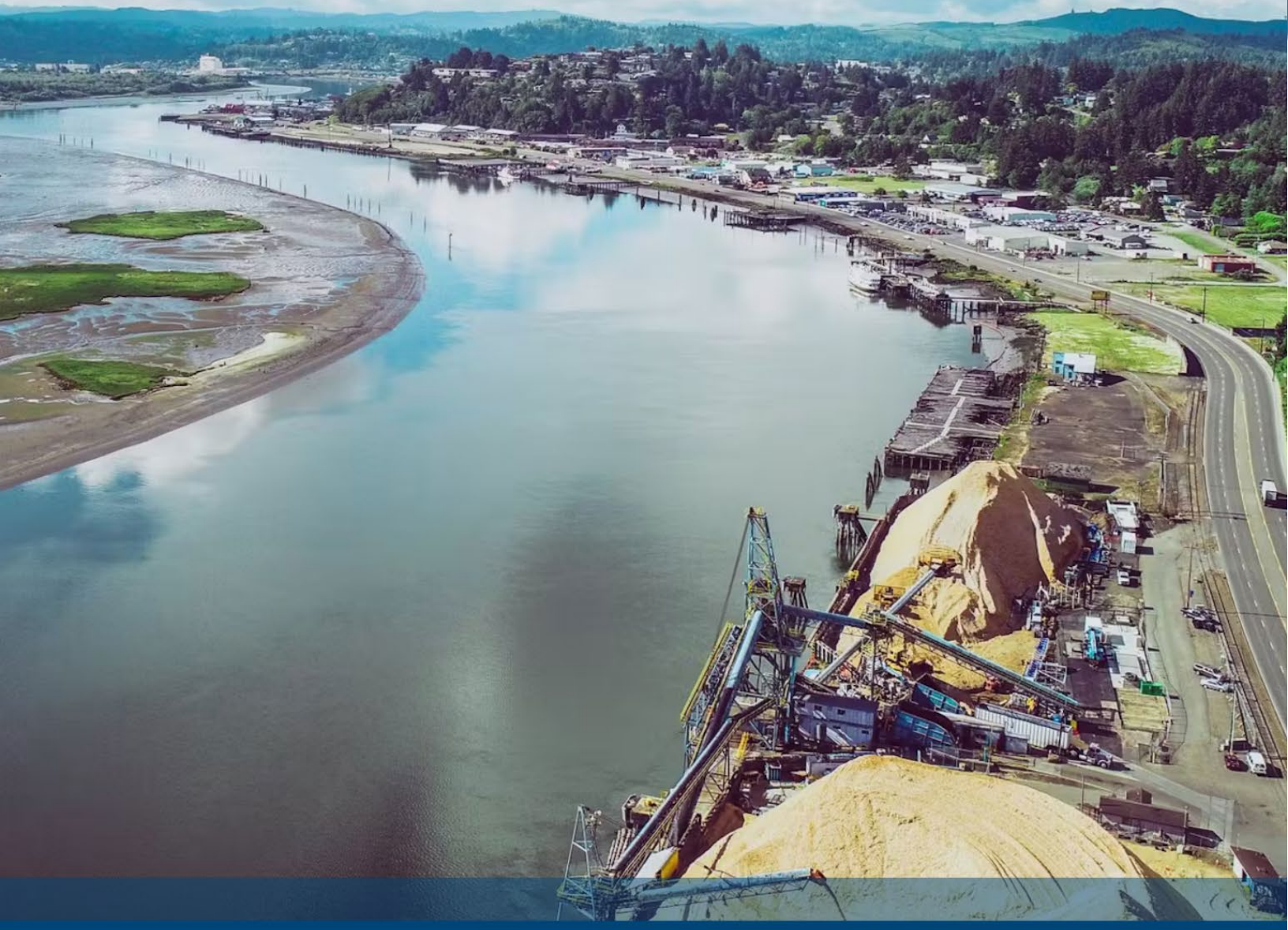
Oregon's Seaport… Port of Coos Bay

OREGON INTERNATIONAL
Port of Coos Bay

2025 Strategic Business Plan

Amendment 1 – Adopted 02/19/26



For: The Oregon International Port of Coos Bay

NOVEMBER 2025

Facilitated by:

POINTS CONSULTING

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1. Executive Summary & Introduction

Oregon International Port of Coos Bay contracted with Points Consulting (PC) in May 2025 to produce an updated Strategic Business Plan (SBP) to guide the Port's goals and investments for the future. The plan is intended to meet the requirements of the State of Oregon and provide guidance for the Port Commissioners and staff. Per the requirements of OAR 123-025-0016, ports in Oregon are required to complete an SBP every 10 years, which must meet the standards and requirements laid out in the Statewide Ports Strategic Business Plan. Per an Intergovernmental Agreement between the Oregon International Port of Coos Bay and the Oregon Business Development Department (Business Oregon), executed in 2019, the Port must update the SBP every five years,

The Port of Coos Bay is one of only two international ports in Oregon, making the Port uniquely positioned to impact both the state's economy and the regional economy of Oregon's South Coast. Operating in Coos County, the region is highlighted by its maritime identity and aspirations for diverse economic development opportunities that coexist with the bay's unique and diverse ecosystem. Though the Coos County economy has contracted in recent years, the Port sees many opportunities to activate community and economic development projects with a positive return-on-investment for the community.

Due to its real estate assets in Charleston, the North Spit, the Coos Bay Rail Line, and the Upper & East Bay, Port staff serve the community in many different functions. This Strategic Business Plan (SBP) represents the port's new leadership's desire to be transparent and collaborative while casting a ten-year vision for economic development.



The Strategic Direction & Action Plan is the most important component of the SBP, charting the Port's direction for the next ten years. Many of the district's needs are addressed within the Goals and Objectives section. Here, the plan addresses many areas of the Port's operation, including property, financials, and management. Each goal has associated objectives that can be used as smaller actions used to reach the overarching goals. In short, these Goals & Objectives include:

Community Engagement

In the process of facilitating this Strategic Business Plan, the Port requested a thorough community engagement effort to ensure abundant collection of public input. From May 2025 through October 2025, our team visited Coos Bay three times, conducted 24 interviews of individuals and groups of stakeholders, and hosted a public open house with an estimated 120-150 attendees. Broader engagement included a community survey in which 900 qualified responses were collected amounting to a 4%+ response rate of the adult population at the time of our survey.



Property Goals

- Goal 1: Set priorities for involvement in regional economic development
- Goal 2: Solidify involvement in tourism and recreation industries
- Goal 3: Revitalize Charleston, including the Marina and Shipyard to support maritime industries

Financial Goals

- Goal 1: Prioritize spending on most critical infrastructure components
- Goal 2: Improve communication of financial data

Management Goals

- Goal 1: Continue advancing policies of openness and transparency while developing more channels for community engagement

Environmental & Emergency Response Goals

- Goal 1: Improve understanding of potential environmental impacts of and on Port activities
- Goal 2: Improve emergency response preparedness and enhance communication to the community

Regional Coordination and Communication Goals

- Goal 1: Continue growth of public transparency and communicate new opportunities to the community
- Goal 2: Improve communication and coordination with regional and Tribal governments

Pacific Coast Intermodal Port Goals

- Goal 1: Shed light on remaining timeline and plan for the PCIP
- Goal 2: Capitalize on federal and state funding efforts for regional economic development

The fully detailed Strategic Direction & Action Plan can be found in the body of the report here.

Capital Improvements Plan

The Capital Improvements Plan is another important aspect of the SBP. The plan is critical to Port actions, as it prioritizes assets and infrastructure components for the Port to address. This piece is intended to serve this purpose for the first five to six years of the 20-year planning horizon.

Our team coordinated with Port staff and the Port Commission to establish suggested actions related to Port assets. The Capital Improvements Plan includes many current critical issues impacting the Port's inventory of properties. Port staff and Commissioners may need to revise these opinions in light of changes to economic opportunities and fortunes in the future. Current perspectives of Port Commissioners are summarized below.

Charleston Assets

- Docks at the Marina: Maintain OR Upgrade/Improve
- Commercial and retail storefront at the Marina: Maintain OR Upgrade/Improve
- RV Park at the Marina: Maintain OR Upgrade/Improve
- Shipyard commercial and fabrication: Upgrade/Improve
- Shipyard docks: Upgrade/Improve
- Shipyard storage: Maintain OR Repurpose
- Vacant properties: Divest

Through the community survey, we found that 72% of respondents feel the Port is "Very important" or "Extremely important" to the regional economy, 55% of respondents support further commercial or industrial development on Port-owned land, and investments in Charleston were most supported, followed by the CBRL and the PCIP.

Railroad Assets

- Coos Bay Rail Line: Upgrade/Improve
- Rail yard: Divest



North Spit Assets

- Pacific Coast Intermodal Port Project: Continue as is
- Effluent outfall/lake property: Maintain OR Continue as is

Upper & East Bay Assets

- Tyree Oil property: Divest
- Downtown Hub Building: Maintain OR Continue as is
- Terminal One: Divest
- Eastside Residential property: Divest
- Eastside Industrial property: Divest



The fully detailed Capital Improvements Plan can be found in the body of the report here.

Financial Profile

The Strategic Direction & Action Plan and the Capital Improvements Plan were directly informed by our on-site qualitative analysis, along with hard quantitative data. Overall, the Port is in a relatively healthy position in terms of finances, operating near break even in its general fund over the last ten budget years. Our analysis of financial data included risk analysis, and the Port is beginning to face mounting debt and interest payments. Principal debt payments have increased fourfold since the 2015/16 budget year, rising from $160,000 to over $800,000 expected in the 2025/26 budget year.

Additionally, interest debt payments have increased tenfold in the same time, rising from $60,000 to over $600,000 in the 2025/26 budget year. Continued infrastructure maintenance and rehabilitation of the CBRL has been a consistent problem as well, with the Port spending over $154 million since the 2015/16 budget year.

Socio-economic Profile

The economic profile of the Port District included overall demand analysis and existing markets. In general, the Coos County economy has stagnated. The County lags behind the State of Oregon and the nation in terms of employment growth, with total employment remaining below pre-pandemic levels, as of 2023. Healthcare & Social Assistance (13%), Retail Trade (13%), and Accommodation & Food Services (11%) represent the top employing sectors in Coos County. Meanwhile, jobs within Agriculture, Forestry, Fishing, & Hunting are five times more concentrated relative to the U.S.

When considering specific industries with 100 workers or more, the fastest growing industries over the last decade are Residential Building Construction (+70%), Automotive Repair & Maintenance (+49%), and Home Health Care Services (+44%). Investments here could be beneficial as they each represent growing demand in the District. International trade represents a key element of the regional economy as well, where $270 million worth of cargo was exported from Coos Bay in 2022, up from less than $100 million in 2003. Tourism is an industry of growing importance to Coos County, and one that could be further capitalized on where approximately $1,170 dollars in local tax revenue is generated per worker in the County (which is lower than three of the other six Oregon coastal counties).

The demographic profile of the District provides insight into some challenges of the region. Overall, the area is slowing in terms of population growth with Coos Bay (-1%), North Bend (+5%), and Coos County (+2%). All three have lagged behind Oregon and the U.S. since 2010. By 2045, the state (Portland State University's Population Research Center) forecasts North Bend to grow slowly, but for Coos Bay and Coos County to stagnate and even decline in population. Furthermore, Coos County has a greater share of older residents (aged 65+) and a lower share of prime working-age residents (aged 25 to 54) than both the state and nation.



Introduction

Process Overview

As part of this SBP, PC performed extensive regional research, conducted interviews and hosted workshops with Port Commissioners and staff, reviewed socioeconomic data, analyzed the Port's assets, and carried out several modes of community outreach to complete this plan. Community outreach included public meetings, a community survey, and one-on-one interviews with key personnel.

To avoid confusion, PC defines a few terms below:

- The Port or The Port of Coos Bay refers to the organization, Oregon International Port of Coos Bay.
- The Port District or the Port Tax District refers to the area within Coos County that pays taxes to the Port.
- The Port vicinity refers to the area in which the Port has historically developed, operated, and sold properties.

Port History

The Port of Coos Bay was founded as a port district in 1909 and was reorganized in 1912 as a formal district with the authority to levy taxes. It is one of three port districts in Coos County and is the largest district of the three. Within the Port's boundaries lies the Coos Bay harbor, which has played a critical role in the region's development. The harbor serves as a multimodal connection point for shipping wood products produced by regional mills. Though smaller than it once was, the timber industry remains an important source of employment in the region.

The Port functions both as a facilitator of the harbor's maritime industry and as an economic development and transportation advocacy organization. It promotes marine and industrial growth throughout southwest Oregon and the state overall, as well as economic activity in national and international markets.[1] The Port provides a wide range of facilities and infrastructure that support the regional economy. Among these is the Charleston Marina Complex, which serves various maritime market segments and includes the Charleston Ice Dock, the Charleston Boatyard, the Charleston Marina RV Park, and a U.S. Coast Guard installation.

In 2010, the Port acquired the Coos Bay Rail Line, which connects Coos, western Douglas, and western Lane counties to the North American freight rail system. Since 2018, the Port has served not only as the owner but also the operator of the line. The rail system offers

[1] "About the Port," Oregon International Port of Coos Bay, accessed July 2, 2025, https://www.portofcoosbay.com/about-the-port.

a more cost-effective option for transporting goods and is especially important to the region's forest products industry. The Port also owns several marine industrial sites and, as the non-federal sponsor, helps maintain the federal navigation channel, ensuring access to private marine terminals.

Now, as Oregon's Gateway and through its designation as a state Port, the Port of Coos Bay is uniquely positioned to influence the local economy. Through its involvement in regional economic development, the Port implements dynamic programs aimed at generating new industrial operations in the bay area. In this role, the Port supports the continued growth and development of Oregon's south coast.

Mission & Vision

The Port updated its mission and vision as part of the strategic planning process. The 2025 mission and vision are shown below, along with the new Strategic Direction & Action Plan in the following section.

Our Mission

Promoting sustainable development that enhances southwest Oregon and the State in the international economy.

Our Vision

The Coos Bay area is growing, driven by the Oregon International Port of Coos Bay's public managed investments in multi-modal transit, maritime industries, and tourism. Long-term planning and improvements for the Port's Charleston facilities, Coos Bay Rail Line, and Marine Operations drive both private-sector and public agency investments in the seafood industry, recreational tourism, research, and education. Oregon's bay area is prospering from a healthy ecosystem, a diversified regional economy, and growing employment opportunities.

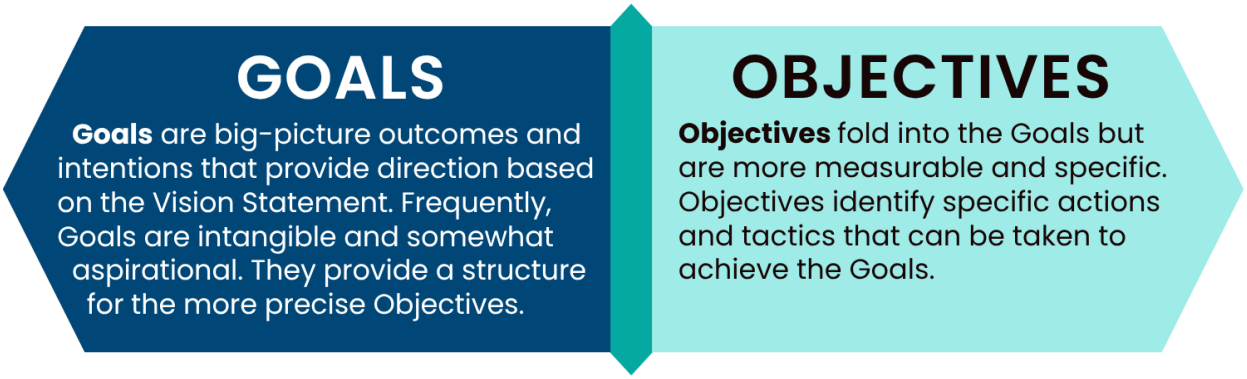


2. Strategic Direction & Action Plan

The Strategic Direction & Action Plan is the most critical aspect of a Strategic Business Plan (SBP). It accounts for the socioeconomic, community, and external factors uncovered during the SWOT analysis and aligns those factors with specific goals and objectives that Port leaders can address. These goals and objectives are consistent with the Port's vision for economic prosperity. Ideally, over the next five to 10 years, the Port will be able to return to these goals and objectives in order to measure the performance of the Port. At its core, the Strategic Direction & Action Plan answers the two fundamental questions:

- "Where do we want to go as a Port?" and
- "How are we going to get there?"

There are two layers to the Strategic Direction & Action Plan:



The Port may continuously review and amend these goals and objectives over the next five years, as needed.

To visualize how to prioritize, link successful projects, and systematically pursue funding, objectives were given a timeframe for action. Figure 2.1 serves as a key for the timeframes, providing an estimate of how and when each objective may take place. The Port may review and amend this timeline and choose to begin objectives prior to the time estimate in the key.

Figure 2.1 Action Plan Timeline Key



Source: Points Consulting & Port Commission, 2025

Property Goals

The SBP property goals may involve further marine, industrial, commercial, and recreational involvement. We believe the Port should focus on regional economic development, the tourism and recreation industries, and revitalization of its Charleston properties. Table 2.1 reports the full Goals & Objectives for Port property.

Goal 1: Set priorities for involvement in regional economic development

Promoting a diversified and healthy regional economy is at the heart of the Port's mission and vision. Whether through addressing local housing needs, supporting local industries, or selling properties to the private sector, the Port has great potential to make meaningful impacts for the regional economy. Other strategies should be considered as well, such as mitigation banking or complementing growing industries (Table 3.9 of the full plan).

Goal 2: Solidify involvement in tourism and recreation industries

Aside from supporting overall regional economic development, tourism and recreation are key industries for coastal counties. The industries are already established clusters in Coos County and are growing as well. The Port should collaborate with other regional organizations to support the industries and take advantage of them as Lincoln and Tillamook Counties have done (Table 3.17 of the full plan) to support other local objectives.

Goal 3: Revitalize Charleston, including the Marina and Shipyard to support maritime industries

The Charleston Marina (and the Charleston community itself) is at a tipping point. If the area improves, all local businesses will benefit. If it does not improve, the area is at risk of slowly sliding down a path toward dilapidation and vacancy. While potential financial benefits from the PCIP down the road would be helpful, Charleston is the core of the local maritime industries supporting many local workers and businesses and is in need of investment.

Table 2.1: Property Goals & Objectives

Objective	Actors	Timeframe
Goal 1: Set priorities for involvement in regional economic development		
1.1: Determine strategic use of mitigation banking for selected properties	Port of Coos Bay	Long-term
1.2: Pursue methods of industry diversification outside of wood products industries (with assistance of South Coast Development Council and Business Oregon)	Port of Coos Bay; SCDC; Business Oregon	Mid-term

1.3: Determine how to contribute to community workforce housing needs (either using existing property or by partnering with other local entities)	Port of Coos Bay; City of Coos Bay; City of North Bend; local housing groups	Mid-term
1.4: Identify potential properties to sell	Port of Coos Bay	Short-term
1.5: Identify advantageous properties for potential purchase or partnership	Port of Coos Bay	Long-term
Goal 2: Solidify involvement in tourism & recreation industries		
2.1: Improve recreational assets on Port properties, particularly trails, boat launches, and public docks	Port of Coos Bay	Long-term
2.2: Increase collaboration/ partnership with the Bandon Dunes Foundation, Coos Bay-North Bend-Charleston Visitor & Convention Bureau (VCB), and Travel Southern Oregon Coast (TSOC)	Port of Coos Bay; Bandon Dunes Foundation; the VCB; TSOC	Short-term
2.3: Consider sitting on a tourism board to increase engagement in the tourism and recreation industry	Port of Coos Bay (research tourism boards)	Long-term
Goal 3: Revitalize Charleston, including the Marina and Shipyard to support maritime industries		
3.1: Convene stakeholders to identify mission, vision, values, and leadership for Marina-related activities	Port of Coos Bay; Charleston Advisory Committee; Charleston Fishing Families; Charleston residents; local commercial fisherman; Shipyard operators; Marina business operators	Short-term
3.2: Identify local champions for taking pride of ownership over existing facilities that the Port can partner with during clean up and improvement process	Port of Coos Bay; Charleston residents; Marina business operators; Shipyard operators	Mid-term
3.3: List all maintenance and repair issues with expected cost of replacement and potential demolition, use as a basis for prioritizing grant funding requests, financial plans, legislative requests, and loans	Port of Coos Bay; Charleston Stakeholders	Mid-term

3.4: Once vision and priorities list is determined, hire an internal or outsourced grant writer to assist with funding requests	Port of Coos Bay	Mid-term
3.5: Estimate total cost of removal for abandoned ships in the shipyard and create long-term plan for removal of future derelict ships	Port of Coos Bay	Long-term
3.6: Once funding is secured, work on a Master Plan for long-term design of the Charleston Marina	Port of Coos Bay; Charleston Advisory Committee	Mid-term
3.7: Conduct independent rate analysis for slip fees, moorage fees, and ice costs	Port of Coos Bay	Short-term
3.8: Improve hours and availability of staff at Port office and ice plant	Port of Coos Bay	Mid-term
3.9: Observe facilities and study strategies of nearby ports with recently updated docks (e.g. Port of Bandon or Port of Umpqua)	Port of Coos Bay	Long-term
3.10: Recruit appropriate retail, commercial, and food service businesses to vacant commercial properties at the Marina	Port of Coos Bay	Long-term
3.11: Coordinate with Coos County, City of Coos Bay, and the DLCD related to Charleston's best interests for future UGB expansion of the City of Coos Bay	Port of Coos Bay; Coos County; City of Coos Bay; Charleston Stakeholders	Long-term
3.12: Coordinate with Charleston Master Plan to create Shipyard Revitalization/Reinvestment Plan	Port of Coos Bay: Charleston Advisory Committee; Shipyard Operators	Mid-term

Source: Points Consulting, Port Staff, & Port Commission, 2025

Financial Goals

The SBP financial goals may focus on property acquisition, debt management, or reserves. To maximize financial stability, the Port should prioritize its most critical infrastructure components and improve the communication of its financial data. Table 2.2 reports the full Goals & Objectives for the Port's financial situation.

Goal 1: Prioritize spending on most critical infrastructure components

In addition to the SBP, a second core aspect recommended by statewide guidance for Port planning is the Capital Facilities Plan. This plan would describe the needed improvements to the Port's land, buildings, facilities, and equipment for the next 10-20 years, including full cost estimates and potential funding sources. To commission this plan would provide greater detail and enhance Port decision making with regard to the Port's current inventory of assets.

Goal 2: Improve communication of financial data

Meanwhile, the Port's current practice of reporting larger projects and funding opportunities in the Special Project Fund may create some confusion regarding publicly available budgets. As of the last three budget years (Figures 2.5 and 2.6 of the full plan), the Special Project Fund has the vast majority of Port funding and expenses towards projects. Shifting these funds to which areas of Port activities they are supporting (Charleston, CBRL, etc.) improves communication with the public and may better show just how costly Port operations are.

Table 2.2: Financial Goals & Objectives

Objective	Actors	Timeframe
Goal 1: Prioritize spending on most critical infrastructure components		
1.1: Conduct official Capital Facilities Plan per Oregon Statewide Port guidance to put all assets to the highest and best use for the regional economy, including potential divestment	Port of Coos Bay	Short-term
1.2: Obtain maintenance/replacement estimates from professional trades people on most critical assets	Port of Coos Bay	Mid-term
1.3: Conduct pro forma analysis of selected properties on assumptions of keeping, selling, or leasing out	Port of Coos Bay	Mid-term
1.4: Act on decisions of in-depth financial/pro forma analyses	Port of Coos Bay	Mid-term
1.5: Analyze contract duration and negotiate with the State of Oregon for higher fees to managing statewide dredging projects	Port of Coos Bay	Short-term
Goal 2: Improve communication of financial data		
2.1: Revise financial statements to disaggregate special projects and overhead into more appropriate buckets, such as Charleston Operations or the CBRL (or distribute on a pro rata basis)	Port of Coos Bay	Mid-term
2.2: Separate sources and uses of grant funds to demonstrate priorities for pursuit or uses of grant funds and to isolate unrestricted funds	Port of Coos Bay	Long-term

Source: Points Consulting, Port Staff, & Port Commission, 2025

Management Goals

The SBP management goals may touch on issues of policy and procedure, staffing, or board development. The Port should also focus on continuing its values of openness and transparency. Table 2.3 reports the full Goals & Objectives for Port management.

Goal 1: Continue advancing priorities of openness and transparency while developing more channels for community engagement

Advancing the Port's priorities of openness and transparency will increase the public's trust in the Port and its activities. More channels for community engagement will also further this goal and therefore goes hand in hand. Part of the Port's mission and vision is to serve the community of its district, and more ways to collect feedback can help the Port do this effectively.

Table 2.3: Management Goals & Objectives

Objective	Actors	Timeframe
Goal 1: Continue advancing priorities of openness and transparency while developing more channels for community engagement		
1.1: Determine areas of interest to be addressed by additional advisory committees that align with requirements of ORS 285A.660	Port of Coos Bay	Short-term
1.2: Formulate meeting and communication process and policies for new advisory committees	Port of Coos Bay; Advisory Committees	Short-term
1.3: Ensure clear communication of biennial report to the Legislative Assembly (per ORS 777.937)	Port of Coos Bay	Mid-term
1.4: Conduct staff learning trips to other Ports according to an appropriate comparison set that are dealing with similar management challenges	Port of Coos Bay	Long-term
1.5: Identify areas of Port Operation that could best utilize increased staff capacity if funds were available	Port of Coos Bay; Advisory Committees	Mid-term
1.6: Conduct staff skills inventory and determine if more roles are needed to optimize Port operation impact and execute goals	Port of Coos Bay	Mid-term
1.7: Design commissioner subgroups into particular areas of interest so commissioners can collaborate in the best interest of the community and the Port	Port of Coos Bay	Long-term

Source: Points Consulting, Port Staff, & Port Commission, 2025

Environmental & Emergency Preparedness Goals

The Port of Coos Bay benefits many residents in Coos County through economic and recreational opportunities. To maximize these benefits, the Port has the responsibility to consider the environment in its operations. This consideration also includes response preparedness to unique emergencies that may occur. For these reasons, the Port should improve its understanding of the environment and improve its emergency response preparedness. Table 2.4 reports the full Goals & Objectives for environmental and emergency response.

Goal 1: Improve understanding of potential environmental impacts on and of Port activities

There are many blue economy (or maritime) jobs in the Port District. These include commercial fisherman but also several experts in marine science and research. For this reason, the Port should spend time to improve its understanding of how its operations may impact the environment. Unique geographic characteristics also make the Port susceptible to environmental challenges, and thus should be investigated as well.

Goal 2: Improve emergency response preparedness and enhance communication to the community

The Port participates in the Harbor Safety Committee and the governor's office has been interested in greater action from the Port on this front. Additionally, the Port has several properties and economic interests in ensuring the community and its staff are prepared in the case of a potential coastal emergency. Funding may also be available to the Port to address these issues.

Table 2.4: Environmental & Emergency Preparedness Goals & Objectives

Objective	Actors	Timeframe
Goal 1: Improve understanding of potential environmental impacts on and of Port activities		
1.1: Enlist expertise of local and statewide environmental experts on advisory committees	Port of Coos Bay; Advisory Committees	Short-term
1.2: Improve understanding of potential environmental partnerships to mitigate or improve the health of Coos Bay	Port of Coos Bay; Potential Appropriate Advisory Committee	Mid-term
1.3: Identify funding opportunities related to environmental sustainability to complement local industry	Port of Coos Bay; Potential Appropriate Advisory Committee	Long-term
Goal 2: Improve emergency response preparedness and enhance communication to the community		
2.1: Adopt an official emergency response plan, including tsunami evacuation routes and focusing on areas such as the North Spit and Charleston	Port of Coos Bay; Coos County; Regional Coast Guard	Mid-term

2.2: Coordinate or take the lead on an emergency management plan for a Cascadia Subduction Event	Port of Coos Bay; Coos County; City of Coos Bay; City of North Bend; Regional Coast Guard	Long-term
2.3: Identify funding opportunities with state legislature related to emergency management and preparedness	Port of Coos Bay	Mid-term
2.4: Analyze potential economic and social impact of sea level rise and develop contingency plans for highly impacted areas	Port of Coos Bay; Potential Appropriate Advisory Committee	Long-term

Source: Points Consulting, Port Staff, & Port Commission, 2025

Regional Coordination and Communication Goals

The SBP regional coordination and communication goals may include the promotion or communication of the Port's SBP in general, particularly related to its Strategic Direction & Action Plan and Capital Improvements Plan. Promoting its public transparency and improving communication with other regional governments should be included for the Port moving forward. Table 2.5 below reports the full Goals & Objectives for regional coordination and communication.

Goal 1: Continue growth of public transparency and communicate new opportunities to the community

In conjunction with Objective 1.1 in Management Goal 1, the Port should openly advertise its new advisory committees. In addition to gaining public interest, it also shows the Port is making an effort to improve public transparency.

Goal 2: Improve communication and coordination with regional and Tribal governments

Ensuring collaboration with regional governments can benefit the Port and the community in many ways. The Port would benefit by gaining new partners for future projects and the community would then benefit from those projects. Offering the presence of Port staff and making an effort to present regular updates is the first step in creating stronger partnerships.

Table 2.5: Regional Coordination and Communication Goals & Objectives

Objective	Actors	Timeframe
Goal 1: Continue growth of public transparency and communicate new opportunities to the community		
1.1: Advertise positions for new advisory committees	Port of Coos Bay	Short-term
1.2: Host quarterly open house meetings with staff and commissioners	Port of Coos Bay	Mid-term
1.3: Work with commercial realtor to advertise vacancies at Port properties for lease	Port of Coos Bay	Mid-term

1.4: Adopt a default position of sharing as much information as possible	Port of Coos Bay	Short-term
Goal 2: Improve communication and coordination with regional and Tribal governments		
2.1: Provide quarterly updates on Port financials and activities at City Council meetings (Coos Bay and North Bend), County Commissioners meetings, and Tribal Council meetings	Port of Coos Bay; regional governments	Mid-term
2.2: Offer presence of Port Commissioners or staff at public meetings of CTCLUSI and the Coquille Indian Tribe	Port of Coos Bay	Short-term
2.3: Increase collaboration and partnership with Southwestern Oregon Community College (SWOCC) for regional workforce development initiatives	Port of Coos Bay; SWOCC	Mid-term
2.4: Schedule or coordinate meetings for discussions of regional needs and collaboration opportunities with other local port districts	Port of Coos Bay; Port of Bandon; Port of Umpqua	Long-term

Source: Points Consulting, Port Staff, & Port Commission, 2025

Pacific Coast Intermodal Port Goals

While the PCIP is not necessarily an avenue of Port operations, the project is large enough that it requires some designated goals (more info here). More specifically, there has been a noted information gap between the Port, its private partner, and the community on the project, and an effort should be made to close the gap. Additionally, the Port should do further research on how else to benefit from the federal and state funding for the project. Table 2.6 reports the full Goals & Objectives for the Port related to the PCIP.

Goal 1: Shed light on remaining timeline and plan for the PCIP

Even though the full cost and potential benefits have not yet been released, the timeline for when such information will be ready or available should be clarified. Key studies (e.g. the official economic impact assessment) should also be published when completed. It should also be understood that timelines can change due to conditions outside of the Port's control as the PCIP is a public-private partnership. But the Port should make an effort to keep the public in the loop as these inevitabilities arise to ensure transparency.

Goal 2: Capitalize on federal and state funding efforts for regional economic development

Due to the large amount of public dollars that have been committed to the PCIP, the Port now bears some responsibility to see the project through to the best of its ability. If the project is successful, it could catalyze further investment in the region and spark

revitalization and new employment opportunities. In the meantime, the Port should also look towards how else it can benefit from the ongoing project work.

Table 2.6: PCIP Goals & Objectives

Objective	Actors	Timeframe
Goal 1: Shed light on remaining timeline and plan for the PCIP		
1.1: Clarify remaining capital requirements and differentiate between public and private responsibilities	Port of Coos Bay; Northpoint Development	Short-term
1.2: Identify potential funding sources for remaining capital requirements and whether they are public or private sources	Port of Coos Bay; Northpoint Development	Short-term
1.3: Clarify economic impact of the PCIP and provide published estimates to the community	Port of Coos Bay	Short-term
Goal 2: Capitalize on federal and state funding efforts for regional economic development		
2.1: Activate the PCIP project	Port of Coos Bay; Northpoint Development	Long-term
2.2: Develop process and policies related to notification and contract awards to ensure highest opportunity for capture of economic impact within Coos County	Port of Coos Bay; Coos County	Mid-term
2.3: Research spinoff industries for the PCIP, including complementary and alternative uses for North Spit properties or adjusting staff focus	Port of Coos Bay; SCDC; CCD; Business Oregon	Short-term

Source: Points Consulting, Port Staff, & Port Commission, 2025

3. Capital Improvements Plan

According to the 2010 Statewide Port Strategic Business Plan and Statewide Port planning guidance, the Capital Improvements Plan is meant to be the first five to six years of the longer-term Capital Facilities Plan (10-20 years long). In Objective 1.1 of Financial Goal 1, we recommend that the Port complete a full Capital Facilities Plan in addition to our Capital Improvements plan.

Our team has developed this plan to align with the Property Goals & Objectives and responses from the Port Commission on the Asset Planning Worksheet (completed September 2025). This plan should be reviewed annually as part of the Port's regular budget process. Table 3.1 through Table 3.5 report the suggested capital improvements by the Port Commission on Port assets by asset group (Charleston, Railroad, North Spit, Upper & East Bay).

Table 3.1: Charleston Capital Improvements

Asset	Current Suggested Action by Commission	Priority	Rationale
Docks at the marina	Maintain OR Upgrade/Improve	High	The Charleston Marina is an essential piece of the regional economy, supporting the local maritime industry. The Port has a responsibility to ensure the function of the Marina, and the current docks are in need of repairs.
Commercial/ retail storefront at the marina	Maintain OR Upgrade/Improve	Mid	There are currently several buildings in the commercial/retail storefront at the Charleston Marina that are vacant and unused. With the traffic of maritime workers, improved buildings with business tenants could perform well. Charleston also offers recreational opportunities for families and visitors. The Marina could benefit from maintenance or improvements here.
RV Park at the marina	Maintain OR Upgrade/Improve	Low	The RV Park presents the opportunity to capitalize on tourism and outdoor recreation opportunities in Charleston and the Coos County region. Improvements could make the property more attractive to visitors and would thus produce revenue for the Port. However, the RV park is fully functional as it currently stands.

Shipyard commercial/ fabrication	Upgrade/Improve	High	The single most requested improvement to the Shipyard is a full replacement of the Marine Ways to pull and push ships. A new Marine Ways would allow the Shipyard operators to produce and work on larger ships, potentially expanding their market share. A June 2025 quote for this replacement amounted to approximately $3 million or more.
Shipyard docks	Upgrade/Improve	Mid	The work docks are similarly in need of repairs. Some portions of the Shipyard work docks present physical hazard as well. Replacement or improvements would allow Shipyard operators to expand their capacity. A quote in the recent past for the Port estimated a cost of $2.5 million for the improvement.
Shipyard storage	Maintain OR Repurpose	Mid	At the time of our assessment, the Port indicated there are between 25 to 30 derelict vessels in the storage area of the Shipyard. Removal and dismantlement of these ships could cost between $125,000 to $300,000. Removal and dismantlement would allow much of this land to be repurposed.
Vacant properties	Divest	Low	The Port currently owns two fully vacant properties in Charleston. The properties are located away from the Marina in Coos County commercial zoning. Divesting of these properties to a private actor could bring development and contribute to revitalization.

Source: Points Consulting, Port Staff, & Port Commission, 2025

Table 3.2: Railroad Capital Improvements

Asset	Current Suggested Action by Commission	Priority	Rationale
Coos Bay Rail Line	Upgrade/Improve	High	The CBRL is of paramount importance to the PCIP. For this key reason, the railroad should be improved to facilitate development and economic benefits that follow. As of 2025, over $1 billion is expected to be needed to rehabilitate and improve the CBRL.
Rail Yard	Divest	Low	The Port's current rail yard is located in the East Bay area and is south of the Swing Bridge. Because the Swing Bridge is out of commission (which is likely to continue in the long term), the Port needs a new rail yard north of the Swing Bridge. The current rail yard property could be sold or leased to a private actor and put to more efficient use for the community.

Source: Points Consulting, Port Staff, & Port Commission, 2025

Table 3.3: North Spit Capital Improvements

Asset	Current Suggested Action by Commission	Priority	Rationale
Pacific Coast Intermodal Port Project	Continue as is	High	Tens to hundreds of millions of State and Federal dollars have been committed to this project thus far. Additionally, the project does have the potential to produce further economic development through indirect and induced impacts. The Port should see this project through.
Effluent Outfall/Lake Property	Maintain OR Continue as is	Low	This property on the North Spit hosts a wastewater pond from previous ownership. The Port does not currently have responsibilities for maintenance, and cost estimates for maintenance have not been produced. Further research and discussions will be needed and continuing as is seems the best action at this point.

Overlook Property	Divest	Low	The Overlook Property is located on the North Spit, west of Roseburg Forest Products. The Property has several trails and outdoor recreation opportunities that have not been maintained in years. Located in industrial zoning, the property could be sold to a private actor to spin off of the PCIP.

Source: Points Consulting, Port Staff, & Port Commission, 2025

Table 3.4: Upper & East Bay Capital Improvements

Asset	Current Suggested Action by Commission	Priority	Rationale
Tyree Oil Property	Divest	Low	Tyree Oil current leases their property from the Port in the Upper Bay area. The Port could benefit from cash flow produced by fully selling the property to Tyree Oil, who may prefer to own the property for long-term stability.
Downtown Hub Building	Maintain OR Continue as is	Mid	The Hub Building acts as the Port's current headquarters. However, there is maintenance work that is needed. For the '25/'26 budget year, the Port budgeted $10,000 for HVAC repairs and $15,000 for roof repairs. Continuing with this maintenance work ensures continued use and stability for future tenants. The Port currently benefits from owning the building as opposed to renting its space, so at least the Port ought to continue as is.
Terminal One	Divest	High	Terminal One is in a prime location for light industrial activity. The property is the location of the previous Georgia Pacific wood chip mill. The Port could divest of the property to reduce its large inventory, reduce its risk for future mitigation activity, and put the property in the hands of a private actor to ensure it is put to use for economic development.

Eastside Residential	Divest	Mid	The Port's Eastside Residential property is approximately 130 acres in total, though some are likely to be restricted by wetlands. The property has potential to address some local housing shortages while providing outdoor recreation opportunities for future residents. The Port does not have the staff capacity to manage development of the property, and divesting would provide cash flow and see the property put to residential use, rather than potential.
Eastside Industrial	Divest	Low	The Eastside Industrial property is around 190 acres but is also partially restricted by wetlands. Selling the property to a private actor could see the property developed and produce jobs for the community. Additionally, the Port would benefit from reducing its inventory to refocus its limited staff capacity.

Source: Points Consulting, Port Staff, & Port Commission, 2025

There were a handful of Port assets in which the Port Commission was not largely in consensus on. Those assets are reported in Table 8.5. Further deliberations will be required to identify which action should be taken with each asset below.

Table 3.5: Port Assets Requiring Further Deliberation

Property Group	Asset	Priority
Charleston	Ice Plant	Mid
Railroad	Swing Bridge	Mid
Railroad	South Line to Coquille	Mid
North Spit	Henderson Site	Low
North Spit	DB Western Property & T Dock	Mid
Upper & East Bay	Oyster Leases/Tide Flats	Low
Upper & East Bay	Dredge Spoils/Islands	Low

Source: Points Consulting, Port Staff, & Port Commission, 2025

4. Port Overview

The facilities, resources, and policies of the Port of Coos Bay are integral to its operations. This section describes the Port's main facilities and assets. We include their locations, access points, and the policies that govern their use. Financial and market conditions also heavily influence when and how the Port makes strategic decisions for the good of the region, and these factors will be discussed as well.

Port Location and Access

Coos Bay harbor is a major deep-draft coastal harbor, with hundreds of millions of dollars in imports and exports crossing the bar annually. This makes it one of the busiest seaports in Oregon. Experienced recreational and commercial maritime workers, a safe entrance bar, and a short 15-mile navigation channel ensure that inbound and outbound cargo moves efficiently through local terminals.

Just off U.S. Highway 101, Trans Pacific Parkway provides access to the Port's facilities and land on the North Spit of Lower Coos Bay. This is where most of the Port's property by acreage is located. These North Spit properties are also served by the Coos Bay Rail Line (CBRL), which interchanges with the Union Pacific Railroad in Eugene, Oregon, making it a strong asset for regional operators to ship goods to and from Oregon's bay area.

South of the North Spit, just across the channel from the North Jetty, lie the Charleston Marina and the Port's Shipyard. Access to these facilities is principally via Oregon Route 540, a state highway running from North Bend to Cape Arago State Park. From the north, visitors and users can reach Oregon Route 540 by traveling south on U.S. Highway 101, crossing McCullough Memorial Bridge, and transitioning to Cape Arago Highway/Route 540 in the City of North Bend.

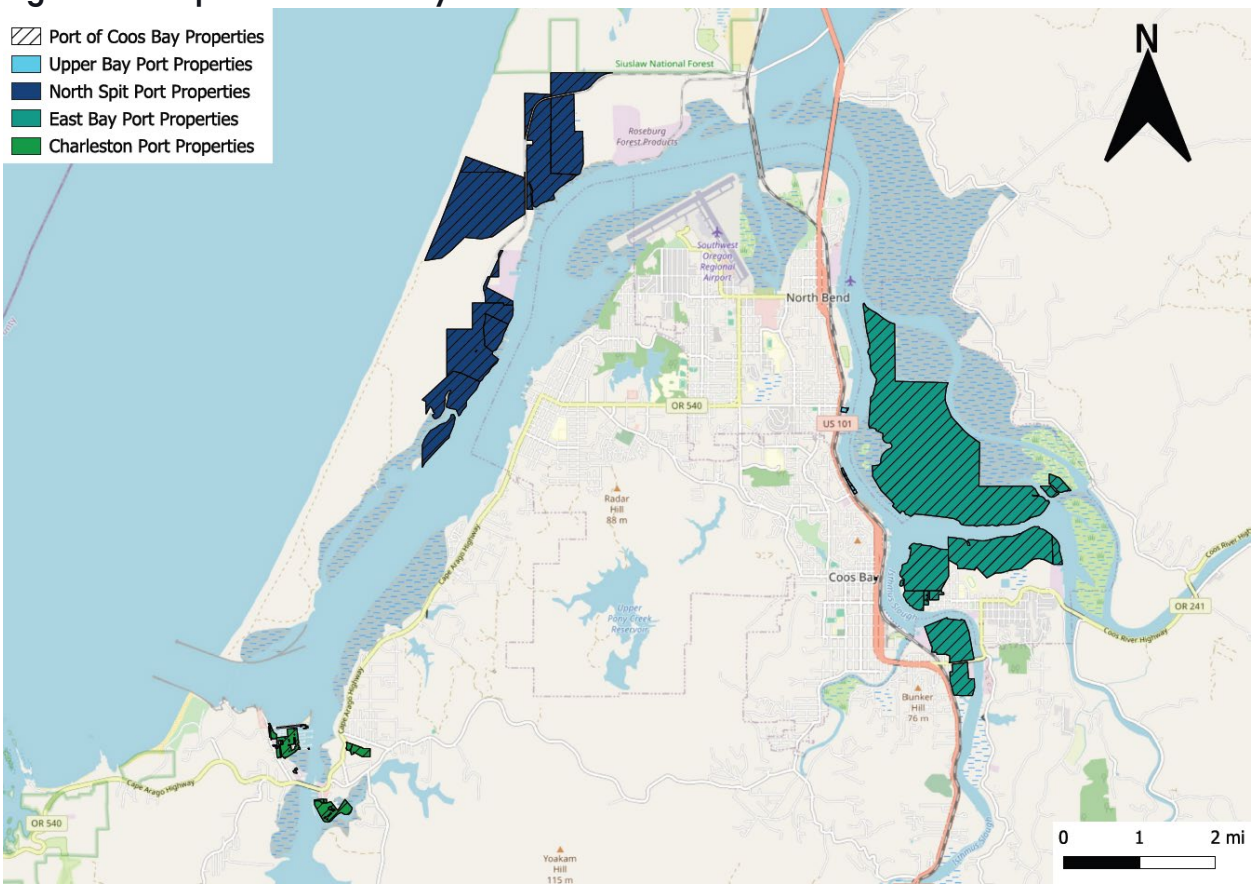
The Port's Upper Bay properties, including the Hub Building, which hosts the Port offices, are accessible via U.S. Highway 101, traveling south from North Bend to the City of Coos Bay. At the interchange of U.S. Highway 101 and Oregon Route 241, Mullen Road provides access to the Port's Terminal One property (the site of potential industrial redevelopment). Oregon Route 241 also serves as the main access route to the Port's vacant residential and industrial properties in Eastside.

Port Facilities

The Port of Coos Bay's asset inventory is substantial, totaling just over 2,500 acres in Coos Bay. About 925 acres consist of rights to areas in the slough for dredge material disposal. In addition to its main offices in the City of Coos Bay, the Port owns property in the unincorporated community of Charleston, residential and industrial properties in

Eastside, and approximately 1,000 acres of land on the North Spit (Figure 4.1). The Port also owns and operates the Coos Bay Rail Line, which stretches from Coquille to Eugene.

Figure 4.1: Map of Full Inventory of Port Facilities and Assets

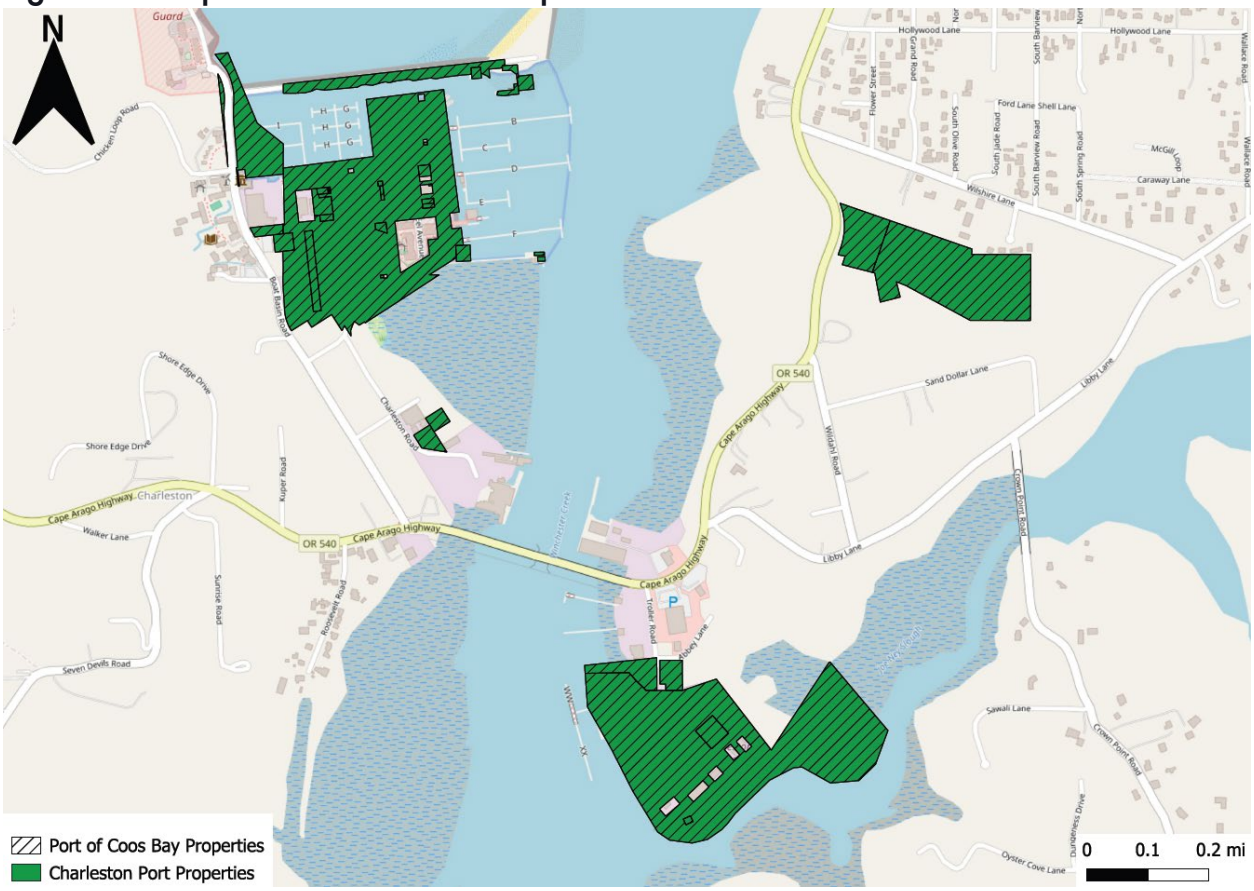


Source: Coos County GIS Data, Port of Coos Bay, 2015 Strategic Business Plan

Charleston

Although the Charleston area accounts for the smallest share by acreage of Port land among the four main asset categories, it plays an important role in supporting the commercial fishing and maritime industry on the Oregon Coast. The Port's Charleston Marina Complex and Shipyard (shown on the southernmost side of Figure 4.2) are both located here. Table 4.1 lists each parcel in the Port's Charleston inventory, along with a description of its current use.

Figure 4.2: Map of Charleston Port Properties



Source: Coos County GIS Data, Port of Coos Bay, 2015 Strategic Business Plan

Table 4.1: Charleston Port Properties by Parcel

Tax Lot Number	Acres	Property Description
26S14W02AC-323Z1	<0.1	Commercial Buildings
26S14W02AC-308Z1	<0.1	Marina and RV Park
26S14W02AC-301Z1	<0.1	Commercial Buildings
26S14W02AC-327Z1	<0.1	Commercial Buildings
26S14W02AC-310Z1	<0.1	Commercial Buildings
26S14W02AC-205Z	<0.1	Ice Plant and Public Buying Dock
26S14W02AC-204Z	<0.1	Ice Plant and Public Buying Dock
26S14W02AC-307Z1	<0.1	Commercial Buildings
26S14W02AC-320Z	<0.1	Commercial Buildings
26S14W12BB-608Z1	0.1	Boatyard, Docks
26S14W02AC-306Z1	0.1	Commercial Buildings
26S14W02AC-314Z1	0.1	Commercial Buildings
26S14W02AC-203Z	0.1	Commercial Buildings
26S14W02AC-321Z1	0.1	Commercial Buildings
26S14W02AC-309Z2	0.1	Commercial Buildings

26S14W02AC-103Z	0.1	Breakwater
26S14W02AC-302Z	0.1	Commercial Buildings
26S14W02AC-101Z1	0.2	Breakwater
26S14W02AC-102Z1	0.2	Breakwater
26S14W02DB-800	0.3	Vacant Property
26S14W02BD-201Z1	0.3	Commercial Buildings
26S14W02AC-315Z1	0.4	Commercial Buildings
26S14W02DB-700	0.4	Vacant Property
26S14W12BB-603Z1	0.5	Boatyard, Docks
26S14W02AC-317Z1	0.6	Marina Storage Units
26S14W12BB-300	0.6	Storage Yards
26S14W12BB-500	0.9	Storage Yards
26S14W01BC-5600	2.6	Barview Upland Dredge Material Disposal Site
26S14W02BD-200	2.7	Marina and RV Park
26S14W01CA-400	8.7	Barview Upland Dredge Material Disposal Site
26S14W02AC-300	23.8	Marina and RV Park
26S14W12BB-600	25.0	Shipyard, Docks
Acreage Total	**67.9**	**-**

Source: Coos County GIS Data, Port of Coos Bay, 2015 Strategic Business Plan

Marina Complex

The marina complex consists of three main parts:

- Docks
- RV park
- Commercial buildings



The B, C, D, E, F, G, H, and I docks are mooring docks, where local and commercial fishermen pay Port-established rates to dock their vessels. Just south of these docks is the Port-owned and operated ice plant, where commercial fishermen purchase ice at Port-set rates to keep their catch fresh before returning to the docks for flash-freezing. Fishermen from across the Oregon Coast purchase ice here, as the Port's rates are often more competitive than those of private ice plants at other marinas.

The Port's Marina RV Park, located west of docks B–F and south of docks G–I, includes about 75 RV sites and a community center used by locals for events. Storage units for rent are also located west of the main grounds.

Adjacent to docks B–F are several commercial lots. Recent tenants have included a restaurant and a small bait and tackle shop, though vacancies are common. These buildings are currently in disrepair and in need of rehabilitation or redevelopment. This commercial area not only provides rental revenue for the Port but also serves residents and workers in Charleston. With investment in improvements and redevelopment, the docks, RV park, and commercial buildings offer significant opportunities for the Port.

Shipyard

The Charleston Shipyard serves three main purposes:

- Vessel storage,
- Vessel dismantling
- Vessel repair & fabrication.





As stewards of Coos Bay harbor, the Port is responsible for hauling away vessels abandoned in the bay or at Marina docks. These vessels are transferred to the Shipyard for storage and eventual dismantling. However, if ships contain lead paint or other toxic materials, the Port must complete an environmental review before dismantlement, creating delays and resulting in many abandoned vessels being stored on-site. Short- and long-term work areas, along with work docks, are available for use by private vessels as well.

An adjacent point to the Marina and the shipyard is the State Dredge. The Port operates the dredge for other ports; during peak season, Charleston Marina

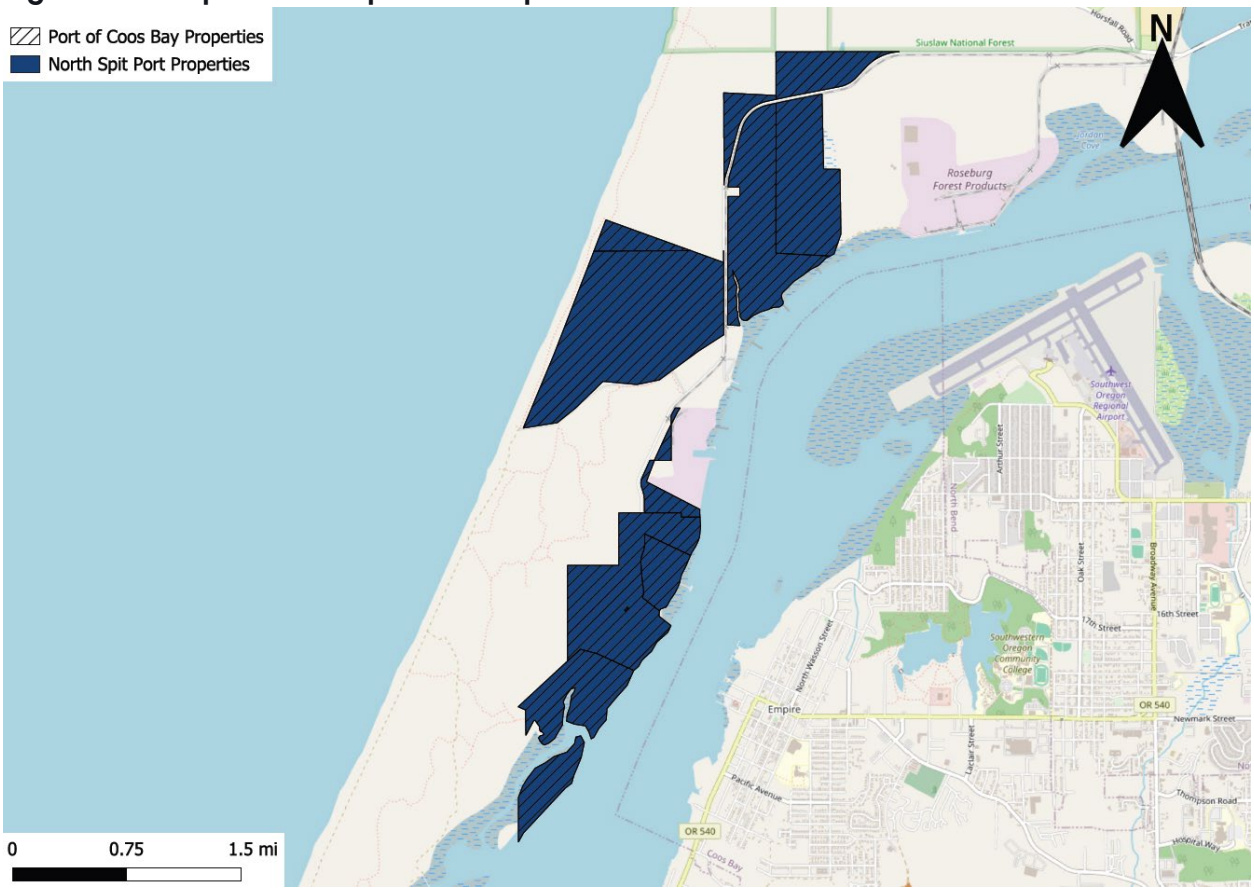
staff leave their posts to operate it. This requires the Port to hire temporary workers to maintain Marina operations (a recurring point of contention).

Possibly the most critical function of the Shipyard is repair and fabrication. Several buildings in the Shipyard are leased to private operators who provide repair services for commercial fishermen and other maritime users, as well as fabricate vessels for a variety of maritime purposes.

North Spit

Discounting the East Bay parcel used for dredge material deposition, the North Spit contains the bulk of the Port's property in terms of acreage (Figure 4.3). Covering just over 1,000 acres, most of the North Spit property is vacant, with the exception of the D.B. Western lease. Table 4.2 reports each Port property on the North Spit by tax lot number and acreage, along with property descriptions. Additionally, the southernmost Port-owned parcels on the North Spit (across the bay from Empire) are the proposed site of the Pacific Coast Intermodal Port Project (PCIP).

Figure 4.3: Map of North Spit Port Properties



Source: Coos County GIS Data, Port of Coos Bay, 2015 Strategic Business Plan

Table 4.2: North Spit Port Properties by Parcel

Tax Lot Number	Acres	Property Description
25S13W07-102	0.8	Vacant
25S13W07-107	3.9	Vacant
25S13W18-202	17.3	Vacant Land
25S13W06-101	22.1	Vacant Land
25S13W18-105Z1	44.6	D.B. Western Lease
25S13W19-200	102.8	In-Water, Mudflats, and Shoreline
25S13W18-100	160.2	Out-of-Service Aquaculture Facility, Sand Dunes, In-Water, Proposed PCIP
25S13W05-300	182.2	Vacant Land
25S13W00-200	191.6	Vacant Land
25S13W07-101	298.0	Vacant Land
Acreage Total	**1,023.7**	**-**

Source: Coos County GIS Data, Port of Coos Bay, 2015 Strategic Business Plan

Pacific Coast Intermodal Port Project



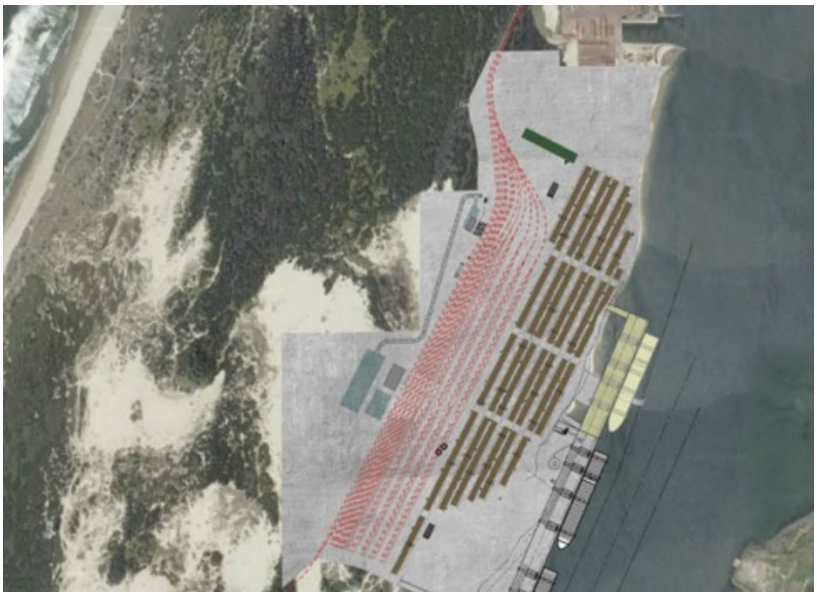
Around three and a half years ago, the Port Commission made the decision to pursue an intermodal port-to-rail terminal. In May 2022, that decision was formalized when the Port entered into a public-private partnership (PPP) lease agreement with NorthPoint Development. [2] The project was initiated as part of the Port's responsibility to serve as a driver of regional economic development, with the goal of attracting hundreds of millions of dollars in investment and creating family-wage jobs for the local economy.

The port terminal is designed to be fully electric, moving cargo containers directly from container ships onto the Port's Coos Bay Rail Line. Once transitioned to rail cars, the cargo would travel north to the line's connection with the Union Pacific Railroad in Eugene. By being fully electric and shifting freight from trucks to rail, the project is

[2] "Port of Coos Bay Announces Lease Execution with NorthPoint Development for the Future Pacific Coast Intermodal Port (PCIP), Oregon International Port of Coos Bay, May 24, 2022, https://www.portofcoosbay.com/port-of-coos-bay-announces-lease-execution-with-northpoint-development-for-the-future-pacific-coast-intermodal-port-pcip.

intended not only to support economic development but also to reduce carbon emissions.

More recently, the Port has begun to see major investments from state and federal partners take shape. In October 2024, the Port secured $25 million in INFRA grant funding for the project. This was its first major grant success.[3] Later that same month, the Port announced an additional $29 million in federal CRISI funding, a critical step toward making necessary infrastructure upgrades to the CBRL for the PCIP project.[4] The next significant milestone came when the Oregon State Legislature approved $100 million in bond funding for the PCIP.[5] Needless to say, the Port has secured substantial support for this project so far.



Source: https://www.dredgingtoday.com/2023/08/28/dredging-part-of-the-pacific-coast-intermodal-port-project.

As for bringing the project to fruition, the PCIP still has a long way to go. The total cost is currently estimated at around $2.3 billion. This covers planning, design, and construction.[6] In addition, a rigorous review and permitting process will be required, involving both federal and state agencies. Within the next two years from the time of our assessment, the project is expected to enter the National Environmental Policy Act (NEPA) review process. Following the NEPA review and accompanying public engagement,

[3] "Port of Coos Bay Secures $25 million INFRA Grant for Pacific Coast Intermodal Port Project," Oregon International Port of Coos Bay, October 17, 2024, https://www.portofcoosbay.com/port-of-coos-bay-secures-25-million-infra-grant-for-pacific-coast-intermodal-port-project.
[4] "Building the Future of Freight: $29M Federal CRISI Grant Invests in Port of Coos Bay," Oregon International Port of Coos Bay, October 28, 2024, https://www.portofcoosbay.com/building-the-future-of-freight-29m-federal-crisi-grant-invests-in-port-of-coos-bay.
[5] "Oregon Legislature Approves $100 Million in Bonding Support for Pacific Coast Intermodal Port Project," Oregon International Port of Coos Bay, June 30, 2025, https://www.portofcoosbay.com/oregon-legislature-approves-100-million-in-bonding-support-for-pacific-coast-intermodal-port-project.
[6] "About the Pacific Coast Intermodal Port," Pacific Coast Intermodal Port, accessed August 13, 2025, https://pcipproject.com/about-pcip.

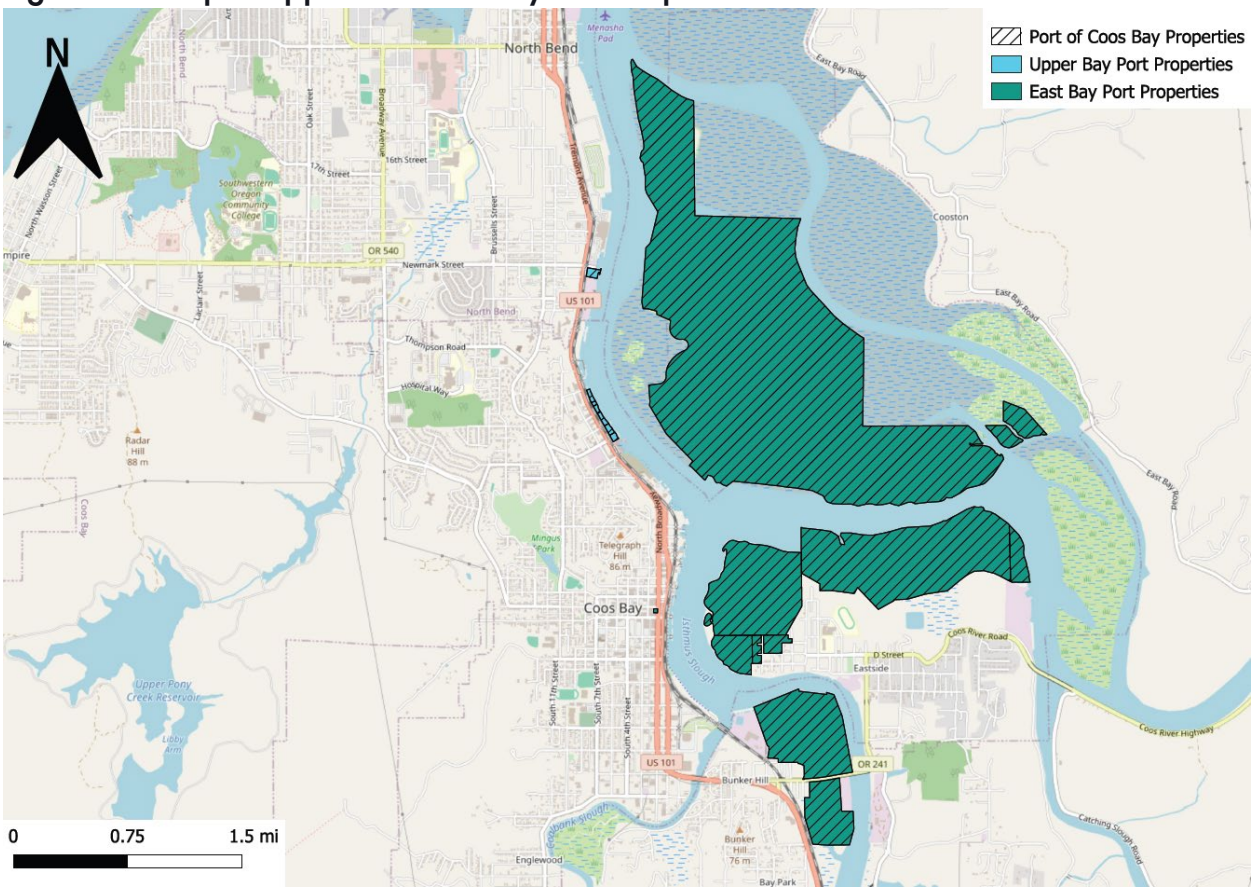
construction is projected to begin in roughly three years. With agencies such as the U.S. Army Corps of Engineers (USACE) and U.S. Environmental Protection Agency (EPA) involved, the project still faces a number of significant hurdles.

Upper & East Bay

The Port owns several small properties in the Upper Bay area, including the Tyree Oil property, Orcas Dock, and Dolphin Terminals along U.S. Highway 101 (Figure 4.4). In the East Bay area, the Port's holdings include substantial vacant residential and industrial land, representing significant opportunities for future development. Table 4.3 and Table 4.4 list the respective properties owned by the Port in the Upper and East Bay areas, which together total about 480 acres (excluding the dredge deposit site).



Figure 4.4: Map of Upper and East Bay Port Properties



Source: Coos County GIS Data, Port of Coos Bay, 2015 Strategic Business Plan

Table 4.3: Upper Bay Port Properties by Parcel

Tax Lot Number	Acres	Property Description
25S13W22DD-5201Z1	0.1	Citrus Dock
25S13W22DD-5200	0.5	Citrus Dock
25S13W26BB-101Z1	0.6	Orcas Dock
25S13W22DD-5100	0.6	Citrus Dock
25S13W26BB-100	0.8	Orcas Dock
25S13W22DD-6600	0.8	Dolphin Terminals
25S13W22AD-200	1.6	Tyree Oil
Acreage Total	**5.2**	**-**

Source: Coos County GIS Data, Port of Coos Bay, 2015 Strategic Business Plan

Table 4.4: East Bay Port Properties by Parcel

Tax Lot Number	Acres	Property Description
25S13W26CD-4200	0.2	Hub Building/Port Offices
25S13W35AA-600	2.7	Vacant Land
25S13W35AA-500	5.8	Vacant Land
25S12W30-1000	9.3	Vacant Land

25S13W35AB-100	18.5	Vacant Land and Eastside Boat Launch
25S13W36-1000	39.2	Terminal One
25S13W35-400	94.8	Terminal One
25S13W26D-100	119.0	Vacant Land
25S13W25-100	192.5	Vacant Land
25S13W00-300	923.8	Vacant/Dredge Disposal
Acreage Total	**1,405.7**	**-**

Source: Coos County GIS Data, Port of Coos Bay, 2015 Strategic Business Plan

Terminal One

Terminal One (formerly the Georgia Pacific (GP) wood chip terminal) was once used to load and barge wood chips through the bay to international markets. The site has been vacant for some time, but it remains highly suitable for redevelopment. Covering nearly 135 acres of industrial land already served by water and power, the site presents a strong opportunity to attract an industrial or commercial business that could help expand and diversify the local economy.





Eastside Properties

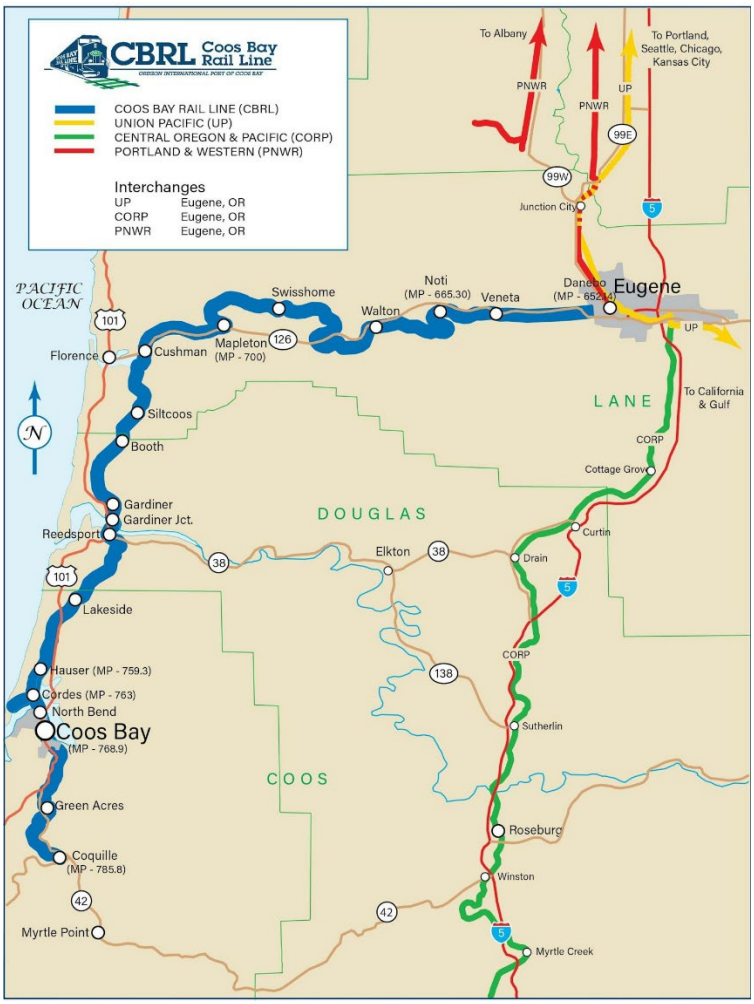
The Eastside properties are located just south of the Port's dredge deposit area in the community of Eastside. One parcel, totaling just over 190 acres, is zoned for industrial use. The Millicoma Marsh Trail also passes through this property. Besides this trail, the property is entirely vacant and would require full site development before it could be utilized. Despite this, the property holds potential to expand the region's economic base.

Additionally, the Port owns two parcels totaling approximately 130 acres within Coos Bay city limits. These properties present opportunities for strategic partnerships, particularly since the City of Coos Bay recently rezoned the land from commercial to residential to support housing development. While site work and planning remain necessary, the

properties have significant potential to accommodate new housing and help address the local housing shortage.

Coos Bay Rail Line

Figure 4.5: Coos Bay Rail Line Map



Source: Portofcoosbay.com/about-the-railroad

In 2009-10, the Port of Coos Bay acquired the CBRL for $16.6 million, using a combination of state loan funds and reallocations from the Coos Bay Rail Bridge repair fund. The Port reopened the line in 2011, and it now transports approximately $460 million worth of freight in and out of the region each year.[7] The CBRL's 134 miles of rail are operated by 20 direct employees and serve 12 customers. Inbound and outbound cargo consists of wood products, fertilizer, and organic dairy feed.

Despite repeated Port successes in securing repair funding, the CBRL remains in need of serious infrastructure upgrades and rehabilitation. The CBRL is critical to the success of the PCIP. If the project gets delayed or fails, contingency planning for this Port asset will be essential. There is also risk that the cost of ongoing repairs and upgrades could outpace the revenue generated from operations. This would place continued strain on Port finances.

Port Policies

Just as it is important to outline the economic opportunities of the Port, it is equally necessary to acknowledge its constraints and responsibilities in business operations. As a taxing district, the Port's obligations and limitations are clearly defined in Oregon

[7] "About the Railroad," Oregon International Port of Coos Bay, accessed August 13, 2025, https://www.portofcoosbay.com/about-the-railroad.

Revised Statutes (ORS) Chapter 777. This chapter provides guidance on the goals and responsibilities of ports across the state.

While not all provisions in ORS 777 are directly relevant to this Strategic Business Plan (SBP), those pertaining to taxation and borrowing authority, allowable activities, and the roles of Port Commissioners are especially worth highlighting. ORS 777 serves as the primary policy document for the Port of Coos Bay in these areas. This summary is not intended to be exhaustive but instead highlights key provisions that directly relate to the Port's current operations and opportunities.

Required and Allowable Port Activities

- The Port may operate and maintain a marina and other recreational facilities, including the management and improvement of bays, rivers, and harbors within its jurisdiction. Facilities constructed in these spaces may be sold or leased to private or public entities.
- The Port may employ staff as it deems necessary and convenient, and it has the authority to determine appropriate compensation for those employees.
- The Port may acquire real and personal property, conditional on receiving an appraisal of fair market value (FMV) from a state-certified appraiser. This includes the ability to purchase property on a "contractual basis" (such as a mortgage), so long as the term does not exceed 20 years.
- The Port has the authority to lease and sell buildings, improvements, personal property and associated lands. Permitted uses specifically outline in statute include "research and development parks" and "sports, recreation, convention, and trade show facilities."

Port Commissioners

- The Port is to be governed by five Commissioners, each serving a four-year term. A Commissioner's seat may be vacated if they fail to attend four or more consecutive Port Commissioner meetings.
- The Commission includes a president, vice president, treasurer, and secretary, who are responsible for filing annual reports to the board, per ORS 777.140 (2).
- Port Commissioners must meet at least once per month, with additional special meetings held as necessary. All materials related to Port business are considered public records, except those discussed in executive session.

Taxation, Bonds, and Borrowing

- Ports may borrow money and issue bonds. With respect to taxes, ports may "assess, levy, and collect taxes" on taxable real and personal property situated within the Port District. Further details on the financial opportunities and constraints of ports are difficult to summarize. For more information, refer to ORS 777.4, included in Appendix A of this plan.

Staff/Professional Development

According to ORS 777, each Oregon port is to be governed by five Port Commissioners. The commissioners have a term of office of four years. The Port Commissioners meet at least monthly and may have additional special meetings. Additionally, the Port Commissioners must have a president, vice president, treasurer, and secretary. All Commissioners for the Port of Coos Bay are listed in this section, along with their positions.

Port Resources & Financial Condition

To assess the Port's resources and their financial condition, our team analyzed the Port's budget and audit reports, along with Coos County assessor data. A detailed inventory of Port assets and facilities is provided above. Detailed tables of historical and current Port budgets are included in Appendix B.

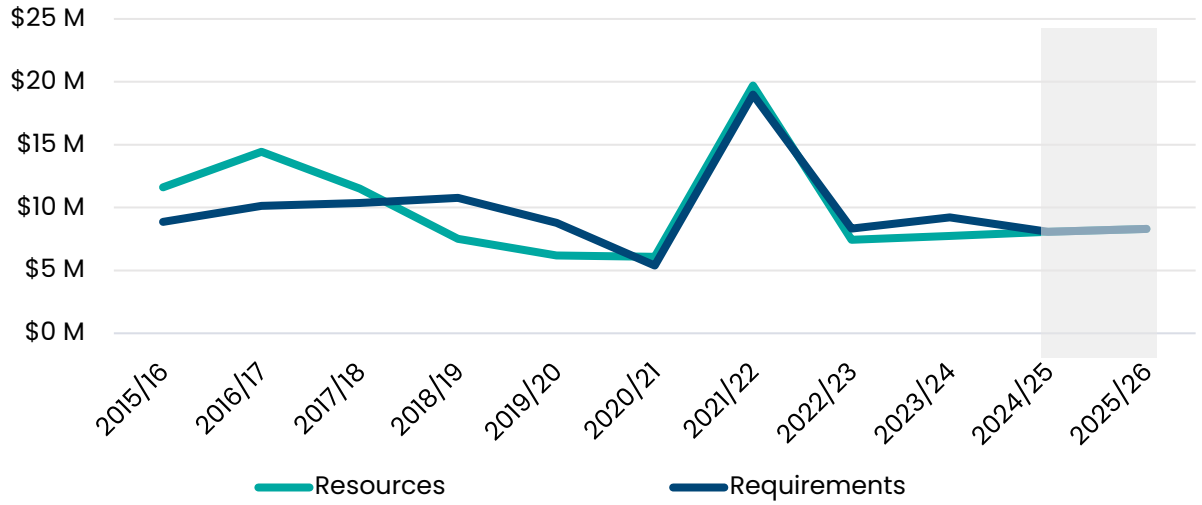
Regarding the Port's financial conditions and resources, our team examined budget reports from the 2015/16 budget year through the 2025/26 budget year.[8] Data from 2015/16 through 2023/24 reflect actual costs and revenues experienced by the Port of Coos Bay, while data for 2024/25 and 2025/26 represent adopted budget estimates, as audit reports for those years have not yet been prepared. In the following charts, the grey bars indicate budgeted estimates rather than actual cost and revenue data.

Figure 4.6 presents the total resources and requirements from the Port's General Fund. Within this fund, revenues are recorded as resources and costs as requirements. Port operations included in the General Fund are Administration, Charleston Operations, CBRL Infrastructure Maintenance and Rehabilitation, Port Operations, Port Development (discontinued as a specified business line after 2021/22), Business Development/External Affairs (discontinued as a specified business line in the 2025/26 budget), and Dredge Operations.

As shown, the Port has remained relatively stable financially, with total requirements exceeding total resources in only four fiscal years: 2018/19, 2019/20, 2022/23, and 2023/24. From 2015/16 through 2023/24, the Port generated a total operating surplus of $1.3 million. The resource surplus for 2024/25 and 2025/26 is $0, as these years represent budgeted estimates rather than actual results.

[8] "Oregon International Port of Coos Bay Budget & Audit Reports," Oregon International Port of Coos Bay, accessed August 25, 2025, https://www.portofcoosbay.com/oregon-international-port-of-coos-bay-budget-audit-reports.

Figure 4.6: Port of Coos Bay General Fund Total Resources and Requirements



Source: Oregon International Port of Coos Bay Budget & Audit Reports

Figure 4.7 presents the total resources and requirements for the Port's Special Projects Fund. This fund records the Port of Coos Bay's largest financial transactions. In cumulative terms, the Port has recorded more than twice the resources and requirements in the Special Projects Fund compared to the General Fund. Resources in this fund (typically large grants and loans) are reserved for specific projects, such as major CBRL maintenance, channel modification, or the PCIP. Since the 2017/18 fiscal year, grants and loans funding these projects have matched the associated costs exactly.

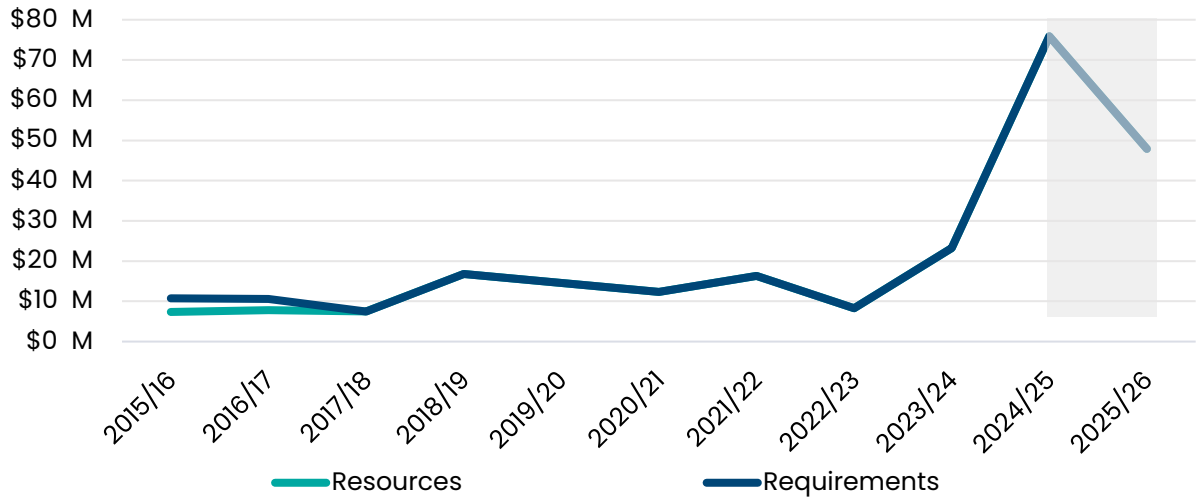
In terms of cost, CBRL projects represent the largest share, with more than $154 million recorded as rail special projects. The next-largest line item is general Port Operations, which reflects larger development projects. Special projects in Charleston have totaled about $13 million over the past eight years, including the two most recent budgeted years.

Although these projects involve significant expenditures, they are fully financed through loans and grants. However, debt service obligations have been substantial. Over the past 10 years, the Port has paid approximately $22 million in principal and interest. Moreover, annual debt service has risen in recent years: from 2015/16 through 2020/21, the Port averaged about $540,000 per year, while from 2022/23 through 2025/26, average annual payments are projected to exceed $1.3 million. This is more than double the previous six-year average.

Beginning in 2023/24, funding through the Special Projects Fund increased nearly tenfold (from around $10 million in prior years to more than $70 million in 2024/25). This surge is due largely to the PCIP, for which the Port signed a lease agreement with its

private partner in 2022/23. In connection with this project, the Port will receive multiple federal grants over the next three years, including the Consolidated Rail Infrastructure and Safety Improvements (CRISI) grant, the Infrastructure for Rebuilding America (INFRA) grant, and the Port Infrastructure Development Program (PIDP) grant. Together, these three grants will total $89 million across the two most recent budget years.

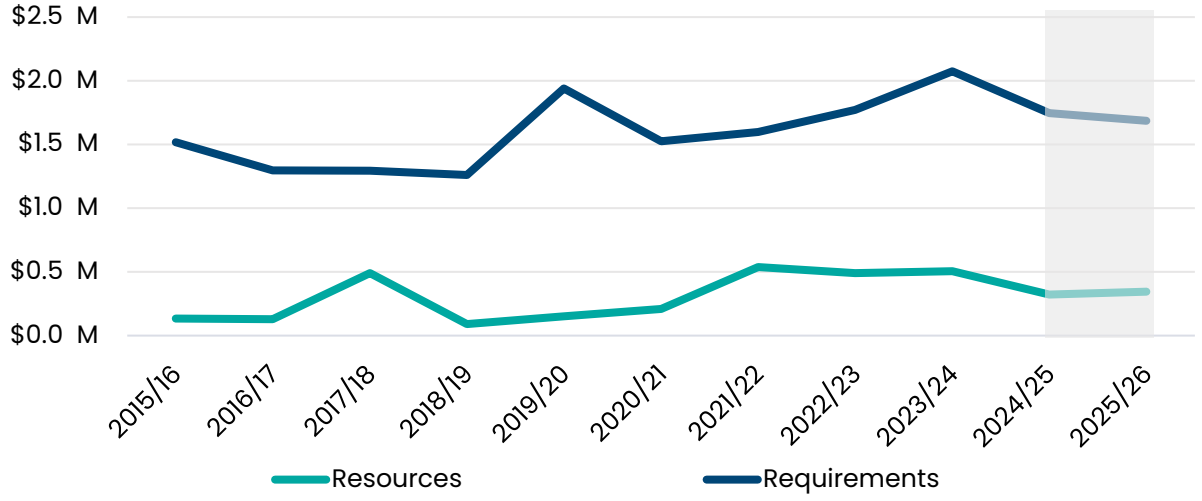
Figure 4.7: Port of Coos Bay Special Project Fund Total Resources and Requirements



Source: Oregon International Port of Coos Bay Budget & Audit Reports

Figure 4.8 presents the total resources and requirements for the Port's administration team. This business line primarily consists of staff salaries and benefits. Administrative activities have contributed to a negative resource surplus of approximately $14.3 million.

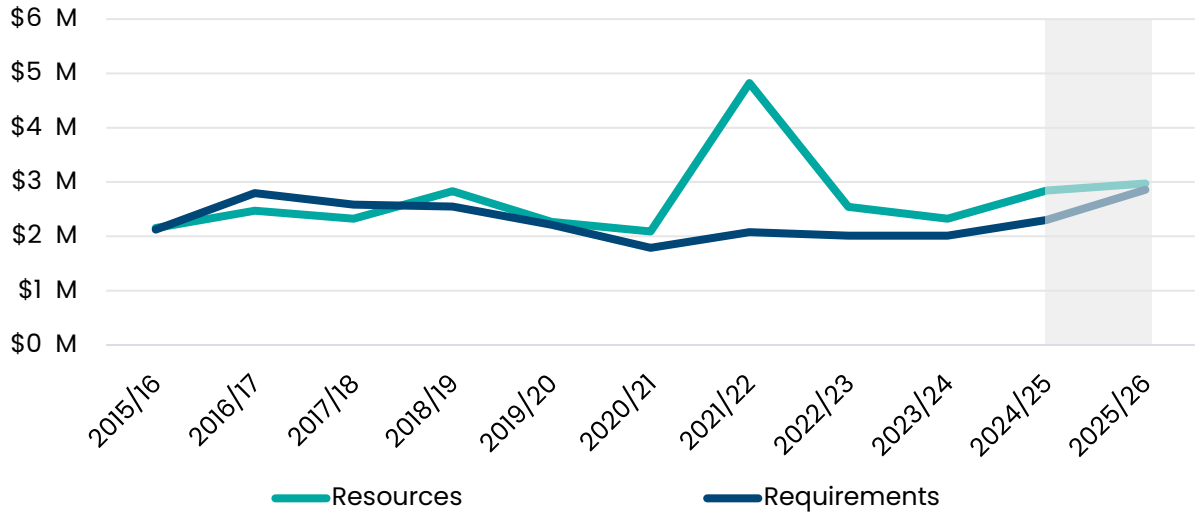
Figure 4.8: Port of Coos Bay Administration Resources and Requirements



Source: Oregon International Port of Coos Bay Budget & Audit Reports

Figure 4.9 displays the Port's resources and requirements for its Charleston operations. Excluding loans and grants for special projects, the Port operates at a surplus in Charleston. In 2021/22, the Port received a $1.6 million loan directly tied to Charleston operations. Even with this loan, several revenue sources (such as building leases, ice sales, propane sales, and moorage) recorded higher gains than in prior years. That same year, the Port also collected a $700,000 insurance claim related to Charleston operations.

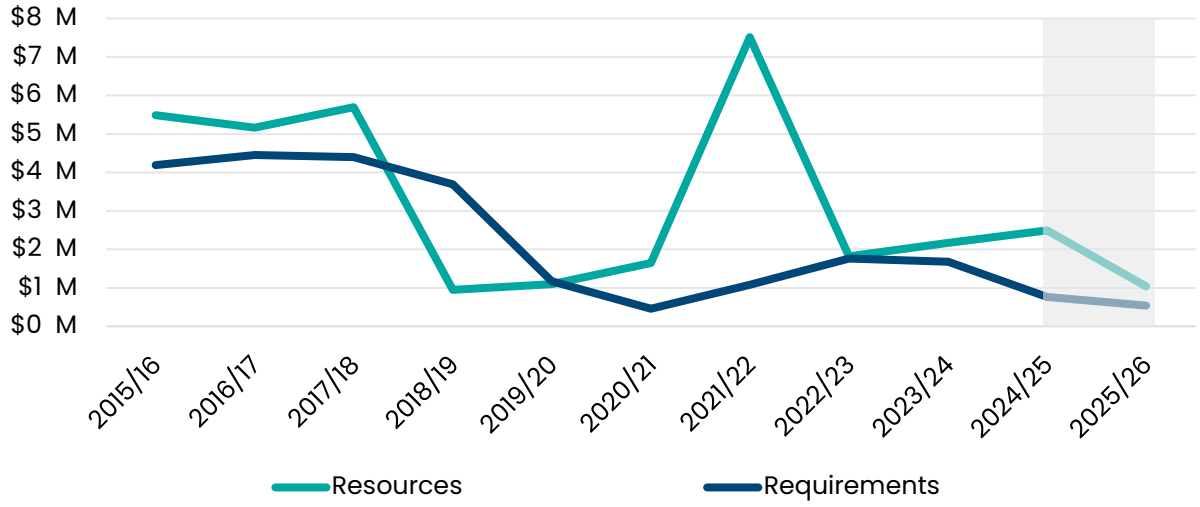
Figure 4.9: Port of Coos Bay Charleston Operations Resources and Requirements



Source: Oregon International Port of Coos Bay Budget & Audit Reports

Figure 4.10 illustrates the resources and requirements associated with the CBRL regarding infrastructure maintenance and rehabilitation. As with Charleston, excluding loans and grants for special rail projects, the Port maintains the CBRL at a net positive, despite requirements exceeding resources in 2018/19 and 2019/20. In 2021/22, the Port received a $5.9 million loan related to CBRL maintenance and rehabilitation. This contributed to a visible increase in resources. For the 2024/25 and 2025/26 budget years, the Port anticipates a positive resource surplus from its CBRL maintenance.

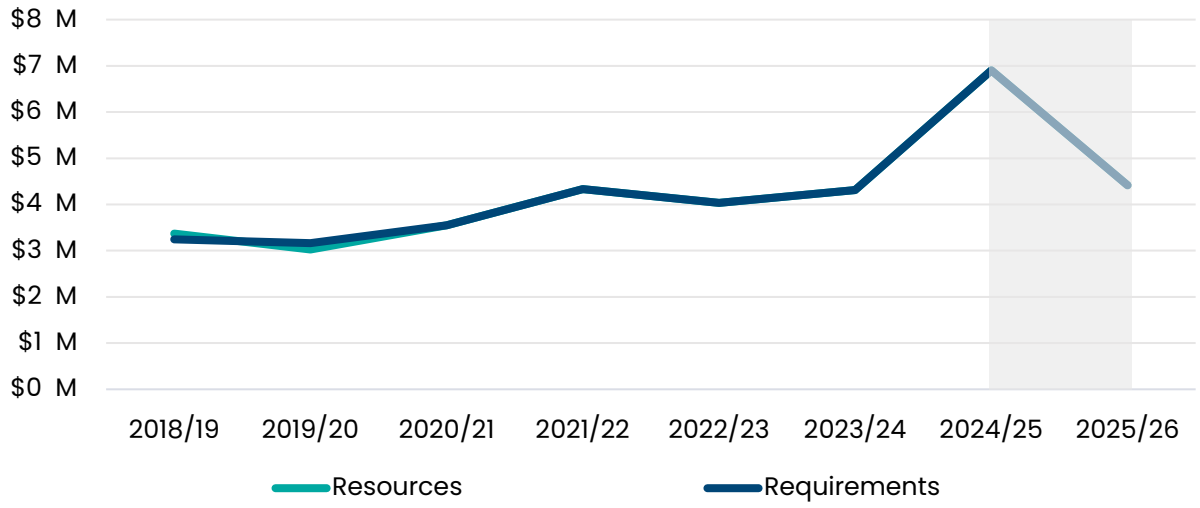
Figure 4.10: Coos Bay Rail Line Infrastructure Resources and Requirements



Source: Oregon International Port of Coos Bay Budget & Audit Reports

Figure 4.11 shows the resources and requirements associated with the operation of the CBRL. The CBRL operations budget is in a separate budget group because the rail line is operated as a separate entity, but still owned by the Port. Budget reports for the CBRL did not include data prior to the 2018/19 budget year. As shown, the rail line has operated at breakeven since the 2020/21 budget year, including the 2024/25 and 2025/26 budget years which are budgeted estimates. In the first two years with actual data reported, CBRL operations had a resource surplus in 2018/19 and a resource shortage of approximately equivalent value in 2019/20.

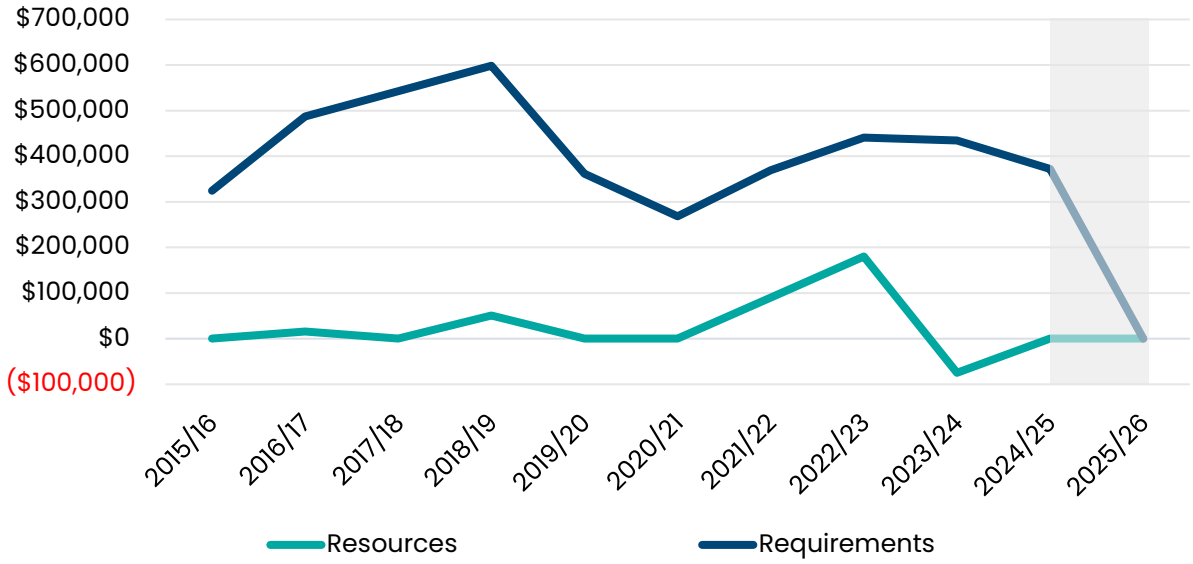
Figure 4.11: Coos Bay Rail Line Operations Resources and Requirements



Source: Coos Bay Rail Line, Inc. Budget & Audit Reports

Figure 4.12 shows the resources and requirements of the Port's Business Development/External Affairs department. Like Administration, this department is dominated by staff costs and does not directly generate revenue. As a result, it has produced a cumulative deficit over the past 10 years. Beginning with the 2025/26 budget, the department is being absorbed into other functions and no longer appears as a separate budget line item.

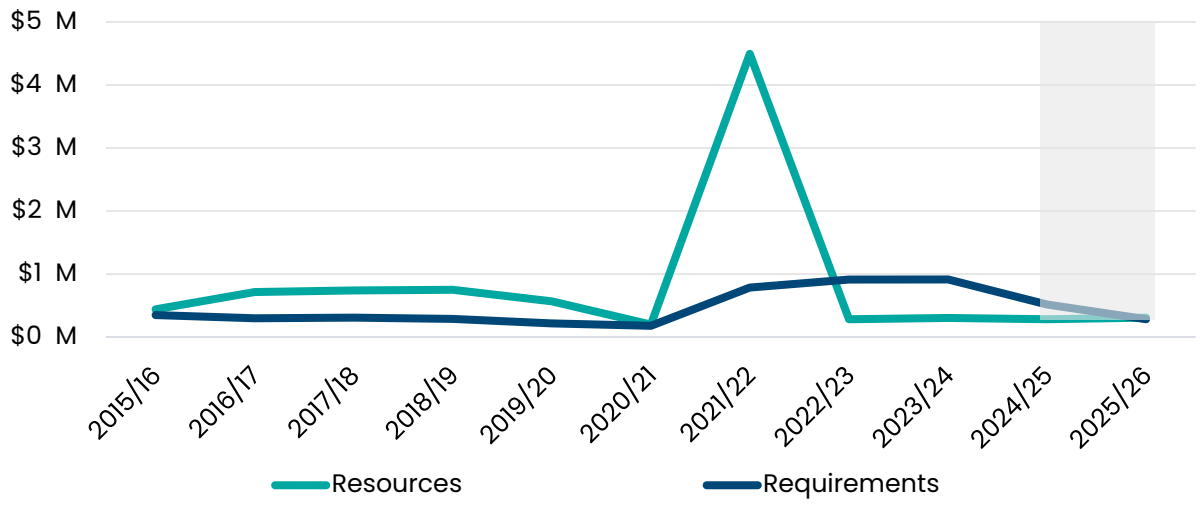
Figure 4.12: Port of Coos Bay Business Development/External Affairs Resources and Requirements



Source: Oregon International Port of Coos Bay Budget & Audit Reports

Figure 4.13 shows the resources and requirements for Port Operations at the Port of Coos Bay. From 2015/16 through 2021/22, resources consistently exceeded requirements. A notable increase occurred in 2021/22, driven by a $4 million grant received that year. However, in 2022/23 and 2023/24, requirements exceeded resources. While the 2024/25 budget projected requirements to exceed resources again, the Port now expects resources to cover requirements in 2025/26.

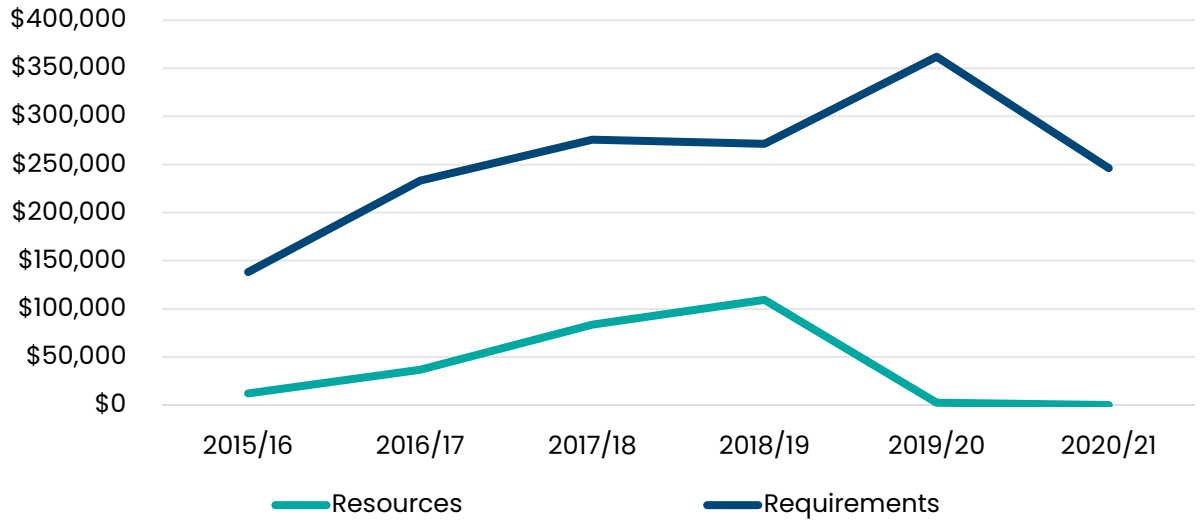
Figure 4.13: Port of Coos Bay Port Operations Resources and Requirements



Source: Oregon International Port of Coos Bay Budget & Audit Reports

Figure 4.14 shows the resources and requirements for the Port's Port Development department. This department is characterized by higher requirements than revenues. Notably, in 2017/18 and 2018/19, all resources for this department consisted of grants. Since the 2021/22 budget, the department has been absorbed into another budget line.

Figure 4.14: Port of Coos Bay Port Development Resources and Requirements

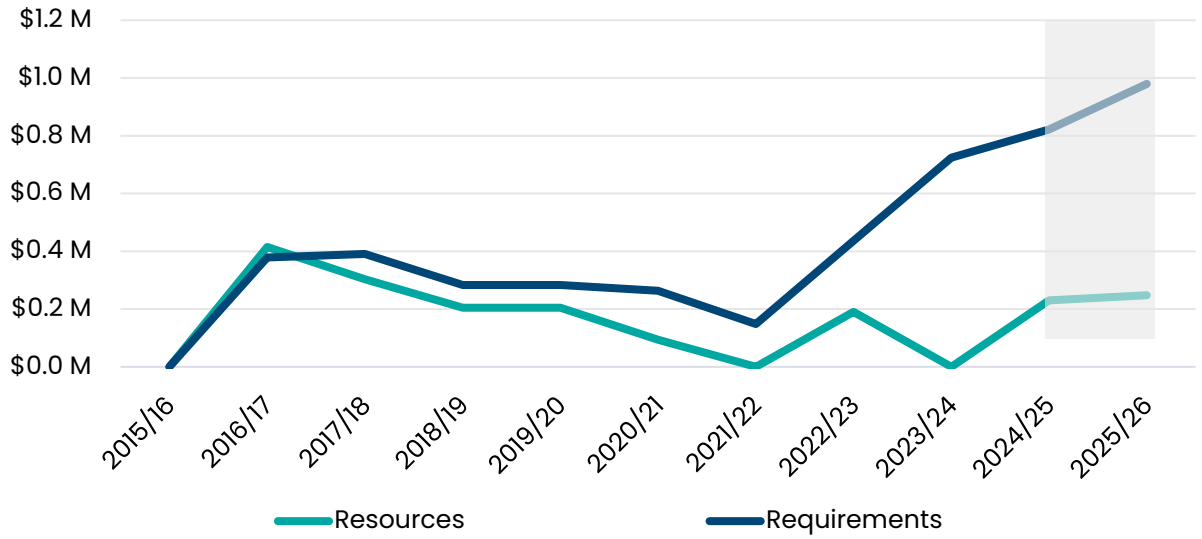


Source: Oregon International Port of Coos Bay Budget & Audit Reports

The Port of Coos Bay operates the Oregon State dredge, which requires dredging not only for its own marina but also for other port districts along the coast. In recent years, this has created staffing challenges. Dredging at other ports often coincides with peak traffic periods at the Port of Coos Bay's Marina Complex.

Beginning in 2017/18, the Port began experiencing higher requirements for operating the state dredge than available resources (Figure 4.15). Since 2022/23, the cost of operating the dredge has been increasing at a faster rate than the resources allocated for it.

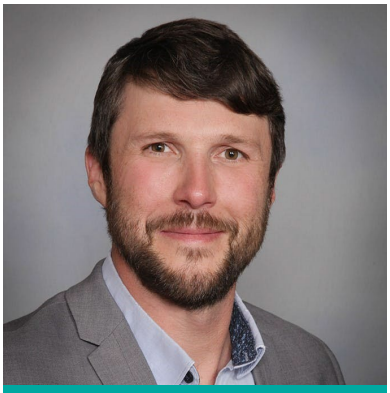
Figure 4.15: Port of Coos Bay Dredging Projects Resources and Requirements



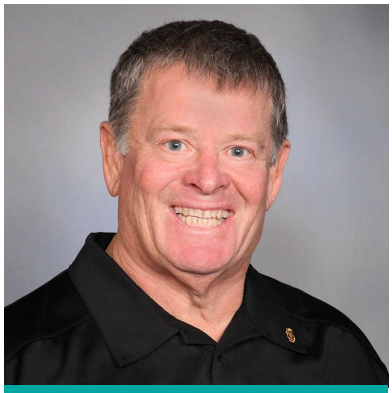
Source: Oregon International Port of Coos Bay Budget & Audit Reports

Port Commission & Leadership

Port Commissioners



Kyle Stevens
– *President*



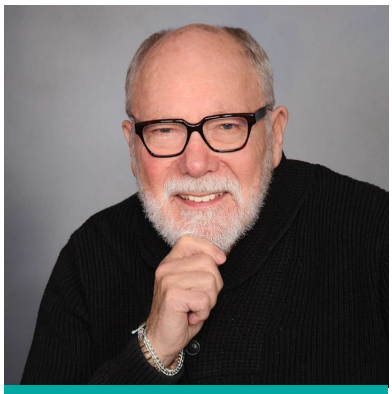
Nick Edwards
– *Vice President*



Kyle ViksneHill
– *Treasurer*

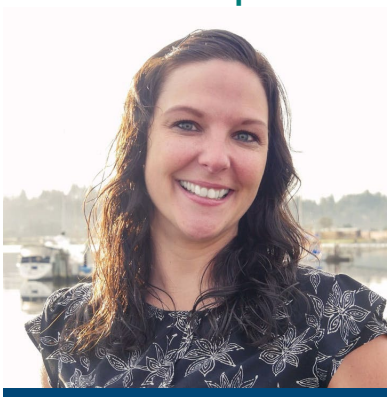


Elise Hamner
– Secretary



Arnie Roblan
– Commissioner

Port Leadership



Lanelle Comstock
– Chief Executive Officer



Brian Early
– CBRL General Manager



Rick Adamek
– Director of Asset Management



Ray Dwire
– Marina Manager



Megan Richardson
– Director of Finance & Accounting



Matt Friesen
– Director of External Affairs

Strategic Partners

The following list reports important regional and local strategic partners for the Port of Coos Bay. Maintaining and strengthening strategic partnerships will be an integral part of the Port's future to ensure community sustainability and economic development. Increased communication and collaboration with these regional actors will only benefit the Coos Bay community.

- Bandon Dunes Foundation
- City of Coos Bay
- City of North Bend
- Coos County
- Douglas County
- Lane County
- CCD Business Development Corporation (CCD)
- South Coast Development Council (SCDC)
- Bay Area Chamber of Commerce
- Southern Oregon Coast Regional Housing
- Coos Bay-North Bend-Charleston Visitor and Convention Bureau (VCB)
- Oregon Department of Fish and Wildlife
- Business Oregon and the Infrastructure Finance Authority (IFA)
- Oregon State Marine Board (OSMB)
- Oregon Public Ports Association
- Port tenants
- Oregon Board of Maritime Pilots
- Oregon Department of Transportation (ODOT) and the ODOT Rail Division
- Oregon Rail Users League
- South West Area Commission on Transportation and the Lane Area Commission on Transportation
- Oregon Freight Advisory Committee
- South Slough National Estuarine Research Reserve
- Oregon Institute of Marine Biology of the University of Oregon
- Charleston Merchants Association
- Pacific Coast Shellfish Growers Association
- Oregon Coastal Caucus
- U.S. Army Corps of Engineers (USACE)
- State regulatory agencies
- Federal regulatory agencies
- Local school districts
- Southwestern Oregon Community College (SWOCC)
- Travel Southwest Oregon Coast (TSOC)

- Coquille Indian Tribe
- Confederated Tribes of Coos, Lower Umpqua, and Siuslaw Indians (CTCLUSI)
- Regional Solutions Team
- Southern Oregon Workforce Investment Board (SOWIB)

5. Defining the Problem

In the following sections, we will tie together the Port's development efforts and the economic needs and opportunities of the region. This includes defining potential problems due to demographic trends, workforce trends, and economic market trends as well. However, problems also provide opportunities for growth which can be found in industry trends, international trade markets, and regional tourism efforts.

Demographic Profile

Trends in Population Growth

Population growth generally signals a growing economy and increased demand for resources and industries in a region.

The cities of Coos Bay and North Bend make up a large part of the Port of Coos Bay's District and have populations of almost 16,000 and 10,000, respectively (Table 5.1). However, the population of Coos Bay has declined 0.5% since 2010, while North Bend has grown 5.4% over the same period. Both cities experienced much smaller growth rates than the United States and Oregon, which grew 9.4% and 12.7%, respectively. Coos County also had a much smaller growth rate, increasing just 2.4%.

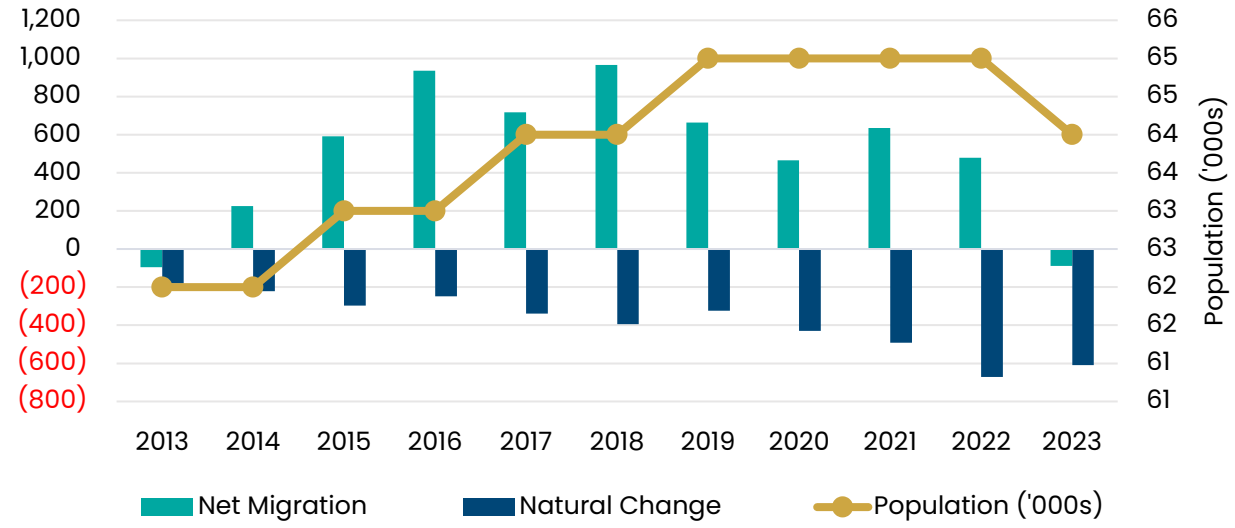
Table 5.1: Population Change, 2010–2023

Area	2010 Population	2023 Population	Numerical Change	% Change
Coos Bay	15,944	15,867	(77)	(0.5%)
North Bend	9,710	10,231	521	5.4%
Coos County	63,319	64,832	1,513	2.4%
Oregon	3.8M	4.2M	476,789	12.7%
United States	304.0M	332.4M	28.4M	9.4%

Source: U.S. Census Bureau, 2010 and 2023 5-Year Estimates, Table DP05

Population change is driven by three factors: births, deaths, and migration. Figure 5.1 and Figure 5.2 illustrate the influence of these factors on the population over the last decade. In Coos County, the natural change (births minus deaths) has negatively influenced the growth rate while net migration has positively influenced the population growth of the County.

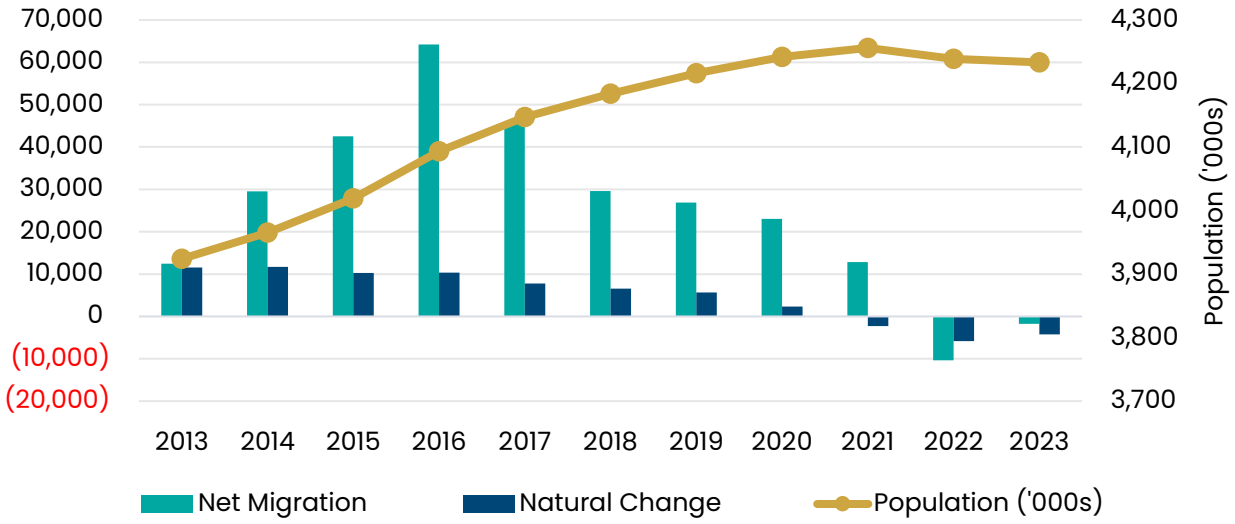
Figure 5.1: Sources of Population Change, Coos County, 2013–2023[9]



Source: U.S. Census Bureau, Population Estimates Program, 2010–2020 and 2020–2023

In Oregon, both migration and natural population change contributed to population growth until 2021, when growth began to slow (Figure 5.2).

Figure 5.2: Sources of Population Change, Oregon, 2013–2023

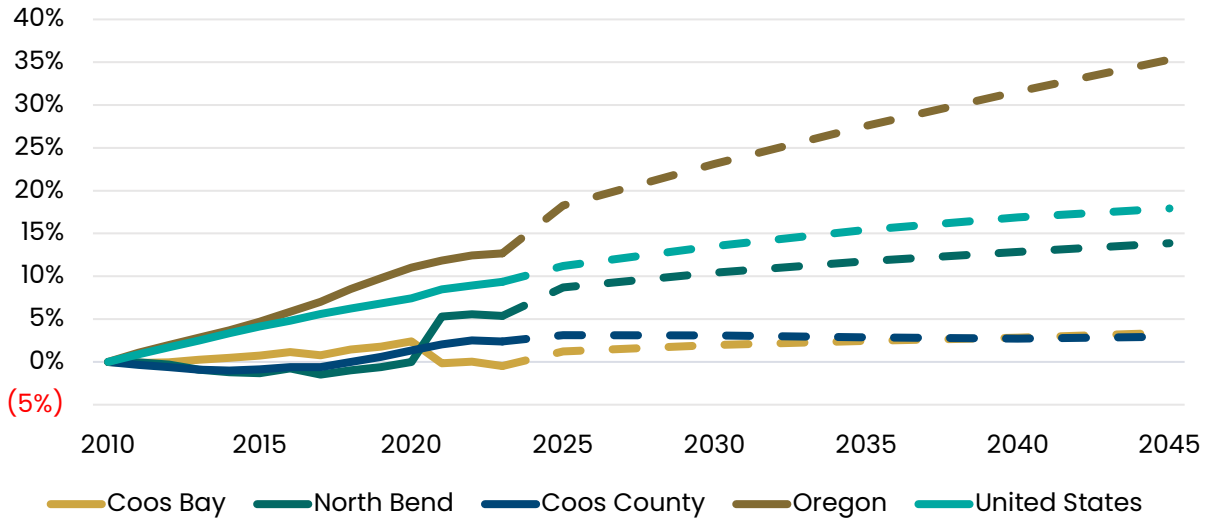


Source: U.S. Census Bureau, Population Estimates Program, 2010–2020 and 2020–2023

[9] For Figure 5.1 and Figure 5.2, PC used the U.S. Census Bureau's Population Estimates Program. Every 10 years when the Census Bureau carries out the decennial Census, the datasets for this program are "re-benchmarked." This may result in a visual break in the population estimates from 2020 to 2021.

Data from Portland State University, shown in Figure 5.3, projects a continuation of these trends. Coos Bay and Coos County are expected to maintain very low but positive growth rates from 2025 to 2045, while North Bend is forecasted to grow at a significantly higher rate (though still below the growth rates of Oregon and the United States).

Figure 5.3: Population Projections, 2010–2045[10]



Source: Portland State University, Population Research Center, and U.S. Census Bureau, 2023

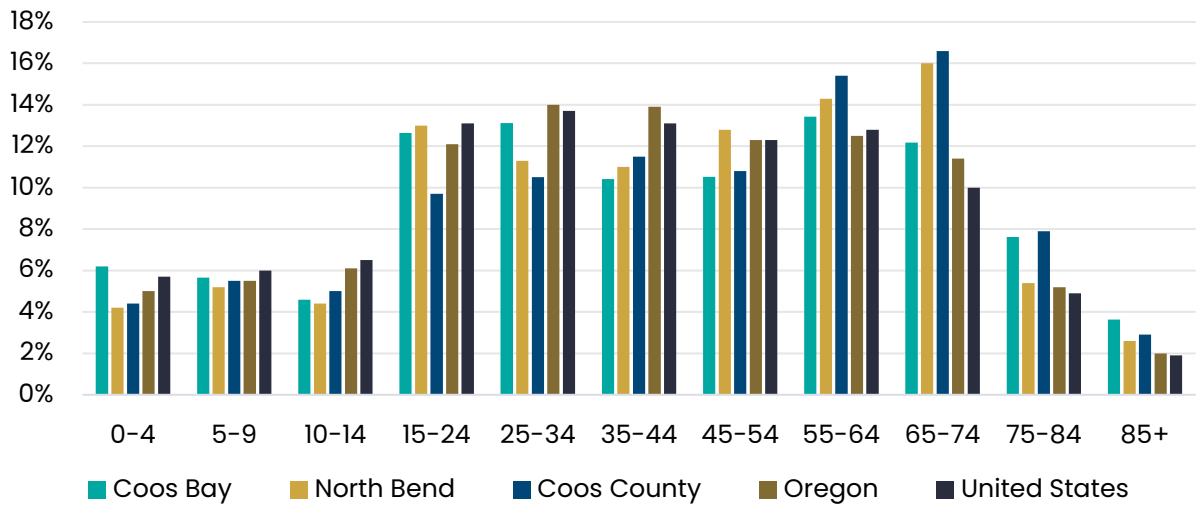
One reason for the low growth rate in Coos Bay is the age distribution of the population. As shown in Figure 5.4, Coos Bay and North Bend tend to have a higher percentage of residents over the age of 55 than Oregon or the United States. Coos County has an even greater share of older residents, with 16.6% of the population between ages of 65 and 74. This is five percentage points above Oregon.

On the younger end of the spectrum, Coos County lags behind both the state and national averages in the share of residents under the age of 25. However, the City of Coos Bay has a slightly higher proportion of residents under 25 than Coos County and is roughly comparable to state and national levels.

Residents in the prime working-age years (25 to 54), who make up the largest group of the region's labor force, constitute about one-third of the population in Coos Bay (34.0%) and North Bend (35.3%). These figures are about five percentage points lower than Oregon (40.2%) and the United States (39.1%).

[10] Dotted line represents forecasted population values.

Figure 5.4: Population by Age Comparison, 2023



Source: U.S. Census Bureau 2023 5-Year Estimates, Table DP05

Ethnicity

Regional diversity in backgrounds, races, and ethnicities can influence various social and economic dynamics. Table 5.2 shows the race and ethnicity distribution for Coos Bay, North Bend, Coos County, Oregon, and the United States.

Coos County and Coos Bay are notably less diverse than Oregon and the nation, with White residents comprising 82.6% of the population. This is about 10 percentage points higher than the state average and 24 percentage points higher than the national average. The second largest group in Coos Bay is residents of Hispanic origin, who make up 8.7% of the population. North Bend is slightly more diverse, with White residents accounting for 77.0% of the population.

Table 5.2: Race and Ethnicity Comparison, 2023

Race/Ethnicity	Coos Bay	North Bend	Coos County	Oregon	U.S.
White alone	82.6%	77.0%	83.0%	72.3%	58.2%
Hispanic Origin	8.7%	9.2%	7.0%	14.3%	19.0%
Black or African American alone	0.6%	0.8%	0.4%	1.8%	12.0%
American Indian & Alaska Native alone	0.8%	2.4%	1.7%	0.7%	0.5%
Asian alone	1.5%	4.2%	1.1%	4.4%	5.7%
Native Hawaiian & Other Pacific Islander alone	0.0%	0.0%	0.0%	0.4%	0.2%
Some Other Race alone	0.3%	0.0%	0.3%	0.5%	0.5%
Two or More Races	5.5%	6.5%	6.5%	5.6%	3.9%

Source: U.S. Census Bureau, 2023 5-Year Estimates, Table DP05

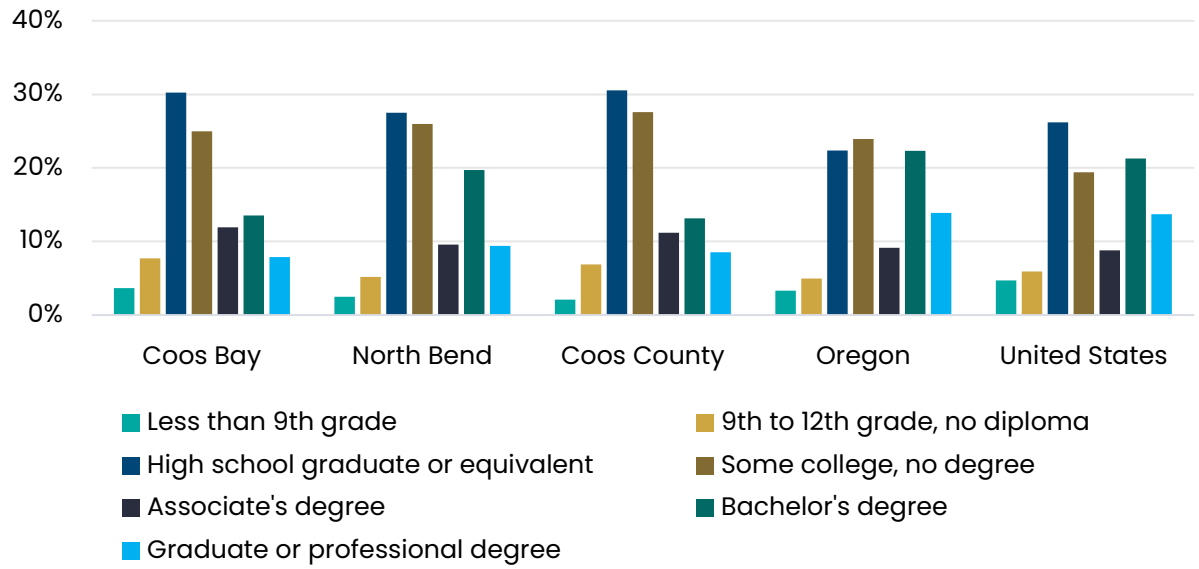
Education

Coos Bay and Coos County have significantly lower percentages of residents with a bachelor's degree or higher. In Coos Bay, only 13.5% of residents hold a bachelor's degree, compared to 22.3% in Oregon and 21.3% nationally (Figure 5.5). North Bend is more comparable to the national average, with 19.7% of residents holding a bachelor's degree.

There is a higher concentration of residents with associate's degrees in both Coos Bay and Coos County (11.9% and 11.2%, respectively) than in Oregon (9.2%) or the United States (8.8%). The region also has higher rates of residents with some college but no degree, as well as those with only a high school diploma.

A few local institutions help improve access to higher education. Southwestern Oregon Community College (SWOCC), located in Coos Bay, offers associate's degrees and career pathway certificates.[11] Access to these programs may help explain the large share of residents with some college but no degree, as they provide a way to gain workforce-relevant skills without completing a full bachelor's degree. In addition, the University of Oregon operates a marine laboratory (the Oregon Institute of Marine Biology) on the coast in Charleston.

Figure 5.5: Educational Attainment, Population 25+, 2023



Source: U.S. Census Bureau, 2023 5-Year Estimates, Table S1501

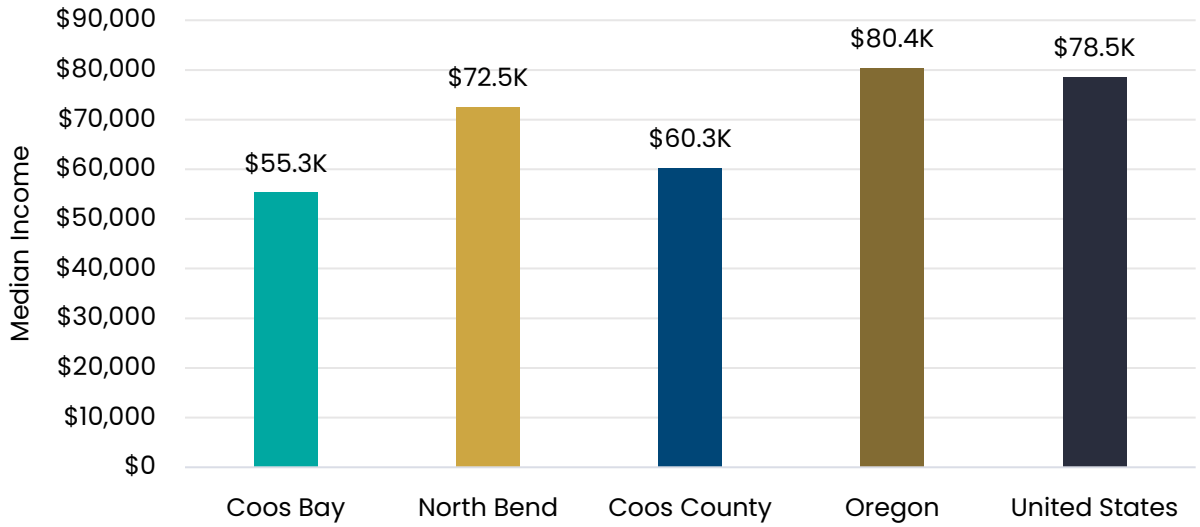
[11] Staff writers, "Southwestern Oregon Community College Overview," *US News & World Report*, accessed June 2, 2025, https://www.usnews.com/education/community-colleges/southwestern-oregon-community-college-CC08236.

Income

Household income levels play a significant role in the economic development of a region. They reflect the current state of the regional economy and signal what types of jobs are available (or may be needed) to drive further economic development.

Coos Bay has a median household income of approximately $55K, which is well below both the national and state averages of around $80K (Figure 5.6). North Bend's median income is much closer to those benchmarks at $72.5K, while Coos County as a whole has a median household income of about $60K.

Figure 5.6: Median Household Income, 2023

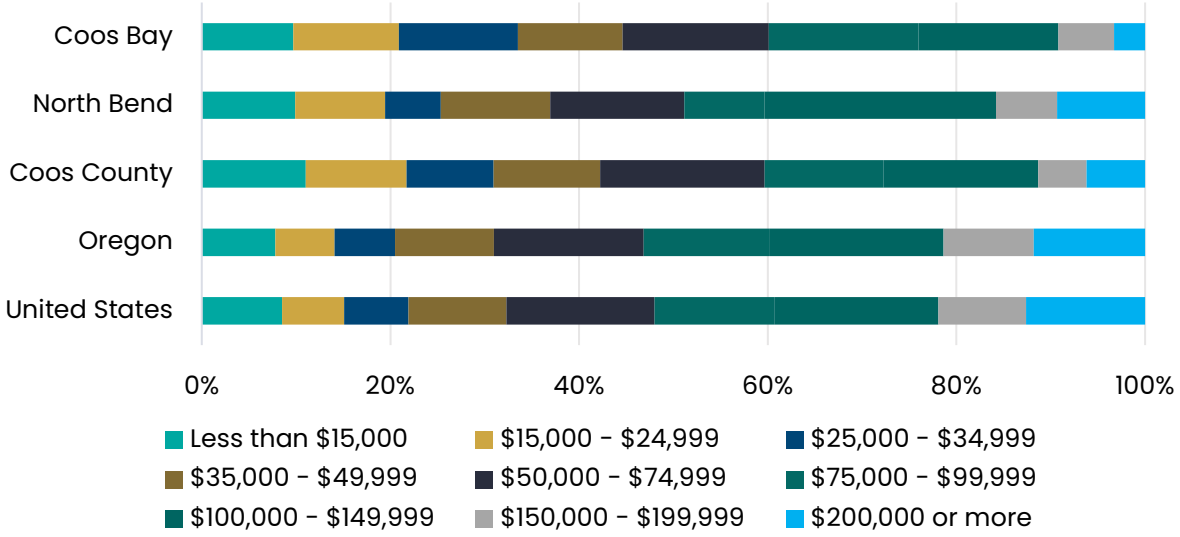


Source: U.S. Census Bureau, 2023 5-Year Estimates Table S1901

Figure 5.7 illustrates the distribution of income in Coos Bay, North Bend, and Coos County compared to the state and nation. Coos Bay and Coos County have much larger shares of residents earning less than $35K and significantly fewer residents earning more than $150K.

North Bend, by contrast, has a greater share of residents in the higher income brackets compared to both Coos Bay and Coos County. Roughly 40% of North Bend households earn over $100,000. This is roughly equal to the share of households in Oregon or the United States.

Figure 5.7: Distribution of Household Income, 2023

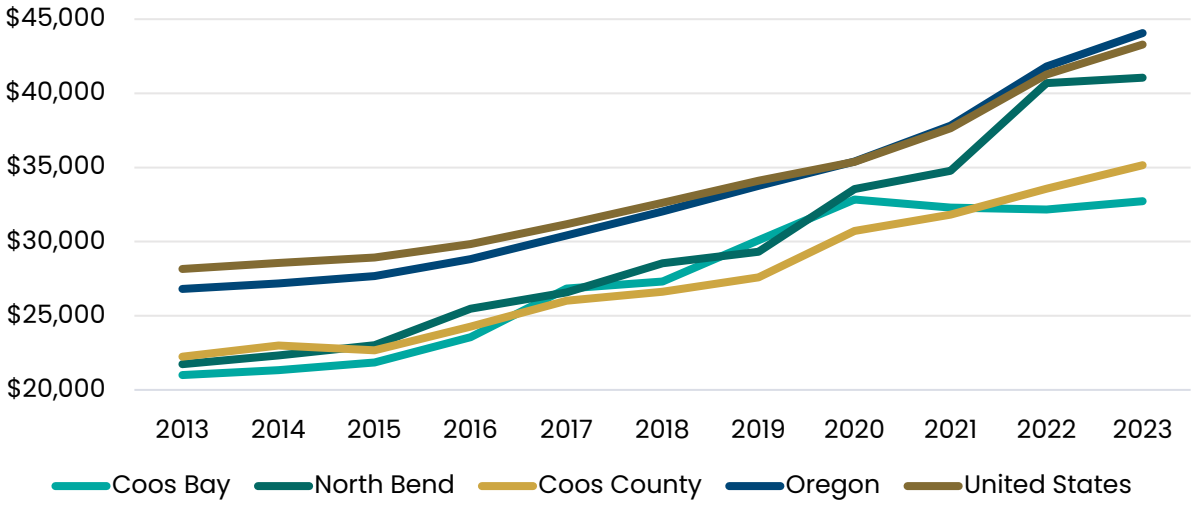


Source: U.S. Census Bureau, 2023 5-Year Estimates, Table S1901

Per capita income measures the average income per person within a given region and is a useful metric for comparing wealth and assessing economic well-being. As shown in Figure 5.8, per capita income increased steadily from 2013 to 2020 across all regions. At that point, growth in Coos Bay stagnated, and Coos County experienced a noticeable slowdown.

North Bend's per capita income continued to rise until 2022 but has also stagnated since then. This regional slowdown may signal the need for renewed economic investment or strategies to reinvigorate income growth.

Figure 5.8: Per Capita Income, 2013–2023



Source: U.S. Census Bureau, 2013–2023, 5-Year Estimates, Table B19301

Poverty

Residents living in poverty face significant financial constraints that limit their ability to spend at average levels. When a substantial portion of a population is financially constrained, the broader local economy can also be affected.

Coos Bay, North Bend, and Coos County Report a higher poverty rates than Oregon and the United States (Table 5.3). Among them, the City of Coos Bay has the lowest poverty rate at 14.2%, followed by North Bend at 15.5% and Coos County at 15.6%

Table 5.3: Population in Poverty, 2023

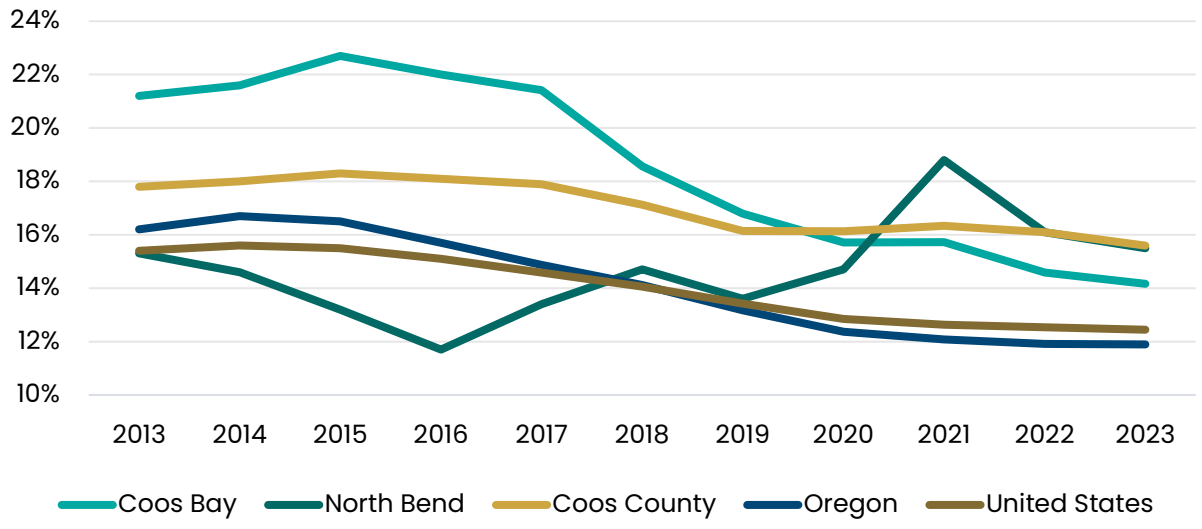
Area	Number of People in Poverty	Percent of People in Poverty
Coos Bay	2,205	14.2%
North Bend	1,570	15.5%
Coos County	9,935	15.6%
Oregon	0.5M	11.9%
United States	40.4M	12.4%

Source: U.S. Census Bureau, 2023, 5-Year Estimates, Table S1701

Figure 5.9 shows that poverty rates have declined significantly since 2013 in the United States, Oregon, Coos County, and especially Coos Bay. In 2013 Coos Bay's poverty rate was about 6 percentage points higher than the national rate. By 2023, that gap had narrowed to just under 2 percentage points.

North Bend's poverty rate declined between 2013 and 2016, then rose to a peak in 2021 before falling to align with Coos County's rate.

Figure 5.9: Percentage of the Population in Poverty, 2013–2023



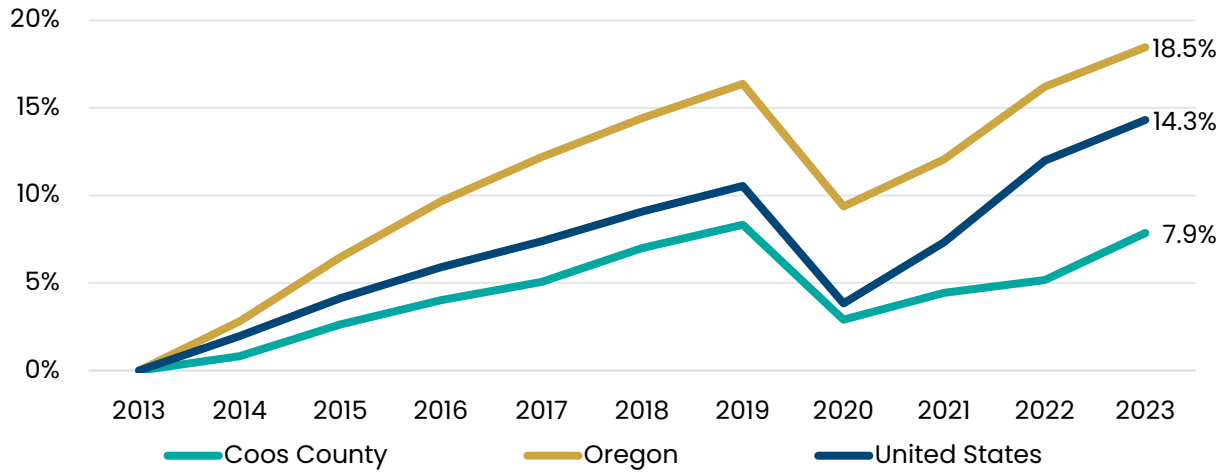
Source: U.S. Census Bureau, 2013–2023 5-Year Estimates, Table S1701

Economic Profile

Labor Force, Earnings, and Establishments

The growth of the labor force and establishment of new businesses in a region are essential for economic development and can be predictors of other areas of growth in the region. Figure 5.10–Figure 5.13 display employment, establishment, and wage growth rates in Coos County, Oregon, and the United States. Across all geographies, employment growth slowed significantly in 2020 during the COVID pandemic. However, Coos County has experienced the slowest rebound in growth rates since then.

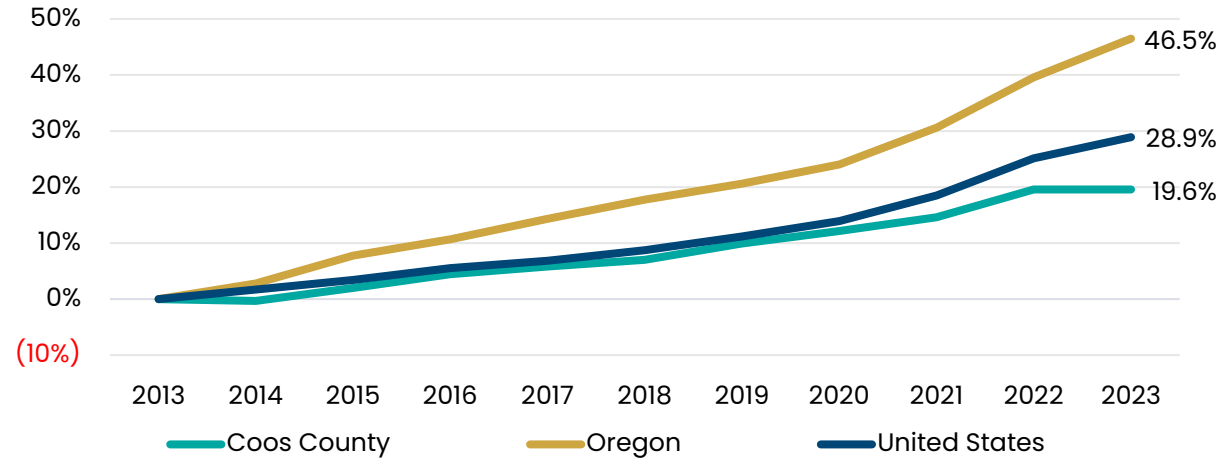
Figure 5.10: Cumulative Annual Growth in Employment, 2013–2023



Source: Bureau of Labor Statistics, Quarterly Census of Employment and Wages

With respect to establishment growth, Coos County kept pace with the national growth rate until around 2021 but stagnated between 2022 and 2023 (Figure 5.11). Since 2013, Oregon has grown much faster than both Coos County and the national average.

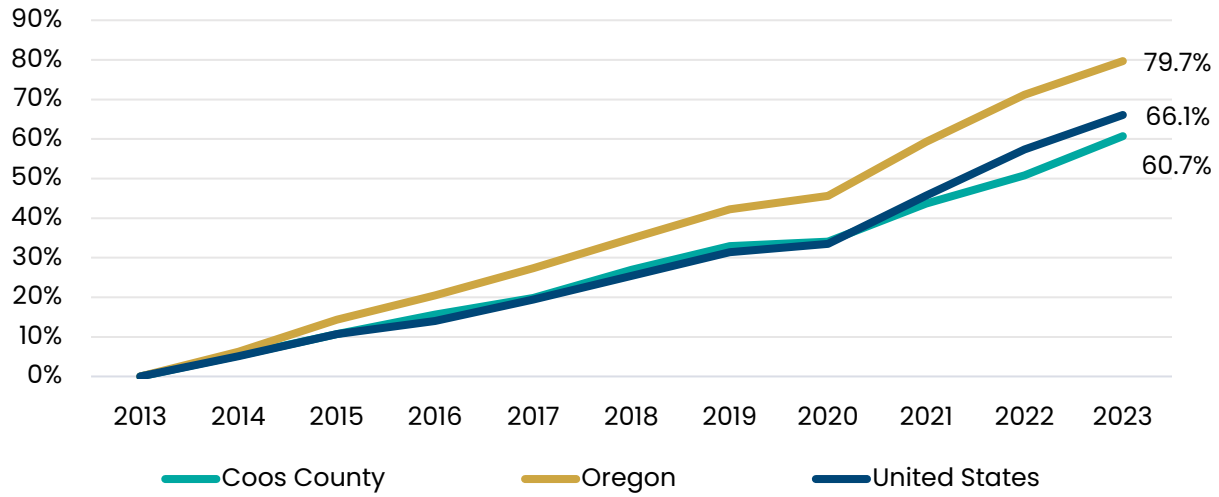
Figure 5.11: Cumulative Annual Growth in Establishments, 2013–2023



Source: Bureau of Labor Statistics, Quarterly Census of Employment and Wages

Wages have followed similar trends. Coos Bay has generally matched the national growth rate, with the exception of 2022 (Figure 5.12). Oregon's wages, however, have grown faster than the national average. Additionally, wages have significantly outpaced employment growth, indicating that the increase is not solely due to more people entering the workforce but also reflects higher earnings per worker.

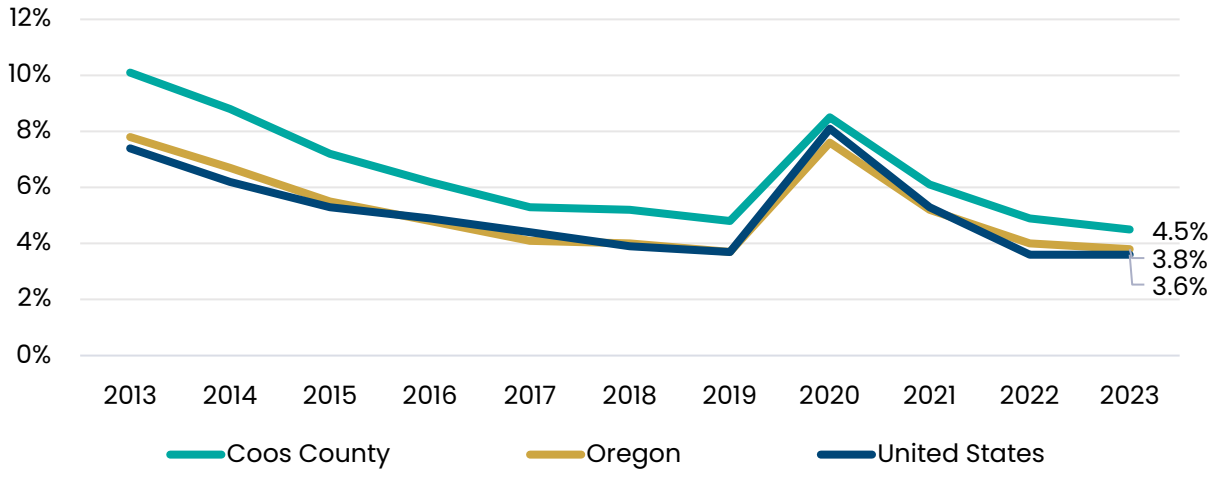
Figure 5.12: Cumulative Annual Growth in Total Wages, 2013–2023



Source: Bureau of Labor Statistics, Quarterly Census of Employment and Wages

Figure 5.13 shows the annual unemployment rate over the same period. Overall, unemployment has trended downwards since 2013, with a notable spike in 2020 due to the pandemic. Coos County has consistently had a slightly higher unemployment rate (about one percentage point above the state and national averages).

Figure 5.13: Annual Unemployment Rate, 2013–2023



Source: Bureau of Labor Statistics, Local Area Unemployment Statistics and Current Population Survey

Employment by Industry

Examining employment data by industry helps identify the employment clusters in a region. These clusters often require different regional amenities depending on factors such as income levels and the transient nature of the workforce. For instance, many health care workers follow rotating or traveling schedules, spending only a few weeks or months in one location. They may not need a long-term housing and may be less influenced by the availability of recreational amenities.

In contrast, local government employees typically prefer to live near their workplace and require permanent housing. Because they spend most of their time in the area, they are more likely to seek things like recreational amenities. Overall, employment by industry can shape economic development decisions in a region.

The three largest industries in Coos Bay are Health care & Social Assistance (13.3%), Retail Trade (12.7%), and Accommodation & Food Services (10.9%). Retail Trade and Accommodation & Food Services are both pieces of the tourism industry, which has been a recent focus of Coos Bay.

Location quotients (LQs) compare the relative concentration of industries in a region to the national average. For example, Manufacturing accounts for about 4.1% of employment in Coos Bay and has an LQ of 0.41. This indicates that Coos Bay's share of Manufacturing employment is roughly 41.0% of the national share, which is about 10%. As shown in Table 5.4, Agriculture, Forestry & Fishing has the highest LQ in Coos Bay at 5.64, followed by Arts, Entertainment & Recreation at 3.00. These high LQs indicate that these industries form significant employment clusters in Coos Bay compared to the national average.

Table 5.4: Employment by Industry in Coos Bay, 2024

Industry	% Employment	LQ
Agriculture, Forestry, Fishing & Hunting	6.2%	5.64
Mining, Quarrying, & Oil & Gas	0.0%	0.00
Construction	3.8%	0.55
Manufacturing	4.1%	0.41
Wholesale Trade	1.6%	0.80
Retail Trade	12.7%	1.21
Transportation & Warehousing	3.1%	0.61
Utilities	0.1%	0.11
Information	2.6%	1.30
Finance & Insurance	2.7%	0.56
Real Estate & Rental & Leasing	1.7%	0.94
Professional, Scientific & Technical	3.5%	0.42
Management of Companies & Enterprises	0.0%	0.00

Administrative & Support & Waste Management & Remediation Services	7.9%	1.84
Educational Services	8.8%	0.97
Health Care & Social Assistance	13.3%	0.94
Arts, Entertainment & Recreation	6.9%	3.00
Accommodation & Food Services	10.9%	1.60
Other Services (except Public Administration)	4.9%	1.07
Public Administration	5.2%	1.04

Source: Esri Business Analyst, 2024

Table 5.5 compares Coos Bay and North Bend's employment by industry to that of Coos County and Oregon. Notably, Coos County has a high concentration of employment in the Arts, Entertainment & Recreation sector (7.1%) compared to Oregon (2.3%). In contrast, the concentration of employment in the Professional, Scientific & Technical sector in Coos County is about half that of Oregon, and even lower in Coos Bay and North Bend.

Table 5.5: Employment by Industry Comparison, 2024

Industry	Coos Bay	North Bend	Coos County	Oregon
Agriculture, Forestry, Fishing & Hunting	6.2%	3.4%	6.3%	2.5%
Mining, Quarrying, & Oil & Gas	0.0%	0.0%	0.1%	0.1%
Construction	3.8%	6.9%	5.9%	6.8%
Manufacturing	4.1%	3.7%	5.6%	10.6%
Wholesale Trade	1.6%	1.9%	1.0%	1.9%
Retail Trade	12.7%	11.9%	12.1%	11.6%
Transportation & Warehousing	3.1%	2.7%	3.7%	3.7%
Utilities	0.1%	0.1%	0.3%	0.7%
Information	2.6%	1.4%	2.4%	1.6%
Finance & Insurance	2.7%	1.9%	2.2%	3.6%
Real Estate & Rental & Leasing	1.7%	2.0%	1.4%	2.0%
Professional, Scientific & Technical	3.5%	3.1%	4.3%	8.3%
Management of Companies	0.0%	0.0%	0.0%	0.2%
Administrative & Support & Waste Management & Remediation Services	7.9%	5.9%	5.7%	4.0%
Educational Services	8.8%	7.0%	8.7%	8.5%
Health Care & Social Assistance	13.3%	13.8%	12.8%	14.6%
Arts, Entertainment & Recreation	6.9%	8.0%	7.1%	2.3%
Accommodation & Food Services	10.9%	10.5%	9.7%	7.5%
Other Services (except Public Administration)	4.9%	4.5%	4.6%	4.5%
Public Administration	5.2%	11.1%	6.1%	4.8%

Source: Esri Business Analyst, 2024

Table 5.6 presents employment by occupation, detailing the types of roles workers hold within industries, such as management, sales or administrative positions. In Coos Bay the largest occupational group is Food Preparation & Serving (11.6%) followed by Office & Administrative Support (10.1%). In contrast, the largest occupation is North Bend is Management (10.4%) followed closely by Food Preparation & Serving (10.3%).

Table 5.6: Employment by Occupation Comparison, 2024

Occupation	Coos Bay	North Bay	Coos County	Oregon
Management	6.3%	10.4%	8.7%	12.7%
Business & Financial	2.7%	2.3%	2.8%	6.0%
Computer & Mathematical	1.9%	1.1%	1.0%	4.3%
Architecture & Engineering	2.2%	1.0%	1.7%	3.0%
Life, Physical & Social Sciences	1.4%	0.2%	1.4%	1.3%
Community & Social Service	2.4%	7.7%	3.0%	2.1%
Legal	1.1%	1.1%	0.9%	1.1%
Education, Training & Library	7.3%	8.0%	6.9%	5.8%
Arts, Design & Entertainment	3.5%	3.7%	3.0%	2.7%
Health care Practitioner	3.2%	6.3%	4.4%	6.1%
Sales & Sales Related	7.4%	8.7%	8.4%	8.1%
Office & Administrative Support	10.1%	6.3%	8.6%	9.6%
Farming, Fishing & Forestry	4.2%	1.8%	3.6%	1.1%
Construction & Extraction	3.6%	5.8%	5.6%	4.6%
Installation, Maintenance & Repair	2.5%	1.3%	2.5%	2.7%
Production	4.5%	3.0%	4.4%	4.5%
Transportation & Material Moving	8.0%	5.7%	7.2%	6.9%
Health care Support	6.4%	3.4%	6.1%	4.1%
Protective Service	2.6%	3.8%	2.4%	1.7%
Food Preparation & Serving	11.6%	10.3%	9.1%	6.1%
Building Maintenance	3.4%	4.2%	4.5%	3.1%
Personal Care & Service	3.5%	3.9%	4.1%	2.5%

Source: Esri Business Analyst, 2024

Industry Trends

In addition to identifying the existing clusters shown above, industry trends also provide insight into which industries are growing, declining, or have matured. Rapidly growing Industries often represent strong opportunities for investment, as the potential for return is typically higher. In contrast, declining industries may pose a liability, as continued investment in shrinking sectors is less likely to yield a return.

This analysis examines employment trends over the last 10 years using the North American Industry Classification System (NAICS). NAICS organizes economic activity into a structured hierarchy based on the type of work performed by businesses. Sectors are broad groupings classified by two-digit codes, while industries represent more

detailed categories within those sectors, using three-, four-, five-, or six-digit codes. For this analysis, PC focuses on two-digit sector trends and selected four-digit industry trends.

The following data are all at the county level rather than the local level. Counties are widely regarded as accurate geographic boundaries for regional economies and also provide more precise data as larger population numbers produce larger sample sizes and lower margins of error in data sampling. Additionally, county level data was more widely available than local level data for our analysis. Coos County is a good measure for the local economy relevant to the Port because the bay area is the most concentrated area of the County. So, Coos County estimates will be weighted towards the bay area in terms of estimates. Coos County data may also provide insight to industries in the County overall that the Port could look to invest in to enhance the regional economy.

Employment trends for each sector in Coos County over the past decade are reported in Table 5.7. The five fastest-growing sectors by percentage change are:

- Arts, Entertainment, & Recreation (+166.2%)
- Construction (+48.3%)
- Real Estate & Rental & Leasing (+29.5%)
- Wholesale Trade (+26.4%)
- Accommodation & Food Services (+20.9%)

Notably, two of the top five sectors (Arts, Entertainment & Recreation and Accommodation & Food Services) are a typically associated with tourism. This suggests a potential opportunity for the Port to align with and support sectors that are already driving local growth.

By contrast, Educational Services (+3.8%), Retail Trade (+0.6%), and Utilities (-1.6%) represent relatively mature sectors. These have shown little change, neither growing nor declining more than 5% over the past decade. This indicates an employment base that is stable but not growing.

Three sectors have experienced steep declines:

- Manufacturing (-12.4%)
- Agriculture, Forestry, Fishing, & Hunting (-24.4%)
- Information (-28.4%)

Both Manufacturing and Agriculture, Forestry, Fishing, & Hunting have each lost more than 200 jobs over the past decade. While these sectors still employ a relatively large number of workers, they may require substantial investment to be revitalized, or they may represent areas for potential divestment due to sustained decline.

Table 5.7: Sector-Level Employment Trends, Coos County, 2014–2024

NAICS Sector	2014 Emp	2024 Emp	Change	% Change
Arts, Entertainment, & Recreation	157	418	261	166.2%
Construction	770	1,142	372	48.3%
Real Estate and Rental & Leasing	220	285	65	29.5%
Wholesale Trade	345	436	91	26.4%
Accommodation & Food Services	2,711	3,277	566	20.9%
Professional, Scientific, & Technical Services	434	481	47	10.8%
Health Care & Social Assistance	4,525	4,987	462	10.2%
Public Administration	1,357	1,460	103	7.6%
Finance & Insurance	465	497	32	6.9%
Management of Companies & Enterprises	149	158	9	6.0%
Educational Services	1,405	1,459	54	3.8%
Retail Trade	2,911	2,928	17	0.6%
Utilities	125	123	(2)	(1.6%)
Transportation & Warehousing	955	916	(39)	(4.1%)
Administrative & Support & Waste Management and Remediation Services	1,640	1,528	(112)	(6.8%)
Mining, Quarrying, & Oil & Gas Extraction	28	26	(2)	(7.1%)
Other Services (except Public Administration)	670	613	(57)	(8.5%)
Manufacturing	1,701	1,490	(211)	(12.4%)
Agriculture, Forestry, Fishing & Hunting	960	726	(234)	(24.4%)
Information	229	164	(65)	(28.4%)

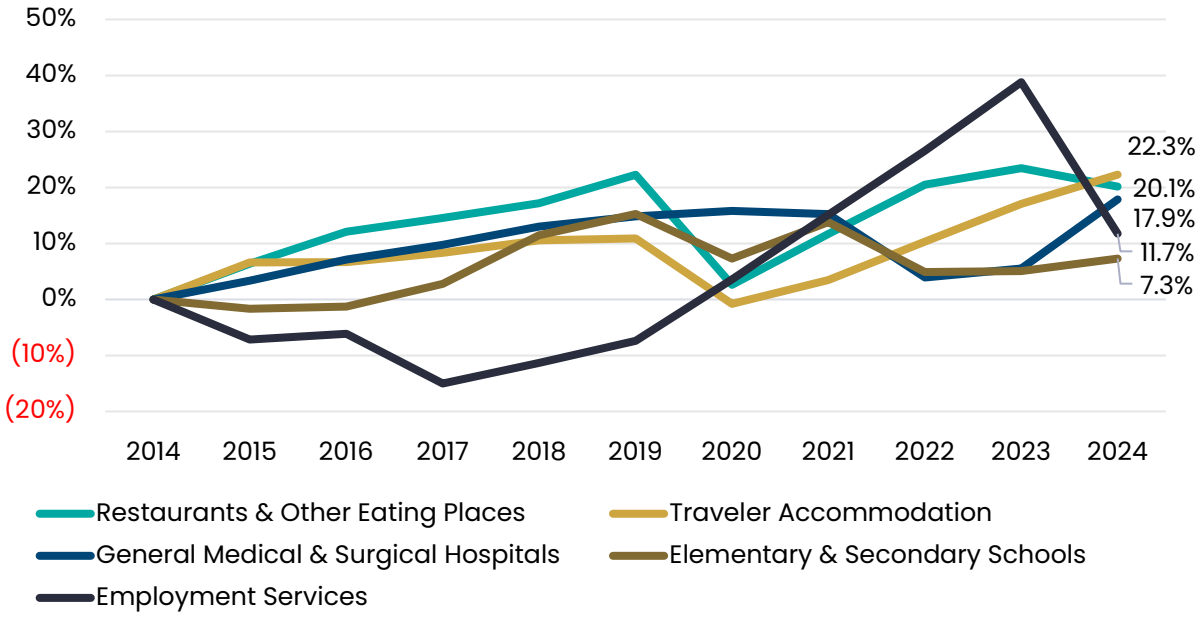
Source: Data Tactical Group, 2025

As reported in Table 5.8, the five largest four-digit industries in Coos County by employment are:

- Restaurants & Other Eating Places
- Traveler Accommodation
- General Medical & Surgical Hospitals
- Elementary & Secondary Schools
- Employment Services

Growth trends for these top five industries over the last 10 years are illustrated in Figure 5.14. Four of the five industries experienced steady growth until the COVID-19 pandemic in 2020. Since then, recovery has been slow. Of the five, only Traveler Accommodation and General Medical & Surgical Hospitals have returned to (or surpassed) their pre-pandemic employment levels.

Figure 5.14: Employment Trends of the Five Largest Industries, Coos County, 2014–2024



Source: Data Tactical Group, 2025

Of the top 15 industries by 2024 employment, three have experienced declines over the past 10 years:

- Warehouse Clubs, Supercenters, & Other General Merchandise Retailers (-1.5%)
- Sawmills & Wood Preservation (-15.4%)
- Logging (-40.0%)

Employment losses in Sawmills & Wood Preservation and Logging are likely linked to the closure of the former Georgia Pacific mill, and a now Port-owned asset in Terminal One. However, these industries have also seen broader declines across Oregon due to increasingly stringent environmental regulations.[12]

The fastest-growing industry among the top 15 is Residential Building Construction (+70.3%). National demand for more housing likely contributes to this growth, along with regional factors such as a new 400-unit development in Coos Bay.[13] Ongoing housing shortages will contribute to continued growth in this sector, especially if the Port is able to develop its 100+ acres of residentially zoned land in Eastside.

[12] "Land Use Compatibility Statement," Oregon Department of Environmental Quality, Accessed September 30, 2025, https://www.oregon.gov/deq/permits/pages/lucs.aspx?utm.
[13] "Largest housing development project with 400 new homes to be built in Coos County," Lexi Ryan, KCBY 11, November 26, 2024, https://kcby.com/news/local/largest-housing-development-project-with-400-new-homes-to-be-built-in-coos-county.

Table 5.8: Top 15 Industries by 2024 Employment, Coos County, 2014–2024

Industry	Workers '14	Workers '24	Change	% Change
Restaurants & Other Eating Places	1,297	1,558	261	20.1%
Traveler Accommodation	1,270	1,553	283	22.3%
General Medical & Surgical Hospitals	1,232	1,452	220	17.9%
Elementary & Secondary Schools	1,081	1,160	79	7.3%
Employment Services	946	1,057	111	11.7%
Individual & Family Services	938	954	16	1.7%
Executive, Legislative, & Other General Government Support	752	875	123	16.4%
Grocery & Convenience Retailers	634	741	107	16.9%
Offices of Physicians	496	640	144	29.0%
Warehouse Clubs, Supercenters, & Other General Merchandise Retailers	618	609	(9)	(1.5%)
Sawmills & Wood Preservation	441	373	(68)	(15.4%)
Continuing Care Retirement Communities & Assisted Living Facilities for the Elderly	261	345	84	32.2%
Veneer, Plywood, & Engineered Wood Product Manufacturing	310	311	1	0.3%
Logging	515	309	(206)	(40.0%)
Residential Building Construction	165	281	116	70.3%

Source: Data Tactical Group, 2025

Table 5.9–Table 5.11 show the fastest-growing industries, matured industries, and fastest-declining industries in Coos County over the past 10 years.[14]

Fastest growing industries:

- Residential Building Construction (+70.3%)
- Automotive Repair & Maintenance (+49.0%)
- Home Health Care Services (+44.4%)

Three most "mature" industries (sectors with minimal growth or some decline):

- Veneer, Plywood, & Engineered Wood Product Manufacturing (+0.3%)
- Warehouse Clubs, Supercenters & Other General Merchandise Retailers (-1.5%)
- Individual & Family Services (+1.7%)

Fastest-declining industries:

- Business Support Services (-90.3%)
- Private Households (-76.4%)
- Electronics & Appliance Retailers (-68.8%)

[14] Of industries with 100 workers or more.

Table 5.9: Top 10 Fastest Growing Industries, Coos County, 2014–2024

Industry	Workers '14	Workers '24	Change	% Change
Residential Building Construction	165	281	116	70.3%
Automotive Repair & Maintenance	102	152	50	49.0%
Home Health Care Services	178	257	79	44.4%
Offices of Other Health Practitioners	193	261	68	35.2%
Building Equipment Contractors	165	219	54	32.7%
Continuing Care Retirement Communities & Assisted Living Facilities for the Elderly	261	345	84	32.2%
Architectural, Engineering, & Related Services	100	131	31	31.0%
Offices of Physicians	496	640	144	29.0%
Automotive Parts, Accessories, & Tire Retailers	118	149	31	26.3%
Highway, Street, & Bridge Construction	188	235	47	25.0%

Source: Data Tactical Group, 2025

Table 5.10: Mature Industries in Coos County, 10-Year Employment Change, 2014–2024

Industry Name	Workers '14	Workers '24	Change	% Change
Management of Companies & Enterprises	149	158	9	6.0%
Postal Service	101	107	6	5.9%
Grocery & Related Product Merchant Wholesalers	111	117	6	5.4%
Services to Buildings & Dwellings	198	204	6	3.0%
Individual & Family Services	938	954	16	1.7%
Veneer, Plywood, & Engineered Wood Product Manufacturing	310	311	1	0.3%
Warehouse Clubs, Supercenters & Other General Merchandise Retailers	618	609	(9)	(1.5%)
Offices of Dentists	187	179	(8)	(4.3%)

Source: Data Tactical Group, 2025

Table 5.11: Top 10 Fastest Declining Industries, Coos County, 2014–2024

Industry Name	Workers '14	Workers '24	Change	% Change
Business Support Services	279	27	(252)	(90.3%)
Private Households	123	29	(94)	(76.4%)
Electronics & Appliance Retailers	112	35	(77)	(68.8%)
Junior Colleges	302	105	(197)	(65.2%)
Specialized Freight Trucking	197	89	(108)	(54.8%)
Department Stores	222	122	(100)	(45.0%)
Logging	515	309	(206)	(40.0%)
Vocational Rehabilitation Services	233	152	(81)	(34.8%)

Nursing Care Facilities (Skilled Nursing Facilities)	359	261	(98)	(27.3%)
Seafood Product Preparation & Packaging	252	192	(60)	(23.8%)

Source: Data Tactical Group, 2025

Top Employers

Table 5.12 reports the 16 largest employers in the South Coast region of Oregon. All businesses and organizations represent potential partners or industries the Port of Coos Bay could seek to complement or augment. The Bay Area Hospital is the largest employer in the region with over 1,000 employees, followed by the Coquille Indian Tribe and Bandon Dunes Golf Resort with 800 and 795 employees respectively.[15]

Table 5.12: Top Employers on the South Coast

Rank	Business/Organization	Employees	Location
1	Bay Area Hospital	1,094	Coos Bay
2	Coquille Indian Tribe	800	Coos Bay
3	Bandon Dunes Golf Resort	795	Bandon
4	Confederated Tribes of Coos, Lower Umpqua, and Siuslaw Indians (CTCLUSI)	562	Florence/Coos Bay
5	South Coast Lumber Company	500+	Brookings
6	North Bend School District	485	North Bend
7	North Bend Medical Center	450	North Bend
8	Southwestern Oregon Community College (SWOCC)	403	Coos Bay/Brookings
9	U.S. Coast Guard	382	Florence, Winchester Bay, North Bend, Coos Bay, Brookings
10	Wal-Mart	362	Coos Bay
11	McKay's Markets	354	Bandon, Brookings, Coos Bay, Coquille, Gold Beach, Lakeside, Myrtle Point, Reedsport
12	Coos Bay School District	350	Coos Bay
13	Coos County (Government)	340	Coquille
14	Roseburg (Forest Products)	320	North Bend, Coquille
15	Southport Lumber	240	Coos Bay
16	Coquille Valley Hospital	200	Coquille

Source: South Coast Development Council, 2025

[15] "Top Employers," South Coast Development Council, Accessed September 29, 2025, https://scdcinc.org/data/top-employers/.

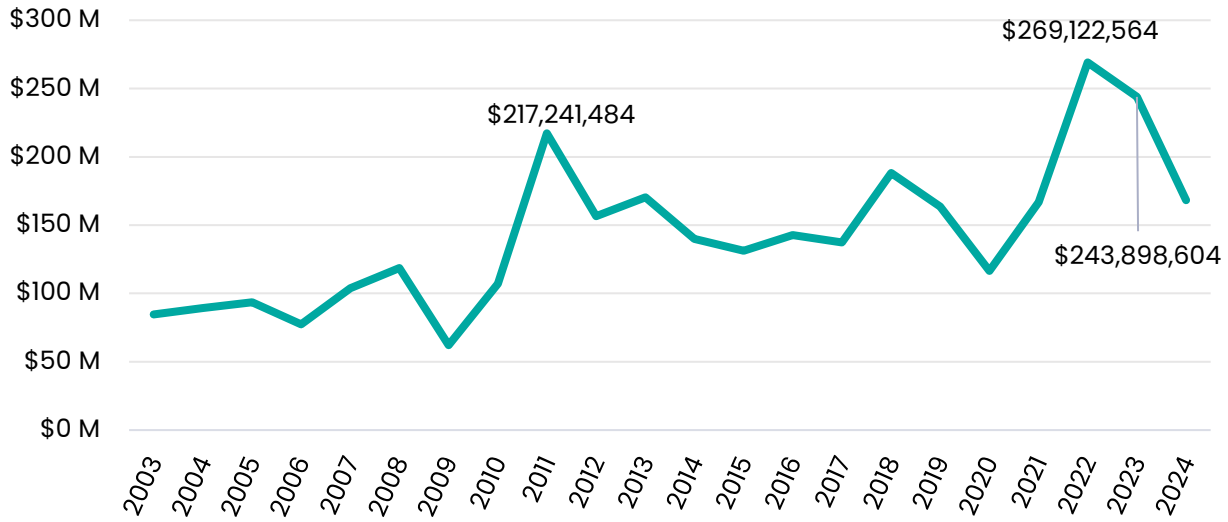
Trade

In the post–World War II era, international trade has been a foundational component of the global economy. Trade between countries can take two forms (exports and imports) depending on the perspective. Exporting involves producing and sending goods and services to another country. Importing involves purchasing goods and services from abroad and bringing them into a business or individual's home country. Although the United States does not export as much as it once did, it continues to import significant volumes. As a coastal port, the Port of Coos Bay (and the surrounding regional economy) is well positioned to take advantage of both exports and imports.

Exports

As noted, the United States is no longer a major export powerhouse. Despite this, the total value of exports from the Coos Bay harbor (as reported by U.S.A. Trade Online) increased from approximately $85 million in 2003 to a peak of nearly $270 million in 2022 (Figure 5.15). While the total value of exports in 2024 was closer to $168 million, exports from Coos Bay have still nearly doubled over the past 20 years.

Figure 5.15: Total Value of Exports from the Port of Coos Bay, 2003–2024



Source: U.S.A. Trade Online

Table 5.13 shows the total value of exports from Coos Bay harbor compared to the overall value of exports for Oregon, the Columbia-Snake trade district, and the Port of Portland. Both the Port of Coos Bay and the Port of Portland are included in the Columbia-Snake district, which also encompasses other ports and trade entities. The full list includes:

- Astoria, OR
- Boise, ID
- Coos Bay, OR

- Kalama, WA
- Kingsley Field Klamath Falls, OR
- Longview, WA
- Medford-Jackson County Airport, OR
- Newport, OR
- Portland International Airport, OR
- Portland, OR
- Vancouver, WA

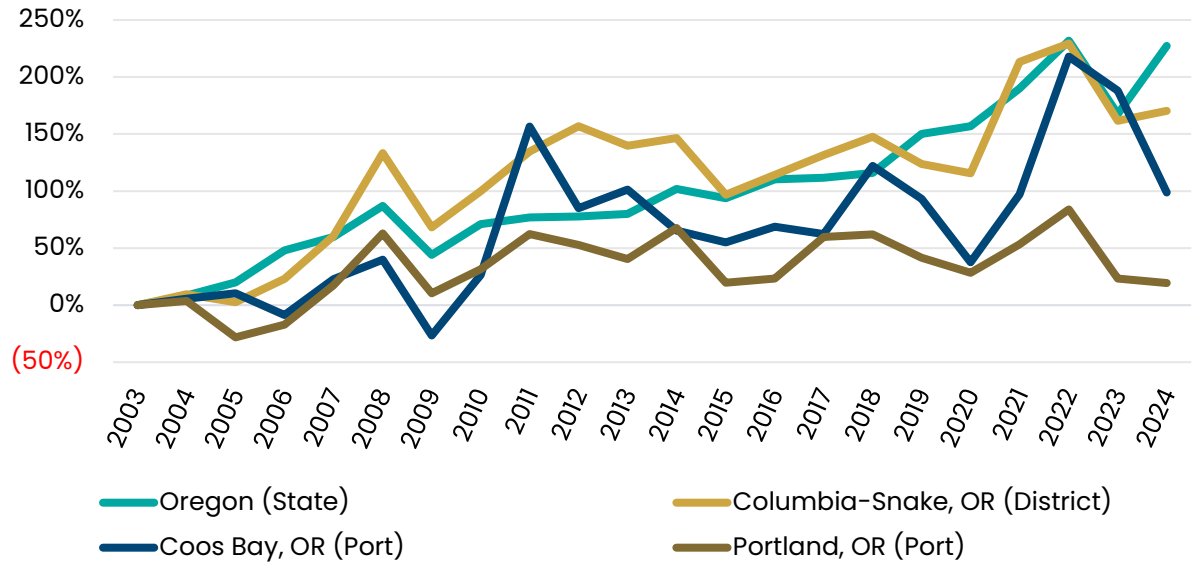
Table 5.13: Total Exports Value by Region, 2004–2024

Region	2004	2009	2014	2019	2024
Oregon (State)	$11,214M	$14,907M	$20,889M	$25,880M	$33,860M
Columbia-Snake, OR (District)	$6,279M	$10,330M	$15,143M	$13,754M	$16,602M
Portland, OR (Port)	$3,268M	$3,473M	$5,283M	$4,458M	$3,759M
Coos Bay, OR (Port)	$89M	$62M	$140M	$164M	$168M

Source: U.S.A. Trade Online

As of 2024, the value of exports out of the Coos Bay harbor has grown by 98.7%, compared to 227.3% in Oregon and 170.2% in the Columbia-Snake district (Figure 5.16). For the Port of Portland, export values have increased by only 19.4% and have actually stagnated or declined since around 2008. While export values through the Port of Portland have plateaued, they have continued to grow across the Columbia–Snake district and the Oregon overall. This trend represents an opportunity for the Port of Coos Bay to capitalize on growing demand in the district and state, particularly as the largest port in the district, Portland, is unable to match this growth.

Figure 5.16: Cumulative Growth of Total Exports Value, Comparison, 2003–2024



Source: U.S.A. Trade Online

While the total value of exports from Coos Bay harbor has grown over the past 20 years, Figure 5.17 shows that the composition of the export economy has changed. From 2003 through 2013, the number of export commodity groups averaged about 8.8, but from 2014 through 2024, this number more than halved to just 3.5.[16] This trend reflects an increasingly undiversified export economy, relying largely on a single type of product for value. Although total export value has increased, the reduction in commodity groups suggests that fewer types of jobs are available in the regional economy.

Figure 5.17: Total Number of Export Commodity Groups from Coos Bay, 2003–2024



Source: U.S.A. Trade Online

Table 5.14 shows while commodity group 44: Wood and Articles of Wood has dominated the value of exports since 2003, other high-value commodity groups have vanished from Coos Bay export activity. These commodity groups include 88: Aircraft, Spacecraft & parts thereof, 84: Nuclear Reactors, Boilers, Machinery, Etc., and 27: Mineral Fuel, Oil, Etc.

From 2021 through 2024, Wood and Articles of Wood accounted for 99.3% of total export value, while the previously high-value commodity groups each contributed 0.0%. This represents a lost opportunity to generate well-paying jobs in industries producing these goods. The data further underscore that Coos Bay's export economy is undiversified, highlighting a potential area for future growth.

[16] The total number of high-level commodity groups available is 99. A full list of commodity groups is available in Appendix D.

Table 5.14: Commodity Group Share of Total Exports Value from Coos Bay, 2003–2024

Commodity Group	% of Total Exports Value, '03–'24	% of Total Exports Value, '14–'24	% of Total Exports Value, '21–'24
44 Wood & Articles Of Wood; Wood Charcoal	98.5%	99.2%	99.3%
88 Aircraft, Spacecraft & Parts Thereof	0.5%	0.5%	0.0%
26 Ores, Slag & Ash	0.3%	0.3%	0.7%
39 Plastics & Articles Thereof	0.3%	0.0%	0.0%
27 Mineral Fuel, Oil Etc.; Bitumin Subst; Mineral Wax	0.1%	0.0%	0.0%
87 Vehicles, Except Railway Or Tramway & Parts Etc.	0.1%	0.0%	0.0%
84 Nuclear Reactors, Boilers, Machinery Etc.; Parts	0.1%	<0.1%	0.0%

Source: U.S.A. Trade Online

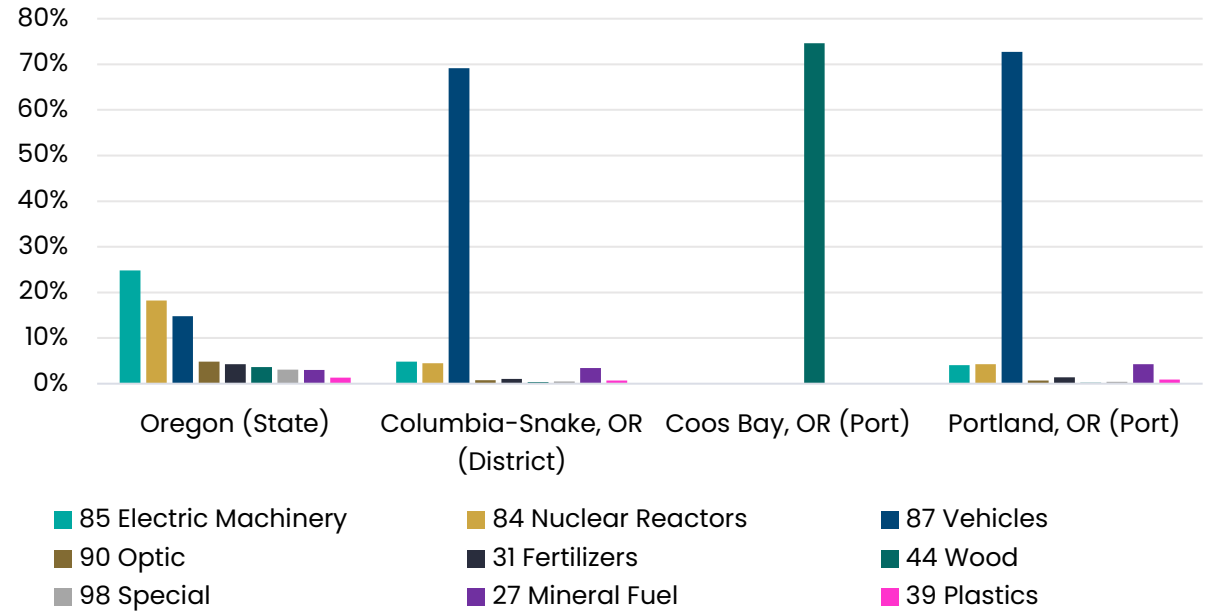
Imports

Imports represent the other side of the coin. They are goods or intermediate products brought into the country to be sold, used, or assembled into final goods. Figure 5.18 shows the top nine import commodity groups at the state level and their share of total import values in each region. In Oregon, commodity group 85: Electric Machinery, Etc., accounts for the largest share of import value, at 24.8%.

The pattern differs in the Columbia–Snake district and the Port of Portland, where commodity group 87: Vehicles accounts for the majority of import value (69.1% and 72.7%, respectively). In contrast, Coos Bay harbor imports almost none of the top nine commodity groups for Oregon, except for 44: Wood & Articles of Wood, which makes up 74.6% of its import value.

The commodity groups shown in Figure 5.18 represent potential opportunities for the Port of Coos Bay, as there is already demand for these goods in Oregon and the Columbia–Snake district. Attracting businesses that use these commodities could be a promising strategy for regional economic development.

Figure 5.18: State of Oregon Commodity Group Shares of Total Import Value, 2022–2024



Source: U.S.A. Trade Online

In addition to the figure above, Table 5.15 shows the undiversified nature of Coos Bay's regional economy, where only three commodity groups are imported:

- 44 Wood & Articles Of Wood; Wood Charcoal
- 25 Salt; Sulfur; Earth & Stone; Lime & Cement Plaster
- 73 Articles Of Iron Or Steel

The table shows the total import value of each commodity group over the past three years, compared to the Port of Portland and the Columbia–Snake district.

Table 5.15: Port of Coos Bay Import Commodity Groups by Value, 2022–2024

Row Labels	Coos Bay, OR (Port)	Portland, OR (Port)	Columbia-Snake, OR (District)
44 Wood And Articles Of Wood; Wood Charcoal	$69,366,466	$64,635,689	$144,947,444
25 Salt; Sulfur; Earth & Stone; Lime & Cement Plaster	$23,622,064	$161,313,205	$246,269,494
73 Articles Of Iron Or Steel	$2,251	$249,334,081	$591,842,583

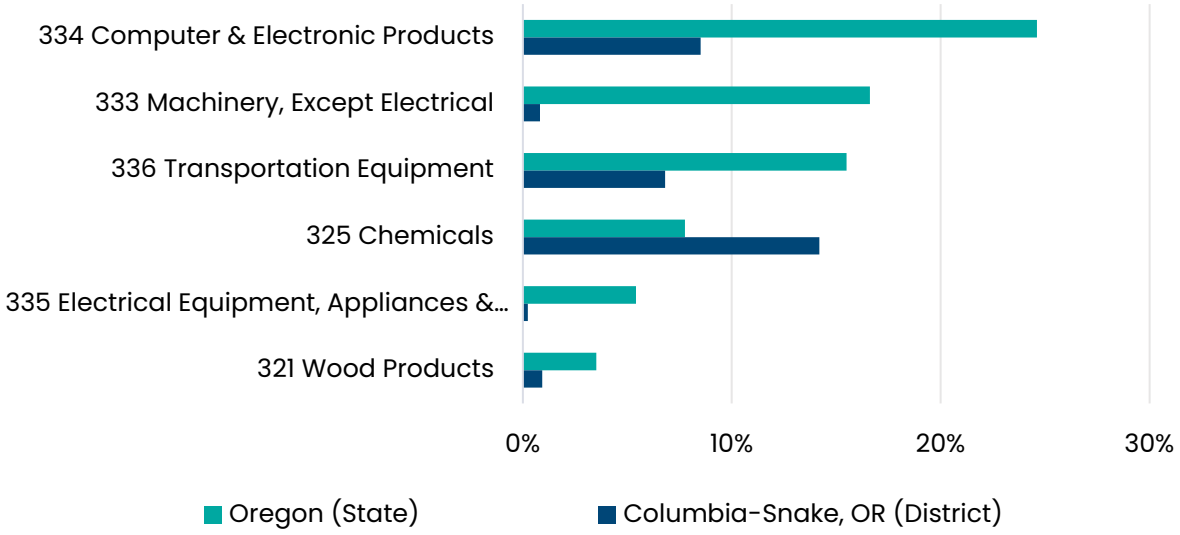
Source: U.S.A. Trade Online

U.S.A. Trade Online also provides export and import values at the state and district levels using North American Industry Classification System (NAICS) codes, rather than HS goods-based codes. NAICS organizes economic activity into a structured hierarchy based on the type of work performed by businesses. Two-digit sectors represent broad

categories of similar economic activity, while three-, four-, five-, and six-digit industries provide progressively more detailed classifications focused on specific business operations.

Figure 5.19 shows the top three-digit industries in Oregon by import value. Businesses in Computer & Electronic Products, Machinery (except Electrical), and Transportation Equipment account for the largest shares of import value in the state. These industries are also represented to varying degrees in the Columbia–Snake district. Each industry represents an opportunity for the Port of Coos Bay to support business and industry recruitment. There is already demand for importing these products into Oregon. Locating businesses closer to where they import products or parts can save time and money and provide a meaningful economic incentive.

Figure 5.19: Three-Digit NAICS Import Industries, % of Total Import Value, 2022–2024



Source: U.S.A. Trade Online

Table 5.16 presents the top 10 industries importing to the state of Oregon by total import value, along with the import value these industries contribute to the Columbia–Snake district. Notably, all of the top 10 industries are within the manufacturing sector (NAICS 31–33).[17] Whether the imports are final goods sold by manufacturers or intermediate parts for assembly, each industry represents an opportunity for the Port of Coos Bay. Manufacturing jobs in the United States are generally well-paying, and the Port has industrial and commercial land that could be leveraged to attract these businesses.

[17] "2022 NAICS," North American Industry Classification System, United States Census Bureau, accessed August 8, 2025, https://www.census.gov/naics/?58967?yearbck=2022.

Table 5.16: Top 10 Three-Digit NAICS Import Industries, Total Import value, 2022–2024

Industry	Oregon (State)	Columbia-Snake, OR (District)
334 Computer & Electronic Products	$18,812,962,533	$4,499,077,423
333 Machinery, Except Electrical	$12,697,129,113	$429,526,352
336 Transportation Equipment	$11,840,229,965	$3,605,213,991
325 Chemicals	$5,926,579,506	$7,510,577,156
335 Electrical Equipment, Appliances & Components	$4,143,324,366	$128,708,146
321 Wood Products	$2,691,271,595	$492,923,417
324 Petroleum & Coal Products	$2,017,022,663	$1,176,371,042
315 Apparel & Accessories	$1,953,915,599	$8,317,838
311 Food & Kindred Products	$1,816,622,602	$589,079,954
326 Plastics & Rubber Products	$1,796,851,112	$32,170,755

Source: U.S.A. Trade Online

Tourism

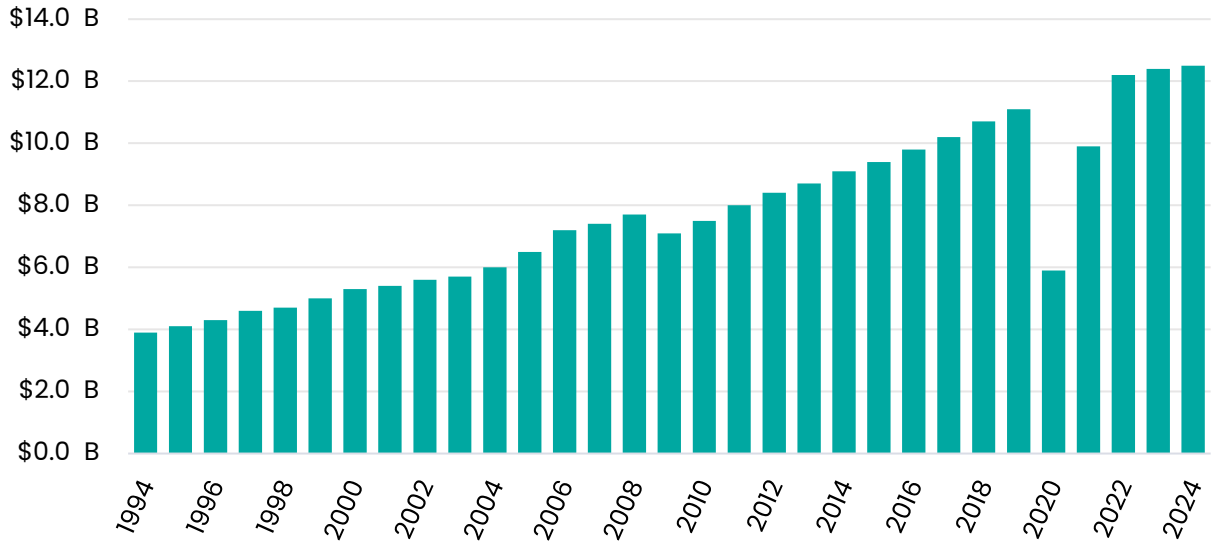
The Coos Bay-North Bend-Charleston area is known to tourists as Oregon's Adventure Coast. Visitors are drawn to a wide range of activities, including ocean-based recreation such as kayaking, scuba diving, and surfing, as well as world-class fishing, crabbing, and clamming. The region is also home to the iconic Oregon Dunes, numerous hiking and biking trails, and a scenic boardwalk. These attractions all highlight the area's extensive outdoor recreation opportunities.[18]

Tourism is a major component of Coos County's economy. The two largest industries by employment (Restaurants & Other Eating Places and Traveler Accommodation) are both tourism related, as shown in Table 5.8.

Tourism has been growing rapidly across Oregon in the past two decades. As shown in Figure 5.20, visitor spending increased from $6.0 billion in 2004 to $12.5 billion in 2024, more than doubling over the period.

[18] Oregon's Adventure Coast, accessed June 30, 2025, https://www.oregonsadventurecoast.com/.

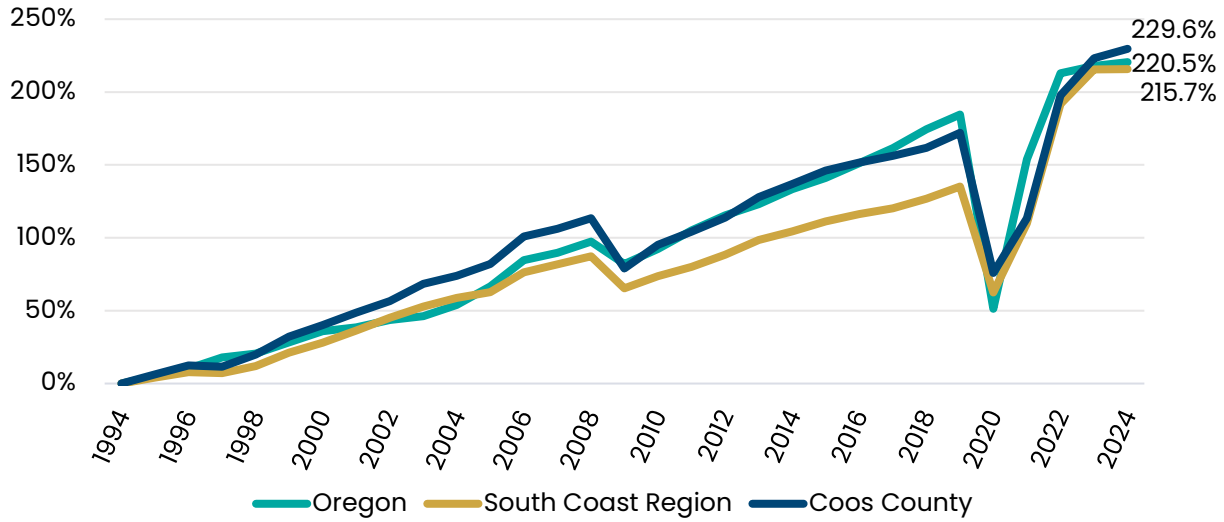
Figure 5.20: Oregon Visitor Spending, 1994–2024



Source: Travel Oregon

The South Coast Region and Coos County have followed similar trends to the state of Oregon in visitor spending growth (Figure 5.21). All three regions have experienced increases of over 200% in the past 30 years, with declines occurring only during the Great Recession in 2008, and the COVID-19 pandemic in 2020.

Figure 5.21: Visitor Spending Cumulative Annual Growth Rate, 1994–2024

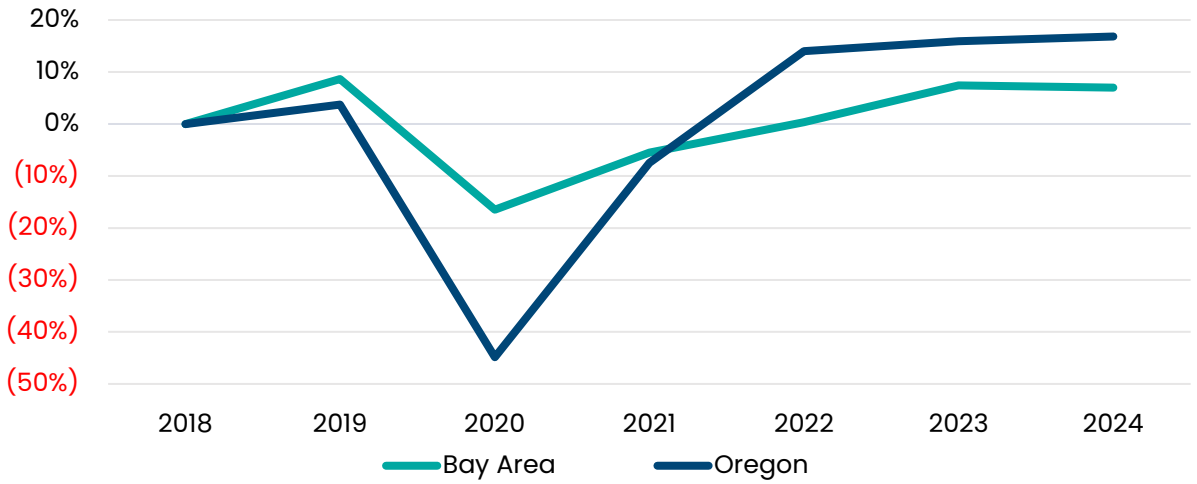


Source: Travel Oregon

In the bay area, the majority of visitor spending (67.4%) is concentrated in Accommodation & Food Services. Compared to the state overall, the Adventure Coast experienced a smaller decline in visitor spending during 2020. However, its recovery has

been slower, and while growth has resumed, it has remained modest in recent years (Figure 5.22).

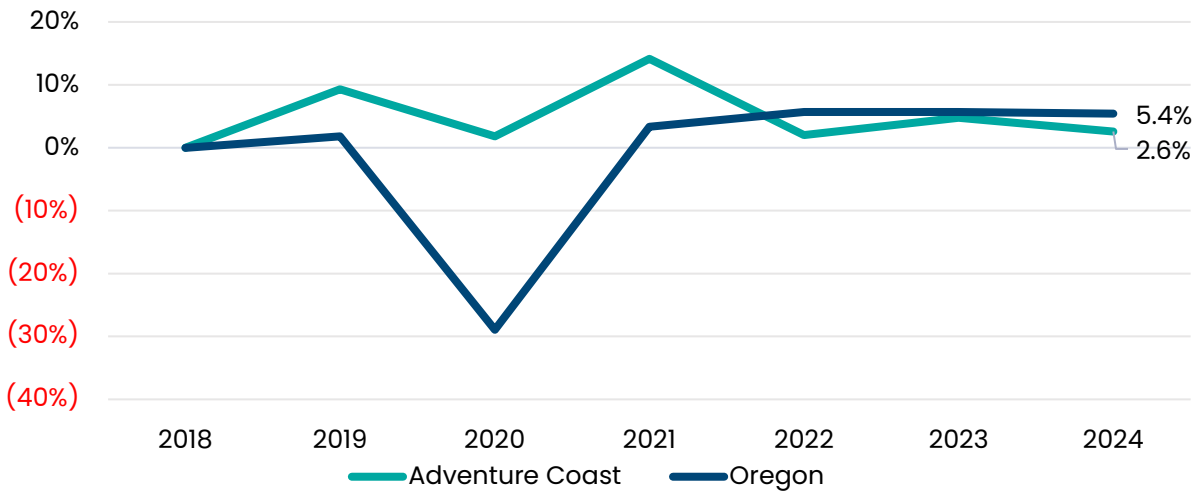
Figure 5.22: Cumulative Annual Growth of Visitor Spending, 2018–2024



Source: Oregon's Adventure Coast, Travel Oregon

Figure 5.23 illustrates recent visitor trends to the Adventure Coast. The number of Person Nights (defined as the total nights spent by visitors in Coos Bay, North Bend, and Charleston) increased from 817.1K in 2018 to 838.2K in 2024. However, the trend has fluctuated, peaking at 932.6K Person Nights in 2021. The data also indicate that the Adventure Coast was relatively insulated from the effects of the COVID-19 pandemic and avoided the significant decline experienced statewide in 2020. This resilience was likely due to the region's abundance of open space and its relative remoteness compared to urban areas.

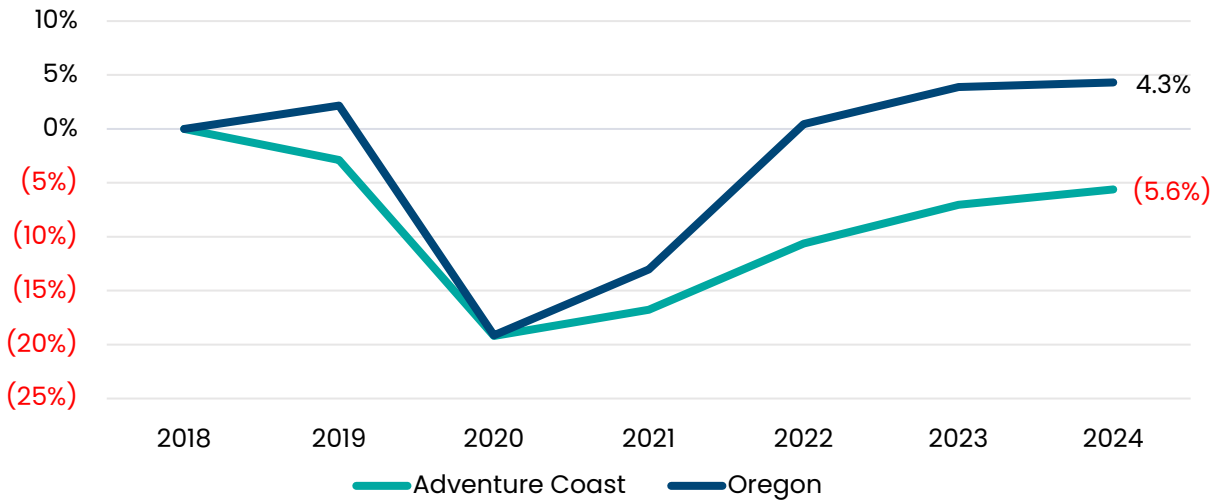
Figure 5.23: Overnight Visitor Volume Cumulative Annual Growth, 2018–2024



Source: Oregon's Adventure Coast, Travel Oregon

Figure 5.24 shows trends in tourism-related employment in the region. Employment declined nearly 20% in 2020 due to COVID-19 restrictions but has since rebounded and approached pre-pandemic levels. In comparison, Oregon's tourism employment also fell by 20% in 2020. However, recovery was faster, with pre-pandemic employment levels fully regained by 2023.

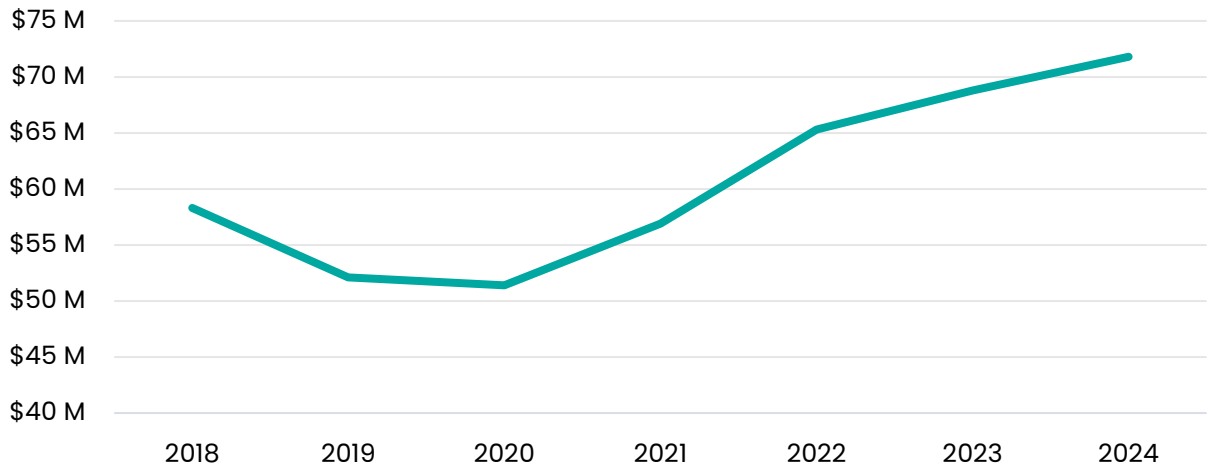
Figure 5.24: Tourism Employment Cumulative Annual Growth Rate, 2018–2024



Source: Oregon's Adventure Coast, Travel Oregon

Since 2020, the employee earnings generated by travel-related spending in the Coos Bay, North Bend, and Charleston region have increased from $51 million to $72 million (Figure 5.25). This represents a 40% increase over four years. This growth has outpaced the increase in tourism-related employment, which rose only 17% between 2020 and 2024.

Figure 5.25: Earnings Generated by Travel Spending, Bay Area Region, 2018–2024



Source: Oregon's Adventure Coast

Travel Oregon conducted an economic impact analysis on the impact of travel in Oregon, providing a useful comparison of Coos County with other coastal counties. Table 5.17 presents the impact of travel spending on Coos County and six other coastal counties. Coos County ranks near the middle in terms of travel spending, travel-related employment and total tax revenue. The four counties at the lower end of the spectrum are within $120 million of each other, while the top four counties span more than $1 billion in travel spending (Coos County reports $348.4 million and Lane County leads at $1,371.6 million). This difference in travel spending is reflected in tax revenue: Lane County generates $20.7 million in local tax revenue from travel, compared with just $4.4 million for Coos County.

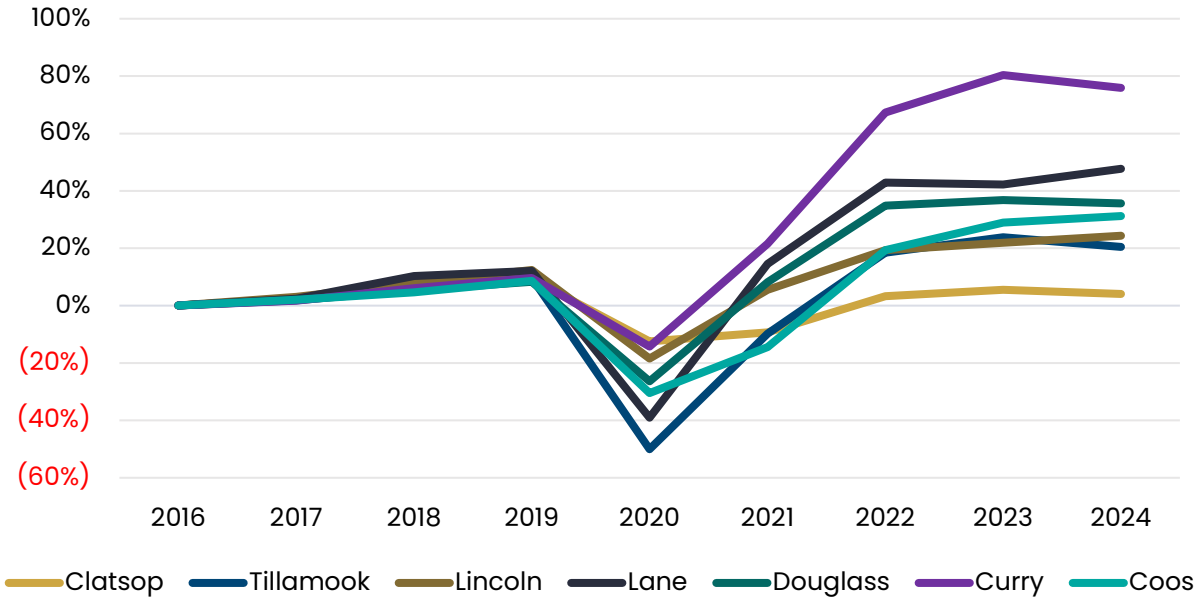
Table 5.17: Economic Impacts of Tourism in Coastal Counties, 2024

County	Total Travel Spending	Employment	Total tax revenue	Local tax revenue	Local Tax Revenue Per Worker
Lane	$1,371.6M	10,470	$52.9M	$20.7M	$1,980
Lincoln	$712.7M	7,850	$41.8M	$19.1M	$2,430
Clatsop	$573.0M	7,270	$32.4M	$12.9M	$1,770
Coos	$348.4M	3,770	$15.4M	$4.4M	$1,170
Douglas	$316.2M	3,590	$11.9M	$2.2M	$610
Tillamook	$273.9M	2,080	$14.3M	$6.9M	$3,320
Curry	$229.3M	2,310	$7.6M	$1.5M	$650

Source: Travel Oregon, The Economic Impact of Travel in Oregon, 2025

Figure 5.26 illustrates travel growth from 2016 to 2024. Using percent change allows for a level comparison across counties, showing how each has grown relative to the others. Coos County again ranks in the middle among coastal counties in terms of travel spending growth since 2016. All counties follow a similar trend, with a sharp decline in 2020 during the COVID-19 pandemic, followed by a relatively quick rebound in subsequent years. Notably, Douglas and Curry counties (neighbors of Coos County with overall lower travel spending) have outpaced Coos County in recovery since 2020.

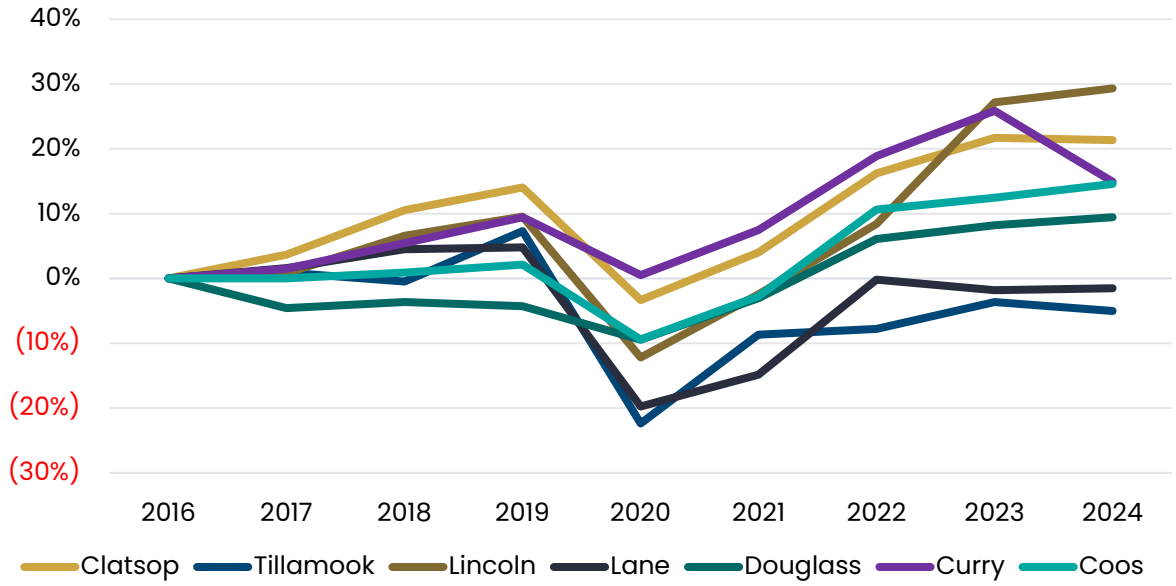
Figure 5.26: Travel Spending Cumulative Annual Growth, 2016–2024



Source: Travel Oregon, The Economic Impact of Travel in Oregon, 2025

Employment, as illustrated in Figure 5.27, has followed a similar trend with all counties experiencing a sharp decline due to the COVID pandemic in 2020, followed by a subsequent recovery. Coos County ranks in the middle (fourth) among these counties with Lincoln County showing the fastest growth, followed by Clatsop and Curry counties.

Figure 5.27: Employment Cumulative Annual Growth, 2016–2024



Source: Travel Oregon, The Economic Impact of Travel in Oregon, 2025

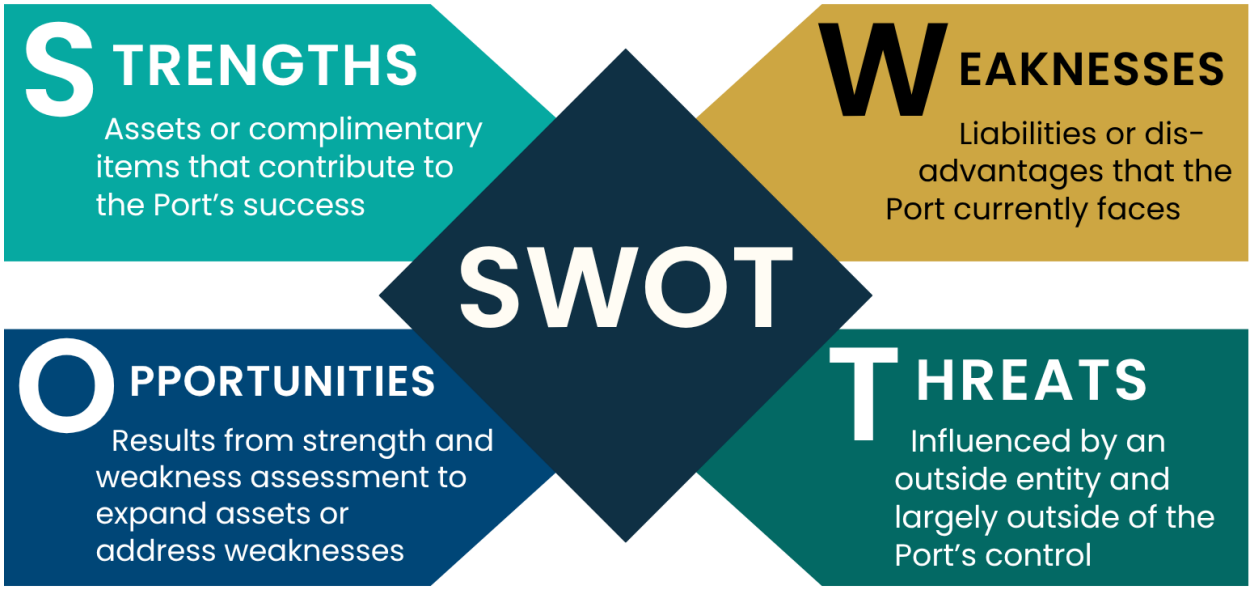
6. SWOT Analysis

A strengths, weaknesses, opportunities, and threats (SWOT) analysis is a strategic planning tool which helps businesses, organizations, and other entities understand their unique competitive advantages within the marketplace. The project team, along with the guidance of the Port of Coos Bay Commissioners, determined the Port's current situation and identified meaningful SWOT components.

A few caveats are necessary as an introduction to the SWOT. Firstly, the Port exists in a socioeconomic context that includes Coos Bay, North Bend, Coos County, and various other communities in the bay area. Although this plan is focused on the Port particularly, the Port is affected by certain economic factors that are outside of its control. Hence, the SWOT includes some issues that are more descriptive of Coos Bay or Coos County than the Port itself.

As a leading economic development organization for the region, the Port can influence many of these issues. But some are clearly outside of its purview (e.g., road and street improvements). Secondly, please note that it is possible for the same or similar issue to appear within more than one SWOT category, if different dimensions of that issue qualify according to the SWOT criteria.

Our project team reviewed all aspects of the Port, including financial operations, real property assets, regional collaborators, the local environment, and more. We honed the list below throughout the course of the project as we gained additional information from Port staff, Port Commissioners, local stakeholders, and our community survey. The following are definitions of the SWOT components:



STRENGTHS

- One of the largest deep-draft coastal harbors on the West Coast (deepest between San Francisco Bay and the Puget Sound)
- One of only two Oregon International Ports
- New Port leadership with a reputation for transparency
- A diverse board with deep ties to the community
- Charleston Marina and Shipyard
- Existence of commercial fishing fleet, seafood processing industry, and ice plant operations
- Ownership and operation of the Coos Bay Rail Line (CBRL)
- Ownership of several developable properties
- Outdoor/recreational amenities of the region
- Proximity to the Southwest Oregon Regional Airport
- Support from State and National leaders
- Proximity to Bandon Dunes and Pacific Dunes golf courses
- Unique local fishing, crabbing, shrimping, and clamming opportunities
- Recently installed ice plant at Charleston Marina
- Proximity to Southwest Oregon Community College (SWOCC)
- Collaborative regional organizations in economic development and housing
- Presence of local healthcare facilities (North Bend Medical Center, Bay Area Hospital, and CTCLUSI Tribal Clinic)
- Superior quality of life in the Coos Bay–North Bend area
- Environmental education and preservation assets: Oregon Institute of Marine Biology, South Slough National Estuarine Research Reserve, and the Charleston Marine Life Center
- Long-term business tenants in Charleston and the Upper Bay
- Engaged community supporting Port operations and success
- Healthy estuary and siltation in the channel due to Watershed Association engagement
- Federal improvements to the North Jetty

WEAKNESSES

- Financial burden of aging infrastructure and operating costs of the CBRL
- Limited staff levels and budget
- Limited awareness of distinctions between project-specific funding and general funds
- Lack of available funding for the region related to maritime activities
- Relative geographic remoteness from I-5 corridor
- Region's reliance on retiree and tourist spending
- Age of infrastructure throughout all assets
- Challenging financial conditions of Coos County
- Limited opportunities for higher-paying jobs
- Limited availability of skilled trades workers
- Challenging housing market for middle- and low-income residents
- Residual perception of the Port's prior lack of collaboration and communication
- Historically, limited collaboration with other regional organizations
- Declining railroad business
- Relatively challenging regulatory environment within the state of Oregon
- Lack of public understanding of costs to maintain port infrastructure
- Appointment of Port Commissioners from the Governor, rather than local voters
- Relatively low amenities at existing Charleston RV park
- Seasonal capacity challenges due to responsibility for operating the state of Oregon's dredge
- Focus on large-scale initiatives in recent years has diverted attention from existing properties
- Lasting taste of Jordan Cove failure

OPPORTUNITIES

- Potential development of deep-water multi-modal facility (i.e., Pacific Coast Internodal Port or PCIP)
- Receipt of nearly $150 million in Federal and State grants in association with PCIP development
- 61,000+ acres of offshore wind area (WEAs) in the federal government's Coos Bay WEA
- Room for growth in partnership with regional partners (such as City of Coos Bay, City of North Bend, Coquille Indian Tribe, and Confederated Tribes of Coos, Lower Umpqua, and Siuslaw Indians [CTCLUSI])
- Potential to increase tourism spending to align with other Oregon coastal communities
- Opportunity for advocacy and increased marketing of commercial fishing fleet impact
- Potential for re-envisioned use of southern railroad corridor to Coquille
- Opportunity for value-added agriculture based on existing natural resources
- Potential legislative funding for the Port's international trade activities aligned with State goals
- Opportunity for Shipyard revitalization and reinvestment
- Redevelopment-ready industrial property in Terminal One
- Ability to address local housing shortages through potential development of Eastside residential property
- The potential for business recruitment at the commercial and retail storefront at the Charleston Marina
- Ownership of approximately 1,000 acres of land on the North Spit
- Vacant residential and industrial property in Eastside (approximately 320 acres)
- Potential for mixed-use redevelopment of existing buildings at Charleston Marina (commercial, retail, and residential)

THREATS

- Potential negative effect of tariffs on overseas trade of seafood and wood products
- Regulatory environment in Oregon results in difficulty developing Port-owned properties
- Narrowing of commodities exported from the Port over time to primarily wood-based products
- Previous lack of planning for maintenance and development of port infrastructure
- Larger economic development projects present risks of pollution in the bay, impacting water quality for fisheries
- Potential difficulty recruiting private businesses/industries due to regulatory environment
- Potential for State and Federal funding priorities to change over time
- Existing industry resistant to new industry entering the community
- Potential human and economic effects of Cascadia Subduction Zone (CSZ) event over the next several decades
- Resistance to change by some citizen groups
- Some general organized advocacy against Port operations, specifically regarding environmental impact and taxation
- Port staff and financial resources spread too thin to meet the needs of all Port-owned properties
- Expectation to deliver to many groups on a limited budget
- Ongoing dredging need for port infrastructure
- Over-reliance on the tourism industry could result in further wage decreases and increased housing challenges
- Aging population and limited in-migration of full-time residents
- Potential compromise of CBRL due to age and condition of Swing Span Bridge
- Potential for deterioration to critical marine habitats (such as eelgrass)
- Risk that large-scale commercial development could compromise strength of commercial and recreational fishing industries
- Increasing energy costs and sometimes limited energy availability
- Increasing politicization and polarization of all issues

7. Policy Context

Port-led, local, and regional planning efforts inform the policy context in which the Port of Coos Bay operates. This section reviews potential environmental issues, statewide planning goals, and other local and regional plans relevant to the Port. These plans provide insight into regional goals and objectives. They may reveal opportunities for the Port to further support strategic partners and regional leaders in supporting economic development and community sustainability.

Threshold Statement

The Oregon International Port of Coos Bay 2025 Strategic Plan has been prepared with funding from OECDD and follows the template provided by OECDD. The Port is committed to adhering to its governance policies and this Strategic Plan. As part of the annual budgeting process, the Port will update its five-year capital plan, along with its goals and objectives, each year. Sitting Commissioners have completed board training and have agreed on procedures for handling conflict-of-interest issues, as well as to follow best practices and fiduciary responsibilities as defined above. The Strategic Plan is designed to be flexible and allows for unanticipated business opportunities that support the Port's economic development or revenue enhancement goals.

Statewide Port Strategic Plan Recommendations

In June 2010, the Oregon State Legislature released a background brief on Oregon Ports.[19] This brief is an important document in State planning efforts regarding the 23 public port districts in Oregon. Specifically, the document established how the state should engage with its ports, including coordinated investment, planning, and infrastructure support. The brief also identified core capabilities and consistent challenges facing ports, such as financing constraints and infrastructure gaps.

The role of Oregon's public ports was also addressed. Most notably, the port districts are to play an active role in economic development by creating and maintaining industrial and commercial infrastructure in surrounding areas, owning and developing industrial and commercial parks, and attracting jobs and private investment. This third point is especially beneficial to rural areas where industrial infrastructure might not otherwise be developed. The brief also noted that several Oregon ports operate air terminals and railroads in addition to marine facilities, the latter being an important area of operation for the Port of Coos Bay.

[19] Oregon State Legislature, *Background Brief on Oregon Ports* (Salem, Oregon: Oregon State Legislature, June 2010), https://www.oregonlegislature.gov/lpro/Publications/2010OregonPorts.pdf.

Ports are also a primary link in connecting Oregon seafood products to domestic and international markets. Tourism is another industry noted in the brief in which ports play an important role, as they support recreational fishing and leisure boating. The areas identified in the 2010 legislative background brief are all areas that our SBP will pay close attention to in determining both short-term and long-term goals for the Port.

Environmental Issues

The Port of Coos Bay is committed to being a responsible environmental steward through the sustainable economic development of the region. Port activities have both direct and indirect effects on the environment, and Port staff are committed to minimizing their impact while educating and empowering employees to make more environmentally responsible life choices.

Port staff make every effort to adhere to laws and regulations pertaining to Port operations and the community. They aim to exceed required levels of compliance wherever feasible. This strategy has begun to take shape through environmentally preferable purchasing decisions and company-wide recycling programs. As a result, environmental responsibility has become an integral part of the Port's operating philosophy.

Environmental Goals and Policy

The Port's goals include managing operations and facilities in an environmentally responsible manner. The Board adopted green policies in 2009, and the Port maintains both "Clean Marina" and "Clean Boatyard" certifications from the Oregon State Marine Board (OSMB). It also implements the OSMB's best environmental practices at the Charleston Marina and Boatyard. The following goals, policies, and strategies (originally set in the 2015 SBP) support the Port's continued commitment to sound environmental stewardship.

Goal: Continue to operate Port facilities consistent with established best management practices, including Clean Marina and Clean Boatyard programs.

Policy 1: Review and, as necessary, update green policies and best management practices annually to ensure compliance with current environmental regulations and to balance economic development opportunities with regional sustainability.

- Work with local representatives to address environmental concerns and engage community input as needed for special projects.
- Share resources, funds, and opportunities with local and regional partners, as appropriate, to achieve common environmental goals and projects.

Policy 2: Maintain Clean Marina and Clean Boatyard certifications through OSMB.

Environmental Priorities

The Port has identified six environmental priorities: waste management, water conservation, air quality, energy efficiency, purchasing supplies, and community engagement.

Coos Bay Estuary Management Plan

Coos Bay, North Bend, and Coos County have created and updated the Coos Bay Estuary Management Plan (CBEMP) in compliance with Oregon's Statewide Planning Goal 16. The plan strives to balance natural resource, conservation, and development needs within the Coos Bay Estuary and designates appropriate areas for various existing and future uses. It includes maps and guidance to identify the management unit designation for each parcel of land, along with guidelines and policies for development within each designated unit in and around the estuary.

The management unit classifications identified in the CBEMP are:

- Natural Aquatic (NA)
- Conservation Aquatic (CA)
- Development Aquatic (DA)
- Natural Shorelands (NS)
- Conservation Shorelands (CS)
- Rural Shorelands (RS)
- Development Shorelands (D)
- Water-Dependent Development Shorelands (WD)
- Urban Development (UD)
- Urban Water-Dependent (UW)

Statewide Planning Goals

The Port's Strategic Business Plan (SBP) has been developed to align with the statewide planning goals as required by the state. The following goals are most relevant to the Port's planning efforts.

Statewide Planning Goal 9 – Economic Development

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

The State of Oregon requires local jurisdictions to maintain a 20-year supply of employment lands suitable to meet the needs of existing businesses and industries likely to relocate to the area during the planning horizon. The Coos-Curry-Douglas Business Development Corporation (CCD) is the federally recognized and funded economic development district for the three-county region.

In June 2022, CCD completed an Economic Recovery Initiative (ERI) resiliency plan for the region. The plan identified three main gaps in the regional entrepreneurial system: access to communication networks, financial resource identification, and business acumen technical training and support. While the Port does not directly engage with these aspects of economic development, it partners with organizations that do. Through current and future partnerships, the Port may help close these gaps in the regional economy.

More recently, CCD prepared a comprehensive economic development strategy (CEDS) for 2024–2029. The CEDS action plan identifies four main goals:

- Support efforts to improve the regional economy through partnerships and regional collaboration
- Reduce barriers and obstacles to economic development and living wage job growth
- Support infrastructure assistance to communities
- Maintain and promote vibrant, livable communities

The Port of Coos Bay actively participates in the first goal by improving its own partnerships and regional collaboration with organizations in Coos County. The Port is also working to promote living wage job growth through its ownership of industrial and commercial land. Infrastructure remains a critical component of Port operations, including the Coos Bay Rail Line and the Charleston Marina.

Through this strategic planning process, PC identified further competitive advantages that distinguish the Port of Coos Bay from other ports and position it to grow and support regional economic development. Specific advantages are detailed in the SWOT analysis and specific projects supporting Goal 9 are described in the Capital Improvements Plan section.

Statewide Planning Goal 12 – Transportation

To provide and encourage a safe, convenient, and economic transportation system.

The State of Oregon requires all cities and counties to develop a Transportation System Plan (TSP) to support this goal. The cities of Coos Bay and North Bend, along with Coos County, each maintain a TSP. These plans include the Port-owned and operated Coos Bay Rail Line and the Port's maritime activities. The Port handles 1.5 million tons of cargo annually through the Coos Bay harbor. Both the Charleston Marina and the Coos Bay Rail Line are integral components of the Port District's transportation system. Continued maintenance and improvements to these facilities will be critical for sustaining a safe, efficient, and economically viable transportation system in the region.

Statewide Planning Goal 17 – Water Dependent Use

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

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

This SBP identifies facility and infrastructure improvements related to water-dependent uses. The Port manages and maintains these uses in Charleston, the North Spit, the East Bay, and the Upper Bay. The identified improvements are discussed in the Capital Improvements Plan. All proposed and implemented improvements must demonstrate compliance with Goal 17 policies.

Other Local & Regional Plans

City of Coos Bay Comprehensive Plan

The City of Coos Bay's Comprehensive Plan was originally developed for 1987–2000 and has been updated multiple times, most recently in April 2025. The Comprehensive Plan addresses the history of Coos Bay, the physical environment, ecology, cultural environment, and land use, along with a discussion of key problems, planning issues, and goals. It identifies seven target industries for economic development:

- Water-dependent industries and enterprises
- Industries that do not require access to Interstate 5
- Businesses relating to outdoor recreation
- Wood products and commercial fishing industries
- Solar and metal fabrication
- Technology industries reliant on proximity to fiber-optic infrastructure
- Tourism

This SBP examines the current industry composition of Coos Bay in the Economic Profile and focuses specifically on Trade and Tourism within the same section.

While wood products and water-dependent industries have declined over the past few decades, tourism is highlighted in the Comprehensive Plan as a key opportunity. The plan acknowledges a regional shift in perception, from one centered on industry to one that values recreational and tourism-related assets.

Parks, Recreation, and Cultural Facilities Plan (2023–2033)

The Facilities Plan details existing paths (including the Coos Bay Boardwalk, John Topits Park Trail, Sawmill and Tribal Trail, and Mingus Park Trail) as well as historical and cultural facilities such as the Preway, Firefighters Memorial, Coos Art Museum, Egyptian Theater, Marshfield Sun Printing Museum, and Coos Bay Library. Community feedback emphasizes renovating and maintaining existing facilities, addressing public safety concerns (e.g., illegal camping and vandalism), supporting trail connectivity, and expanding the Boardwalk. The Facilities Plan's goals are to enhance existing facilities, develop citywide branding, pursue sustainable funding sources, and build or strengthen partnerships for implementation.

Some facilities, such as the Coos Bay Boardwalk, are or could be supported by the Port or through use of Port-owned lands. This SBP also considers community feedback on potential developments the Port could undertake to support these facilities.

Coos Bay Rail Line 2014 Economic Impact Study

The Coos Bay Rail Line's (CBRL's) first full year under Port ownership was 2012, and many economic benefits have resulted since then. CBR customers saved $2.2 million in transportation costs in 2014.

Construction alone has had a considerable economic impact on the area. Construction investments totaled $3.1 million in 2014, following substantial investments in previous years, and generated 24 jobs that year.

Operations in 2014 supported 14 direct CBRL jobs with $838,000 in compensation, while purchases from vendors grew to $2.7 million. Total employment supported by CBRL was 40 jobs, with an additional 2.1 jobs from direct or induced effects. The rail line generated $337,000 in state and local taxes (across tri-counties) and $456,000 statewide. It also led to savings in road maintenance costs and reduced collision-related expenses.

The Port raised over $31 million for repairs to CBRL infrastructure. Economic benefits include support for local industry through lower transportation costs, with the Southwest region of the United States being the largest market for cargo.

Understanding the Impacts of Port assets and operations such as the CBRL is crucial when implementing an SBP. There are many, sometimes subtle, links between Port assets and their effects on the local economy. To establish this understanding, PC conducted a workshop with the commissioners to map the links and contingencies between port assets ensuring that recommended actions planned for these linkages.

CCD CEDS 2024–2029

Coos, Curry, and Douglas Counties all have aging populations, most likely due to a lack of family-wage jobs in the area. The Comprehensive Economic Development Strategy (CEDS) identifies increasing the high-technology sector in the study area as a key focus in the state, as the number of such jobs is much lower compared with the rest of Oregon.

The CEDS's SWOT analysis highlights the region's strengths as natural amenities, emerging tourism, community pride, transportation connections, and the natural shipping harbor. Weaknesses include a lack of affordable housing, inadequate infrastructure, poor workforce development, lack of collaboration, and low wages. Opportunities involve increasing affordable housing, attracting and retaining the workforce, improving infrastructure, promoting tourism, and increasing emergency planning awareness. Threats include environmental constraints, rural infrastructure challenges, workforce challenges, housing issues, and limited capital. Housing is identified as the largest weakness. The SWOT in chapter 6 of this SBP identifies many of these same elements as well as more that relate directly to the Port.

The action plan includes goals to improve the regional economy through partnerships and collaboration, reduce barriers to economic development and living-wage job growth, support infrastructure assistance to communities, and maintain and promote vibrant, livable communities.

Economic Benefits and Needs of Oregon Public Ports

This document highlights the significant economic role of Oregon's public ports. The Ports of Portland, Coos Bay, and Astoria function as gateways in Oregon. While only the Port of Portland and the Port of Coos Bay are Oregon's international ports, the Port of Astoria is still an important gateway to the Columbia River system. Of the gateway ports, the Port of Portland is the largest, with 84% of Oregon's waterborne trade passing through it in 2020.

Overall, Oregon port activities support over 106,799 jobs, $7.1 billion in labor income, $10 billion in value-added impacts, and $19 billion in total economic output, with the Port of Portland accounting for the majority of these jobs. Ports contribute 5.6% of Oregon's employment (1 in 20 jobs), and including indirect/induced effects, support 220,000 jobs (1 in 10 jobs). Most ports (73%) reported growth over the past five years, with the Port of Coos Bay experiencing substantial growth.

The largest needs for ports are planned capital improvements, new buildings and facilities, and wastewater systems. The Port of Coos Bay directly supports 110 jobs, with a

total of 230 jobs including indirect and induced effects.[20] Wages at ports are generally higher than the overall state average.

Oregon Freight Plan

The vision of the Oregon Freight Plan is to achieve a reliable, safe, and efficient freight system by 2045 that enhances quality of life and encourages business growth. Oregon is estimated to be the 10th to 15th most trade-dependent state, with freight volume predicted to grow 64% and freight value 92% from 2017 to 2050. Freight is a very important aspect of the Oregon economy. This SBP analyzes the impacts of trade in the Port of Coos Bay region in the Trade section.

Different transportation regions are identified by Area Commissions on Transportation (ACTs). Coos County is included in the South West ACT along with Douglas and Curry counties. Table 7.1 below shows what types of goods will be exported (production shares by commodity group) along with forecasted changes in the South West ACT through 2040. Table 7.2 shows what types of goods were imported to the area in 2019 and the forecasted changes for 2040.

Table 7.1: South West Area Commission on Transportation Production Shares by Commodity Group, 2019–2040 by Value

Commodity Group	Commodity Share 2019	20-Year CAGR	Commodity Share 2040
Food or Kindred Products	28.0%	1.2%	26.0%
Other/Miscellaneous	25.0%	1.7%	26.0%
Forest or Wood Products	17.0%	(0.5%)	11.0%
Petroleum, Coal, Chemicals	13.0%	3.4%	19.0%
Machinery, Instruments, Transportation Equipment, Metals	13.0%	2.3%	15.0%
Pulp or Paper Products	2.0%	0.1%	1.0%
Clay, Minerals, Stone	3.0%	1.2%	2.0%
Total	**100.0%**	**1.4%**	**100.0%**

Source: Oregon Freight Plan 2023

[20] Direct effects are immediate economy activity, such as workers employed and wages paid by the organization. Indirect effects are additional workers and wages supported by business-to-business activity. Induced effects originate from changes in household spending (or spending multipliers) impacting economic output. Sources include "industry located on Port property" which may explain higher than expected direct employment estimates.

Table 7.2: South West Area Commission on Transportation Consumption Shares by Commodity Group, 2019–2040 by Value

Commodity Group	Commodity Share 2019	20-Year CAGR	Commodity Share 2040
Machinery, Instruments, Transportation Equipment, Metals	28.0%	2.0%	28.0%
Other/Miscellaneous	25.0%	3.2%	32.0%
Food or Kindred Products	16.0%	1.6%	15.0%
Petroleum, Coal, Chemicals	16.0%	1.8%	15.0%
Forest or Wood Products	8.0%	0.9%	7.0%
Clay, Minerals, Stone	4.0%	(1.9%)	2.0%
Pulp or Paper Products	2.0%	(1.2%)	1.0%
Total	**100.0%**	**1.7%**	**100.0%**

Source: Oregon Freight Plan 2023

City of Coos Bay Housing Needs Analysis (2020)

This analysis found that future housing needs for the next 20 years can be appropriately met using existing city land and current zoning designations. The Urban Growth Boundary (UGB) does not need to be changed, nor is there a need for increased density of housing on residential land. While this housing needs analysis found that the UGB did not need to be expanded for residential reasons, there is a current initiative to expand the current boundary.[21] The initiative may be tied to the need for developable industrial land if there is an insufficient amount available.

Demand for homeownership is outpacing supply, and future housing demand is expected to remain high, particularly at mid- and high-income levels. A total of 604 new rental and ownership units will be needed by 2040 to meet this demand. The City of Coos Bay approved a new manufactured home development in 2020, resulting in a projected 61.2% of new housing being manufactured homes, 28% single-family homes, and 11% duplex through four-plex units. These developments are anticipated to require only 79.2 acres of new residential land out of the 480 acres available.

This Housing Needs Analysis is relevant to our SBP, as residential development is a potential option for some Port-owned land in the bay area. Residential development is also considered a driver of economic development.

[21] "City & County Collaborate on UGB – Mayor's Message," Joe Benetti, City of Coos Bay News, May 30, 2025, https://www.coosbayor.gov/Home/Components/News/News/1788/222.

Charleston Harbor Master Plan Update

This Master Plan provides insight into the uses of Charleston Harbor and the value it brings to the Port of Coos Bay and the surrounding region. Understanding these uses, along with the Port's other assets and operations, helps contextualize the Port's needs in this SBP.

The Charleston Harbor has three main operation areas: the Marina, Shipyard, and RV Park. The Marina provides services and infrastructure annually to over 200 locally based commercial and recreational fishing vessels, as well as hundreds of visiting vessels. About 25% of total harvest value from Oregon's ocean fisheries comes from Charleston.

The Shipyard offers storage for equipment and vessels and hosts three service providers that perform year-round repair, maintenance, and construction for commercial fishing fleets.

The Charleston Marina RV Park has space for 100 RVs, plus three family-sized yurts and two tent sites, along with numerous visitor amenities.