, taxes, and financial incentives and indirect factors such as locating near industry clusters, quality of life, and innovative capacity. National, state, and regional trends impact economic development outcomes in Newberg, and key trends analyzed in the EOA are listed below.

- County and local employment growth
- Increases in regional economic diversity
- Changes in manufacturing and the concentration of manufacturing in Oregon
- Increases in automation
- Importance of small businesses in Newberg's economy
- Changes in the retail sector
- Continued increase in demand for energy
- A tight labor market that changed abruptly
- Availability of trained and skilled labor
- Lower household income and average wages
- Education as a determinant of wages
- Aging of the population and need for replacement workers
- Increases in racial and ethnic diversity

The EOA also examined employment trends in Newberg and Yamhill County. Key points included that Yamhill County increased employment between 3,874 jobs between 2008 and 2018, with the largest increases in education and health services, leisure and hospitality, natural resources and mining, and professional and business services. Employment in Newberg in 2018 accounted for approximately 27 percent of the County's employment total. Over that same period, Newberg saw an increase of 837 employees. The largest increases were in health care and social assistance and private education while the largest loss was in manufacturing. Regional employment projections in the Mid-Valley region (Linn, Marion, Polk, and Yamhill Counties) expect the greatest employment growth in private educational and health services, government, trade, transportation, and utilities, professional and business services, construction, and leisure and hospitality. Yamhill County accounts for approximately 14 percent of employment in these four counties.

The EOA highlights Newberg's competitive advantages and disadvantages that will affect economic development opportunities in Newberg.

Competitive Advantages

Location
Transportation
Access to Workers
Remote Workers
Access to Job Training
Small Business and Entrepreneurial Growth
Access to Agricultural Products
Collaborative Economic Development Partnerships
Tourism and Related Industries
Scenic Resources
Quality of Life

Competitive Disadvantages

Land Availability and Serviceability
Affordable Housing for Workers
Aging Population
Environmental and Climate Change Risks

2. Employment Growth and Site Needs

The EOA's estimate of employment land need and site characteristics for Newberg is based on expected employment growth and the types of firms that are likely to locate in Newberg over the 2021-2041 planning period. The employment projections in the EOA are based on Newberg's existing employment base and assumes future growth is similar to Yamhill County's long-term historical employment growth rates. The projection process includes four steps:

- *Establish base employment for the projection.* Start with the estimate of covered employment in Newberg, adjusted to reflect total employment in the city.
- *Project total employment.* The projection considers forecasts and factors that may affect employment growth over the 20-year planning period.
- *Allocate employment.* Employment is allocated to different land use types.
- *Estimate Land Demand.* Estimate general employment land demand based on employment growth and assumptions about future employment densities.

In 2018, Newberg had 9,675 covered employees (those covered by unemployment insurance). This does not include workforce such as sole proprietors, contractors or 1099 employees, among others. Covered employment in Yamhill County represents approximately 72 percent of total employment reported by the US Department of Commerce, and the EOA looked at each industry sector to identify its estimated total employment within Newberg, approximately 13,466 total employees within the Newberg UGB in 2018.

To establish the employment projection for the 2021-2041 planning period, the EOA uses a state safe harbor method allowing the City to assume that the current number of jobs in the Newberg UGB will grow during the 20-year planning period at a rate equal to the population growth rate provided in the most recent forecast published by Portland State University's Population Research Center. The forecast indicates that Newberg's population will grow at an annual average growth rate of 1.39 percent, resulting in an employment projection of 18,486 employees within the UGB by 2041, an increase of 4,452 employees (32 percent) between 2021 and 2041.

The EOA allocates this future employment into broad land use categories (see Table 6):

- *Industrial* – Forecast to increase to 32% of employment (creating 2,407 new jobs) in 2041, up from 25% in 2021. This is based largely on the City's economic development vision, strategy, goals, and policies in *A NewBERG Community Vision* and the *Newberg Economic Development Strategy Update*.
- *Retail Commercial* – expected to decrease from 11% of employment in 2021 to 9% by 2041 due to the national trend to purchasing goods online.

- *Office and Commercial Services* – expected to account for more than 1,000 new jobs (53% of employments) by 2041, up from 45% in 2008. Types of sectors expected to grow include health-care services and tourism-related industries (accommodation and food services).
- *Government* – expected to grow by more than 100 jobs, most in K-12 schools and public administration.

Table 6. Projected Employment Allocation

Land Use Type	2021		2041		Change 2021 to 2041
	Employment	% of Total	Employment	% of Total	
Industrial	3,509	25%	5,916	32%	2,407
Retail	1,544	11%	1,664	9%	120
Office	7,999	57%	9,798	53%	1,799
Government	982	7%	1,108	6%	126
Total	14,034	100%	18,486	100%	4,452

In estimating the amount of commercial land (retail commercial and office and commercial service above, industrial is analyzed below and government is analyzed in the PSP), consideration was given for employment located in residential plan designations and employment located in existing built space. The EOA assumes that the share of employment in residential land is expected remain the same as in 2018 (15.8 percent), and that 10 percent of new commercial employment will occur in existing space. This means 1,424 of the expected 1,919 new commercial jobs in Newberg will require vacant or partially vacant employment land. Using expected employment densities in these sectors, and accounting for land required for public right-of-way, the EOA forecasts a commercial land demand of 83 gross acres (7 acres for retail commercial and 76 acres for office and commercial services).

The EOA considers site characteristics that commercial businesses need, including:

- Space in an existing building,
- Land for construction of a building designed for the firm,
- Land for construction of a commercial center,
- Visibility of location, and
- Proximity/access to a major automotive route.

To calculate an estimate of demand for land for the 2,407 new industrial employees, the EOA identifies potential growth industries and the site needs for those industries. Given Newberg’s limited supply of a diverse type of existing industrial sites, the EOA conducts a survey of comparable cities in the Willamette Valley to align identified growth industries with the types of site needed. The growth industries identified seek to address two questions: (1) which industries are most likely to be attracted to Newberg, and (2) which industries best meet Newberg’s economic development goals. The selected target industries include:

- Advanced and General Manufacturing
- Technology and High-Tech Manufacturing
- Food/Beverage Production and Agricultural Products
- Forestry and Wood Products
- Aviation-Related Industries

To identify the site needs for these potential growth industries, and analysis of site characteristics including site size, slope, railroad access, highway access, and special utility needs was conducted. Newberg has 51 unconstrained vacant or potential infill sites (one larger than 10 acres with the majority smaller than 5 acres).

Newberg’s potential growth industries generally need land between 5-25 acres, with the potential of up to 100 acres. Given the limited selection of sites to base demand analysis on within Newberg, the EOA examines developed site employment in Albany, Corvallis, McMinnville, Newberg, Salem, and Woodburn. Allocating the 2,407 new industrial employees to sites based on distributions and employment densities from the comparative analysis, Newberg should expect to need 131 industrial sites covering 281 acres (see Table 7). Just over 60 percent of new employment is projected on sites less than five acres, approximately 27 percent on sites between five and 25 acres, and 12 percent on larger sites.

Table 7. Employment Site Needs

	Site Size (acres)				Total
	< 5 acres	5-25 acres	25-50 acres	> 50 acres	
New Employment by Site Size					
% of New Employment*	61%	27%	4%	8%	100%
# of New Industrial Employees	1,468	650	96	193	2,407
New Sites Needed					
Employees per Site*	12	90	98	225	
New Sites Needed in Newberg	122	7	1	1	131
New Land Needed					
Average Site Size*	0.7	9.2	24.5	96.6	
Acres of Land in Newberg	85	64	35	57	281

*Based on regional comparative analysis

When seeking land to address its employment land deficit, the EOA identifies site characteristics the City should target, including site size/acreage, land ownership, proximity/access to a major automotive route, topography of no or little slope, presence of natural features, and compatible surrounding land uses.

3. Buildable Lands Inventory

As completed in the HNA, a buildable lands inventory was conducted to identify commercial and industrial lands within the Newberg UGB available for development. The same inventory categories and development constraints were used as in the HNA (although the topography threshold was lowered to exclude lands with slopes greater than 15 percent rather than 25 percent). Table 8 provides an overview of the land classifications and areas resulting from BLI analysis.

Table 8. Employment Buildable Lands Inventory Summary

Generalized Plan Desig.	# of Lots	Acres	% of Acres	Committed Acres	Constrained Acres	Buildable Acres	Buildable - Vacant	Buildable - Potent. Infill
Commercial	353	266	27%	201	12	53	26	28
Commercial	338	163	17%	146	2	15	6	10
Riverfront	5	7	1%	4	2	1	1	-
Specific Plan	5	9	1%	3	2	4	4	-
P-QP (Hospital)	1	41	4%	32	1	8	-	8
SD - Hospitality	3	35	4%	16	5	14	4	10
SD - Neighbor.	1	11	1%	-	-	11	11	-
Mixed Use	242	217	22%	169	1	25	20	4
Mixed Use	63	83	9%	73	-	10	6	4
Riverfront	12	22	2%	19	-	3	2	-
Specific Plan	161	78	8%	77	1	-	-	-
SD - Village	6	34	4%	-	-	12	-	-
Industrial	172	434	45%	299	84	52	12	10
Industrial	161	246	25%	194	25	27	42	7
Riverfront	5	108	11%	64	41	3	20	-
Specific Plan	3	53	5%	35	18	-	3	-
SD - Employ.	3	27	3%	6	-	22	19	3
Other - Airpark	2	54	6%					

Industrial	1	12	1%	<i>(discussed in other analysis)</i>				
P-QP	1	42	4%					
Total	769	971	100%	669	97	130	88	42

Springbrook Village -34 total acres, assumes 12 for commercial per Master Plan (accounted in EOA), 22 buildable for residential.

Of the 917 employment acres across 769 tax lots in the City’s UGB, approximately 45 percent are in industrial plan designations, 27 percent in commercial designations, 22 percent in mixed use designations, and six percent in other designations. Across employment plan designation areas, approximately 130 acres are considered buildable, approximately 13 percent of the total acres within the City’s UGB. Just over two thirds of this buildable area is on vacant tax lots. Figure 2 shows the location of these lands across the City.

The EOA also identifies potentially redevelopable land within the UGB, land that may develop more intense employment uses in the future. Newberg has 92 acres of unconstrained potentially redevelopable land across 18 sites (26 acres in commercial plan designations and 66 acres in industrial plan designations). Vacant land is present at Sportsman Airpark, however given the additional regulations (from the FAA, Airport Master Plan, or Development Code) and limited uses, only a 10.6 acre portion available for sale is included in the City’s BLI.

The analysis also indicates the availability of short-term versus long-term employment lands. Short-term availability is defined by the state as land that is ready for construction within one year of an application for a building permit or request for service extension. Considering access to water, sanitary sewer, and stormwater, of the 130 acres of unconstrained buildable land on vacant and potential infill tax lots, 58 acres of commercial and mixed use and 44 acres of industrial land were determined to be in the short-term supply (approximately 78 percent of all unconstrained buildable land).

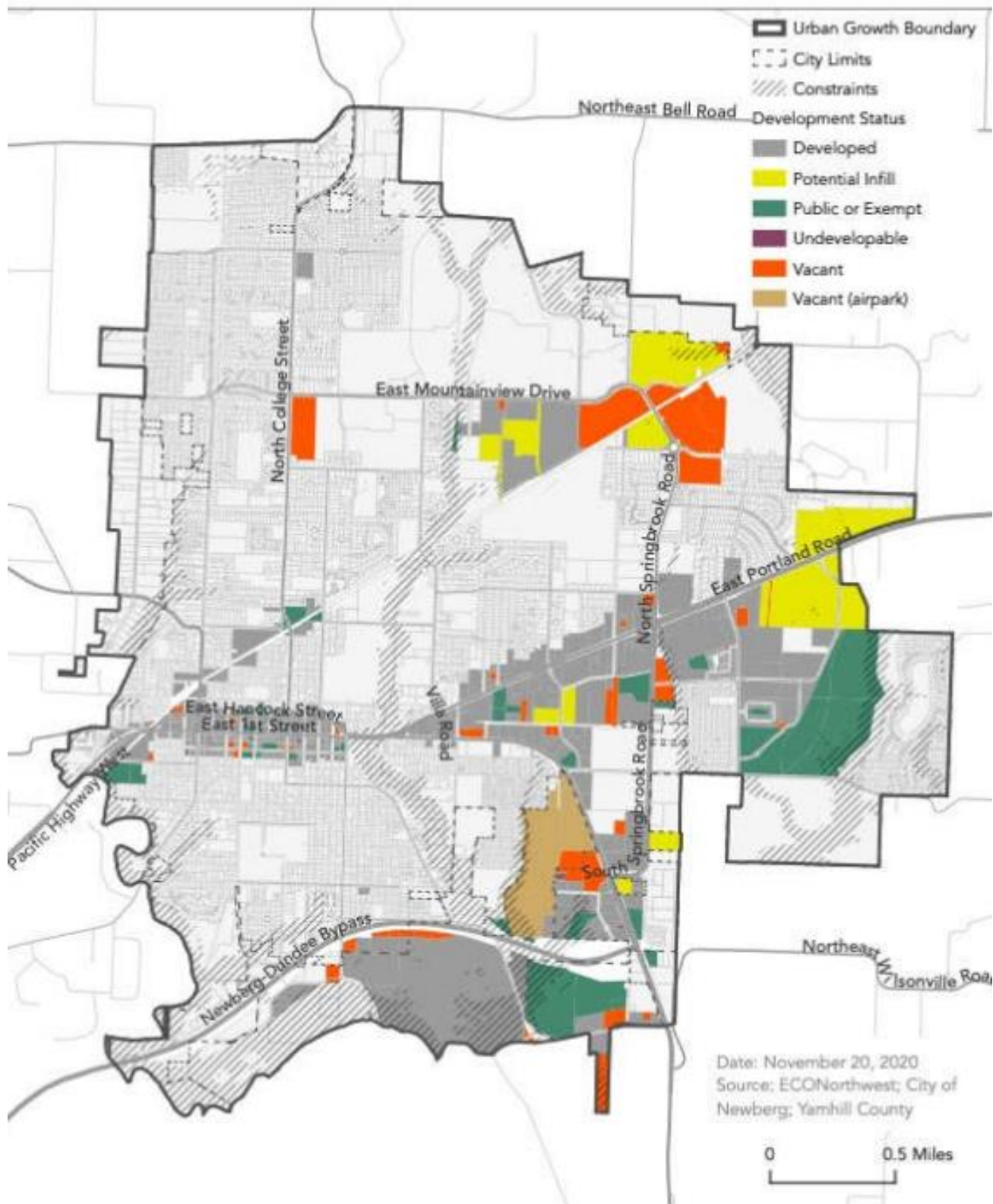
4. Land Sufficiency

The supply of buildable unconstrained commercial land in Newberg is 104 gross acres. Between 2021-2041 the commercial sectors are expected to need 83 acres, resulting in a commercial surplus of 21 acres. In evaluating the vacant site size types required for future industrial growth, Newberg has a deficit of sites less than five acres in size (89 sites, 62 acres), five to 25 acres (6 sites, 55 acres), and 25 to 50 acres (1 site, 35 acres). The WestRock Mill site serves as the one site larger than 50 acres projected in the EOA. This means that across site size categories, Newberg needs 96 sites and 152 acres of industrial land, as shown in Table 9.

Table 9. Employment Land Need

	Site Size (acres)				Total
	< 5 acres	5-25 acres	25-50 acres	> 50 acres	
Number of Vacant Sites (BLI)	33	1	-	1	35
New Sites Needed	122	7	1	1	131
Comparison of Land Supply and Need (Land Surplus or Deficit)	(89)	(6)	(1)	-	(96)
Acres of Land Needed	(62)	(55)	(35)	-	(152)

Figure 2
Newberg Buildable Lands Inventory
 Commercial and Industrial Development Status



C. Newberg Public and Semi-Public Land Need 2021-2041

The Newberg Public and Semi-Public Land Need 2021-2041 analysis provides a factual basis for land demand occurring largely independently of market forces and that can generally be directly correlated to population growth. These uses can include schools, governments, churches, parks, and other non-profit organizations.

1. Public Land Needs

Public land needs are divided into three categories:

- *Municipal.* The City of Newberg indicated 15.4 acres of land needed for city-owned facilities between 2021-2041 across residential and commercial plan designations. Yamhill County indicated a need of two acres for bus parking and a future Park ‘n’ Ride facility. The Oregon Department of Transportation indicated 11.1 acres would be required for Phase 2 of the Newberg-Dundee Bypass.
- *Parks.* Newberg’s future park need is based on analysis in the Chehalem Park and Recreation District’s Master Plan and adopted level of service (acres per 1,000 people) in the Newberg Comprehensive Plan. The level of service for neighborhood parks (2.5 acres) and community parks (5.0-8.0 acres – 5.0 acres assumed in this analysis) results in projected park need of 60 acres to meet the projected 7,995 population growth between 2021-2041. The analysis distributes park need equally across residential plan designations.
- *Schools.* The Newberg School District indicated that they do not anticipate needing additional land over the 2021-2041 planning period at this time.

2. Semi-Public Land Needs

Semi-public land includes churches, non-profit organizations, and related semi-public uses. Newberg currently has 98.1 acres of land used for semi-public uses, resulting in 4 acres per 1,000 residents. The projection assumes that this ratio will continue as Newberg grows, which means that the City will need 32 acres to meet the needs of forecasted population growth.

The total public and semi-public uses will require 120.5 acres in the 2021-2041 planning period, including 105.3 acres in residential designations, 2.9 acres in commercial designations, and 12.3 acres in industrial designations (see Table 10).

Table 10. Public and Semi-Public Land Need

Use	Estimated Land Need			Commercial	Industrial	Total
	Low Density	Residential Medium Density	High Density			
Municipal	7.0	9.3	-	2.2	10.0	28.5
Parks	20.0	20.0	20.0	-	-	60.0
Semi-Public	19.1	6.4	3.5	0.7	2.3	32.0
Total	46.1	35.7	23.5	2.9	12.3	120.5