



# Comprehensive Economic Development Strategies

**Lewis County CEDS**

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Comprehensive Economic Development Strategic Plan 2025-2027

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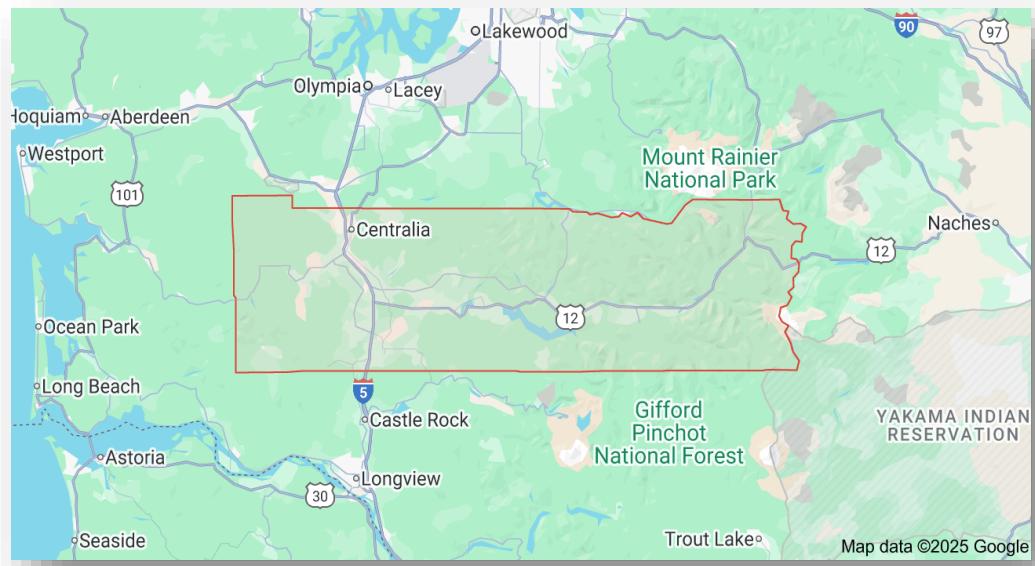
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## Summary Background

### Lewis County

A distinguished region sits among the dense forestlands and scenic mountain ranges of Southwest Washington. The halfway point between Portland and Seattle, the Lewis County area is characterized by its natural beauty, rich history, independent spirit, and rural heritage. The county is the namesake of the celebrated explorer, Meriwether Lewis, known for his expeditions and discoveries across the Pacific Northwest.



The residents who settled the area some 200 years later were beneficiaries of Lewis's adventurous nature, optimism, and courage. They built communities that reflected the same pioneering spirit and left a legacy of hard work, determination, and community-mindedness.

Throughout its history, Lewis County has thrived economically. Its abundant natural resources have brought prosperity to local residents and benefitted the world for over a century. Its forest products industry is one of the largest in the Northwest. The intrigue of its recreational opportunities attracts outdoor enthusiasts from east to west. Its location along the Interstate 5 corridor, equidistant to two large, rapidly growing cities, gives it a distinct advantage in logistics, manufacturing, and telecommunications. Local Centralia College is the longest continuously running community college in Washington State and is unrivaled in terms of performance and support to the community.

Like many communities, Lewis County has not been without its share of challenges. TransAlta, the only remaining coal-fired power plant in the Washington State, has been on a mandated closure following an agreement with state authorities to transition away from coal. TransAlta is one of the largest employers and contributors to the community and has been forced to lay off workers and reduce its footprint in the area. Portions of the county are also located on a floodplain, which is subject to occasional catastrophic flooding. In addition, the county's eastern portions are isolated from highway and rail access and lack adequate infrastructure in some areas. The region also experiences higher than average unemployment, a lack of skilled labor, and below average wages.

A new dawn is rising on Lewis County, however, and it is driven by the community's forward-thinking people, a renewed focus on community-building, rapid growth in the surrounding regions, and a changing economic landscape. The broader Western Washington region is experiencing unprecedented expansion and economic activity, and Lewis County is poised to take advantage of it. Industry innovations and advancements are occurring in the county's backyard—innovations that will impact lifestyles, communities, and economies on a global level. New opportunities for growth and change are emerging every day.

The following strategic plan is written in the same spirit of optimism as Meriwether Lewis, in the hope that it will guide Lewis County boldly into the future.

We would like to thank our Partners; The Port of Chehalis, Northwest Agriculture Business Center and Discover Lewis County, that made this project possible.



The CEDS document was posted for public comment to the Lewis County and Economic Alliance of Lewis County websites on 9-29-25. All comments should be directed to the Economic Alliance. Point of Contact will be Todd Chaput. Email comments to [todd@lewiscountyalliance.org](mailto:todd@lewiscountyalliance.org). Comment period lasts for 30 days.

**Forests**

Working Forest:

708,870

Restricted Forest:

665,777

Total Forest:

1,374,647

## Key Industries

### Wood Products

Lewis County is located in the wood basket and is one of the largest timber producing counties in the Northwest. Our largest wood manufacturers are Cascade Hardwoods, Northwest Hardwoods, and Hardel Mutual Plywood. Our wood products include Douglas fir, hemlock, maple, and alder.

### Food Processing

Lewis County is home to major food processing companies as well as niche agricultural farms. National Frozen Foods pioneered the process to freeze and store vegetables in the 1920s. Today they run a highly automated system using robotics to process and package food. Callisons Inc. is the largest mint oil processor in the world with products in oral care, confectionaries, and gum. Darigold produces dry milks and supplies them throughout the world.

### Glass, Plastics, Chemicals

Two major highways and four major railroads make us a competitive location for manufacturing. We have companies that produce float glass, tempered glass (for solar panels), plastic piping, netting, and specialized composites. In addition, Lewis County is home to companies that produce chemicals for power plant operations as well as companies that recycle carbon fiber and soda ash.

### Telecommunications

We have a major north-south fiber link with multiple fiber lines that are available for access on a wholesale level. We are also served by various ISP's and wireless carriers. Toledo Tel is a local ISP that offers phone and data services. Lewis County is ideal for technology startups. We have a number of computer and technology based companies that have found their location to be one they operate competitively. Lewis County PUD recently secured grant funding to deploy broadband through the county using an open-access model.

### Healthcare

Providence Centralia Hospital is a non-profit organization which employs 800 people. Providences' teams are trained in lymphedema therapy, neurological therapy, occupational therapy, pediatric therapy, speech therapy, wound care, oncology, and chemotherapy. In addition, their diagnostic imaging services include: breast specific gamma imaging, bone density screenings, CT-Scans, X-Rays, digital mammograms, digital radiology, fluoroscopy, MRIs, nuclear medical exams, and ultrasound. Other major providers include Arbor Health and Valley View Health Center.

## Agriculture

Agriculture is the original Lewis County industry. It's essential to the rural areas of our community. But it also plays a central role in making other industries go: from value added manufacturing, to transportation, logistics, hospitality and food services and even hospitals, assisted living facilities and schools. The hyper-local ag industry also plays an invaluable role in bringing community together, at farmers' markets, food fairs, food trucks and elsewhere. Ag operators face myriad challenges, from ever-changing markets to market access and even tariffs.

## Tourism and Recreation

The Tourism and Recreation Industry Cluster is home to almost innumerable boundary-spanner sectors in Lewis County. Individual businesses are interdependent on one another for success. Workers in one subsector often transfer among the other subsectors. The cluster is an essential component of our community that weaves from urban to rural area like a string of pearls. While Lewis has long been a nature-based destination, our increasing portfolio of sports, cultural and urban experience attractions reflect our growing role as a destination community – for visitors and residents alike. To sustain and capitalize on these trends, our community will need to expand our portfolio of opportunities – not only to grow taxable sales revenue, but to attract and grow our population centers and employment base.

*Population by Age*

Under 18: 18,159

25 - 34: 10,112

35 - 44: 10,250

55 - 64: 11,892

75 - Older: 6,987

Source: Jobseq

## Demographics & Labor Force

### Population – 2025

Name	Population Estimate
Lewis County	83,925
Centralia	19,061
Chehalis	7,717
Unincorporated	45,475 (as of 2023)

Source: [US Census Bureau](#); Jobseq

### Commuting Patterns (2022)

Name	Number	Value
Reside & Work in County	13,955	37.3%
Out-Commute from County	23,475	62.7%
Lewis Workers Employed in Thurston County	4,519	12.0%
Lewis Workers Employed in Other Counties	18,956	88.0%
Unemployed & Unemployment Rate (2025)	1,811	5.6%

Source: [US Census Bureau](#) On-The-Map [Employment Security Department](#)

### Average Annual Wages by Select Industries

Name	Wage	Jobs
Health Care and Social Assistance	\$66,502	4,696
Manufacturing	\$70,666	3,339
Transportation & Warehousing	\$66,885	1,933
Retail Trade	\$44,904	3,753
Educational Services	\$58,688	2,195
Information Technology & Telecommunications	\$70,835	235
<b>Total</b>		29,550

Source: Jobseq

*Tax Facts*

No corporate income tax

No personal income tax

No inventory tax

No unitary tax

No impact fees

No local B&O tax

No tax on interest, dividends, or capital gains

## Taxation & Utilities

### Major Local & State Taxes

Name	Tax
<b>Sales Tax (Unincorporated areas)</b>	8.2%
<b>Sales Tax (Incorporated areas)</b>	8.4%
<b>WA B&amp;O Tax (Manufacturers)</b>	\$0.00484
<b>Property Tax Chehalis (Industrial areas)</b>	\$11.36

Source: Department of Revenue - [Sales](#), [B&O](#); Lewis County Assessor

### Incentives – (Available to qualifying businesses)

Name	Incentive
<b>Machinery Sales Tax Exemption</b>	On manufacturing equipment
<b>B&amp;O Tax Credit</b>	For new manufacturing employees
<b>Building Sales &amp; Use Deferral/Waiver</b>	Construction of manufacturing facilities
<b>Industrial Revenue Bonds</b>	Offers lower interest rates
<b>Customized Worker Training Grants</b>	Washington State
<b>R&amp;D Tax Credits</b>	

Source: Department of Revenue – [Sales Tax Exemption](#), [B&O Credit](#), [Other](#)

### Utilities

Lewis County has the lowest priced power in Western Washington. Local power comes primarily from hydro and nuclear power.

Type	Provider
<b>Electricity</b>	Lewis Co. Public Utility District; Centralia City Light
<b>Water &amp; Sewer</b>	City
<b>Natural Gas</b>	Puget Sound Natural Gas & Williams Natural Gas
<b>Telecommunications</b>	Toledo Tel & Century Link; Lewis County PUD Open-Access

Source: PUD; PSE; Williams; Toledo Tel

**Shipping Facts**

UPS & FedEx are the private shipping carriers that serve our community.

**UPS:** The last flight out is from Boeing Field at 6:45 PM. The last pick up in our area is 4:00 PM for air and 5:00 PM for ground. UPS can negotiate pick up times.

**FedEx:** The last pickup time for air is at 1:00 PM and for ground it is at 3:30 PM in our area.

FedEx can negotiate pick up times. If a contract already exists with FedEx at a different location they will do their best to fulfill that contract here.

**Infrastructure****Major Roadways**

Lewis County is located on Interstate-5 midway between Portland & Seattle. Highway 12 is a major state highway that runs East/West.

City	Distance	Avg. Driving Time
<b>Portland</b>	85 Miles	90 Minutes
<b>Seattle</b>	85 Miles	90 Minutes
<b>Vancouver B.C.</b>	228 Miles	4 Hours and 30 Minutes
<b>Los Angeles</b>	1050 Miles	15 Hours and 30 Minutes

Source: Google Maps

**Major Railways**

All major railroads serve Lewis County. There are public rail reloading facilities available. Additional reload sites served by rail spurs are also available.

Name	Orientation
<b>Burlington Northern Santa Fe (BNSF)</b>	North/South
<b>Union Pacific (UP)</b>	East/West
<b>Genesee Wyoming</b>	West
<b>Tacoma Rail</b>	North/South

Source: [Department of Transportation](#)

**Airports**

The Chehalis-Centralia Airport is a general aviation airport which can meet most corporate needs. The international airports serve markets in Europe, Central America, & Asia.

Name	Type	Distance	# of Runways
<b>Chehalis-Centralia Airport</b>	Corporate Aviation	2 Miles	1
<b>Seattle-Tacoma International Airport</b>	Commercial	80 Miles	3
<b>Portland International Airport</b>	Commercial	85 Miles	3

Source: [Chehalis-Centralia Airport](#); [SEATAC](#); [PDX](#)

**Deep Water Ports**

The Port of Tacoma, 54 miles north of Chehalis, provides both containerized and break bulk shipping. The Port of Olympia, 20 miles north of Chehalis, provides break bulk shipping.

*Union Employers*

TransAlta – Energy

Darigold – Food

Fred Meyer -  
Distributor*Other Facts*Most distributors in  
Lewis County are  
non-unionMost construction  
companies in Lewis  
County are non-union

## Major Employers & Expansions

### Major Private Employers

Name	City	Service	# Emp.
<b>Providence Hospital</b>	Centralia	Healthcare	800
<b>Fred Meyer Distribution Center</b>	Centralia	Distribution Center	400
<b>Hampton Lumber Mills</b>	Randle	Sawmills	296
<b>UNFI</b>	Centralia	Food Distribution	300
<b>Cardinal FG Co.</b>	Chehalis	Glass Manufacturing	241
<b>Morton General Hospital</b>	Morton	Occupational Therapists	172
<b>Sierra Pacific</b>	Centralia	Lumber Mills	172
<b>Pacific Cataract &amp; Laser Inst.</b>	Chehalis	Physicians & Surgeons	160

Source: InfoUSA

### Major Distribution/Manufacturing Operations

Company Name	City	Type	Products	# Emp.
<b>Fred Meyer Distribution Center</b>	Centralia	Dist.	Distribution Center	400
<b>National Frozen Foods Corp</b>	Chehalis	Mfg.	Food Processor	400
<b>Cardinal FG Co.</b>	Winlock	Mfg.	Glass	241
<b>Hardel Mutual Plywood Corp</b>	Chehalis	Mfg.	Plywood	225
<b>Braun Northwest</b>	Chehalis	Mfg.	Ambulances	118
<b>Pace Edward</b>	Centralia	Mfg.	Truck Accessories	100
<b>Ryerson</b>	Centralia	Mfg.	Distributor	80

Source: InfoUSA

### Expansions/Closures

Company Name	City	Products	Exp./Clos.	# Emp.
<b>Richie Brothers</b>	Chehalis	Equipment Auction	Expansion	
<b>Ryerson</b>	Centralia	Distributor	Expansion	
<b>Price Container</b>	Centralia	Containers	Expansion	

Anticipated Closures: TransAlta and Darigold are expected to close down at the end of 2025.

Source: Economic Alliance of Lewis County

## Research Institutions

The nearest large scale research institution is the University of Washington located in Seattle. It is one of the most prestigious medical schools in the country.

## Overview

Schools spend roughly \$10,260 per student and there are roughly 19 pupils per teacher.

## Education

### K-12 Public School System

School System	City	Elem.	Middle	High	HS Enrollment
<b>Chehalis School District</b>	Chehalis	3	1	3	1,170
<b>Pe Ell, Napavine, Winlock, Adna</b>	Various	1		4	1,404
<b>Mossy, Morton, White Pass</b>	Various			3	441
<b>Onalaska, Toledo</b>	Various			3	538
<b>Centralia School District</b>	Centralia	5	1	2	1,046
<b>Total HS Enrollment</b>					4,599

Source: [niche.com](https://niche.com)

### Private Elementary & High Schools

Name	City	Grade Levels	Enrollment
<b>St. Joseph School</b>	Chehalis	Pre-K to Grade 8	118
<b>Lewis County Adventist School</b>	Chehalis	Pre-K to Grade 10	64
<b>Centralia Christian School</b>	Centralia	Pre-K to Grade 8	171

Source: [USA.com](https://USA.com)

### Post-Secondary Education

Name	City	Type	Enrollment
<b>Centralia College</b>	Centralia	Community	1,486
<b>South Puget Sound Community College</b>	Olympia	Community	2,378
<b>Saint Martin's University</b>	Lacey	4-yr. Private	1,071
<b>Evergreen State College</b>	Olympia	4-yr. Public	4,284

Source: Respective Colleges

### Education Attainment 2024

Name	Percent	Number
<b>Less Than High School</b>	9.7%	4,090
<b>High School Diploma</b>	32%	13,457
<b>Some College</b>	26.5%	11,153
<b>Associate's Degree</b>	12.1%	5,092
<b>Bachelor's Degree</b>	13.7%	5,789
<b>Graduate Degree or Higher</b>	6.0%	2,534
<b>Total</b>		36,037

Source: [US Census & Jobseq](https://US Census & Jobseq)

**Professional Sports:**

Seattle Seahawks,  
Seattle Mariners,  
Seattle Kraken,  
Seattle Sounders,  
Seattle Storm,  
Seattle Reign,  
Seattle Seawolves.

**College Sports:**

The WSU Cougars &  
the UW Huskies.

**Performing Arts:**

Evergreen Playhouse  
and Centralia  
College.

**Retail Centers:**

Centralia is home to  
various factory outlets  
and Chehalis is home  
to many main chain  
stores.

**Golf Courses:**

Riverside Golf  
Club, Newaukum  
Golf.

**Parks:**

Aquatics center, city  
parks, various trails.

**Museums:**

Veterans, historical  
museums.

# Quality of Life

## Cost of Living

Overall the county places at just about average in terms of cost of living compared to the national average. The only significant differences are the relatively affordable utility rates in our community and the higher cost of healthcare as a result of our being a relatively rural county.

ACCRA Cost of Living	Score
Overall	97.6
Grocery Items	98.9
Housing	107.3
Utilities	72.4
Transportation	105
Health Care	116
Misc. Goods & Services	101.8

Source: [Best Places](#)

## Housing & Apartments

Lewis County is host to 36,037 housing units and the median price is \$341,500 (compared to \$135, 500 in 2022). The vacancy rate is extremely low, currently hovering just over one percent.

Housing Disposition	Percent	Number
Homeowner Vacancy	1.3%	318
Rental Vacancy	4.2%	372
Renter-Occupied Housing Units (% of Occupied Units)	25.8%	8,349
Owner-Occupied Housing Units (% of Occupied Units)	74.2%	23,965

Source: American Community Survey

## Hospitals

Providence Centralia Hospital has roots dating back to 1856 when the first Catholic nuns came out west to serve the poor. Today the hospital provides emergency, diagnostic, cancer, birthing and surgical services. The hospital has 127 beds and is a nonprofit organization.

Arbor Health–Morton Hospital is a critical access hospital serving East Lewis County offering inpatient and outpatient services, emergency department, diagnostic imaging and more. The hospital has 25 acute-care beds.

## Environment

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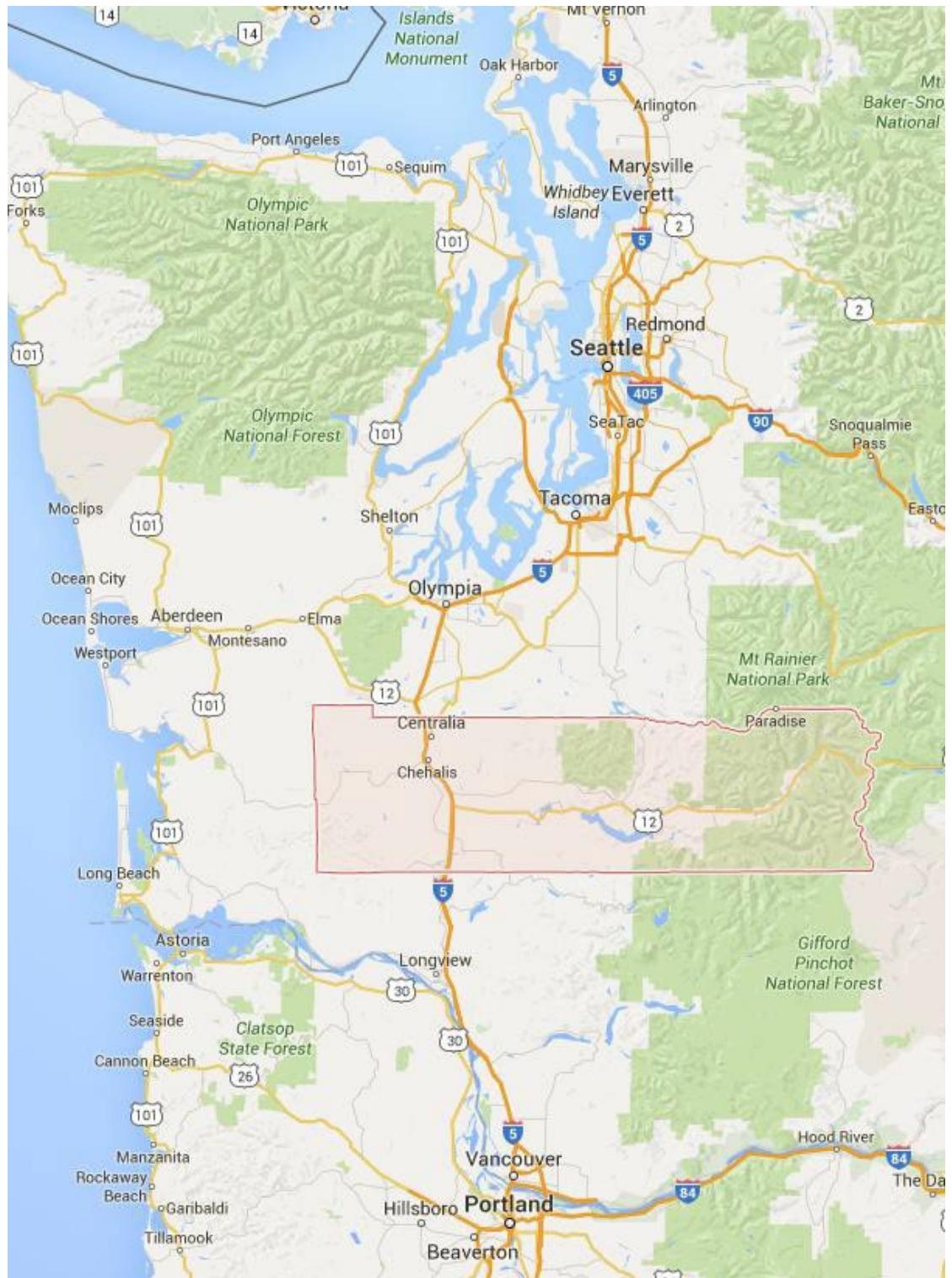
### Climate Conditions

The climate is very temperate year round with only mild variations in temperature. There are on average 138 sunny days a year and roughly 165 days of precipitation.

Category	Unit
Average Daily Temperature – July	63°F
Average Daily Temperature – January	41°F
Annual Average Temperature	51°F
Annual Average Rainfall	46.5 inches
Annual Average Snowfall	6.1 inches
Average Wind Speed	13.03 mph

Source: [Best Places](#); & [USA.com](#)

## Our Area



## SWOT Analysis

### Chart

The following chart summarizes major findings and recurring themes based on input and feedback received from 25 stakeholder interviews, 4 focus groups, and various additional meetings held in the community. The chart is updated to reflect current information of the period beginning 2022. Themes align with the mission of the Economic Alliance and support those of Lewis County. The beginning Strengths and weaknesses are considered “internal” to the community. Opportunities and threats are considered “external” to the community.

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"><li>Central location; equidistant between Portland &amp; Seattle; advantageous for transportation &amp; distribution</li><li>Inexpensive utilities</li><li>Available, inexpensive land (compared to markets closer to metro areas)</li><li>Inexpensive labor costs</li><li>Inexpensive housing, esp. compared to adjacent northern &amp; southern regions</li><li>Low tax burden (especially property tax rates)</li><li>I-5 corridor access</li><li>Railroad access</li><li>Natural resource rich</li><li>Highway 12 access to Eastern WA</li><li>Strong community college presence; bachelor programs; low student attrition</li><li>Proximity to Olympia &amp; Thurston County area</li><li>Fewer regulations compared to Thurston County</li><li>100+ mile radius of available talent</li><li>Outdoor amenities, recreation opportunities</li><li>Service-oriented residents; sense of community; collaborative culture</li><li>Chehalis Foundation community involvement</li><li>State-level legislator support; receptive political climate</li></ul>	<ul style="list-style-type: none"><li>Flooding</li><li>TransAlta plant layoffs and closure</li><li>Labor availability, skill level, work ethic, and soft skills</li><li>Lack of infrastructure (i.e., sewer in Packwood, Winlock Urban Growth Area)</li><li>Low average wage</li><li>Brain drain; loss of local talent</li><li>Lack of professional office space</li><li>Lack of rural development</li><li>Low lease rates (difficult to recoup investment on new construction)</li><li>Development costs</li><li>Permitting and environmental regulations</li><li>Inter-generational poverty</li><li>Educational &amp; professional mentoring programs &amp; opportunities for young people</li><li>Available housing &amp; rentals</li><li>Vocational training opportunities</li><li>Entertainment options (arts, culture, &amp; restaurants); perception that the county lacks culture &amp; arts, esp. among younger generations</li></ul>

<ul style="list-style-type: none"> <li>• Conservative culture; traditional values</li> <li>• Business-friendly</li> <li>• Temperate climate</li> <li>• Quality of life</li> <li>• Community history</li> <li>• Young professionals</li> <li>• Partnerships of organizations to Economic Development that are county-wide</li> </ul>	
 <b>OPPORTUNITIES</b>	 <b>THREATS</b>
<ul style="list-style-type: none"> <li>• Further development of large-scale industrial sites</li> <li>• TransAlta grant and coal transition fund</li> <li>• TransAlta facility and IPAT industrial park development</li> <li>• Taking better advantage of proximity between PDX &amp; SEA</li> <li>• Cultivating new projects through business retention and expansion program</li> <li>• Small Business Development Center under the Alliance banner</li> <li>• Flood mitigation promotion; develop a marketing (or counter-marketing) tool that would help alleviate fears about flooding</li> <li>• The Alliance being a stakeholder convener and a champion of local issues</li> <li>• Encourage developers to construct buildings, industrial facilities, and business parks</li> <li>• Unite as a community to promote and support redevelopment within the smaller communities</li> <li>• Partnership with Centralia College; expansion of Centralia College bachelor degree programs</li> <li>• Educational attainment; growing STEM program in K-12</li> <li>• Promotion of recreational opportunities</li> </ul>	<ul style="list-style-type: none"> <li>• Flooding and wild fire natural disasters</li> <li>• Growth Management Act (GMA) restrictions</li> <li>• Tariffs that raise costs, reduce imports and exports</li> <li>• Possible future economic downturns</li> <li>• Political climate and partnership capacity between municipal, county, and economic development entities</li> <li>• Potential increasing community polarization</li> <li>• Declining enrollment in various local school districts</li> </ul>

## Strategic Direction & Action Plan

### Industrial Development Partnerships

Partnerships with the Lewis County development community, including both public and private entities, are crucial to leveraging a collective effort and spurring the community-wide momentum needed to undertake and enhance large-scale development projects.

Lewis County's four main public industrial development partners are the Port of Centralia, the Port of Chehalis, the Industrial Commission, and the Industrial Park at TransAlta (IPAT). The Port of Centralia and Port of Chehalis both own two industrial parks, each with abundant available acreage. IPAT

represents a rare opportunity for development in terms of size (4,400 acres), proximity to I-5 and major population centers, and infrastructure capacity. There is also an active industrial development Park in Winlock

#### DEFINITION: SHOVEL-READY

A shovel-ready site is one considered fully serviced by all utilities, fully permitted for the intended use, and offering no impediments for immediate development.

The following strategies outline a methodology to 1) identify and cultivate potential new industrial development partnerships; 2) maintain and strengthen existing partnerships; and 3) broadly enhance current and future industrial development efforts.

1. Enhance existing industrial development partnerships and create new partnerships in an effort to continue to address community issues and conduct industrial and business development.
  - 1.1 Continue to conduct regular, targeted outreach to potential private sector development partners located within the county. This is also executed in coordination with BRE outreach efforts.
    - a. Identify community leaders and business owners that are also large landowners.
      - Utilize the county's Tax Assessor "Parcel Search" database to obtain property and contact information. Develop a schedule in the proposed contact management system (see Strategy 2.2.5.) to conduct periodic phone calls and annual in-person meetings.
      - Ensure understanding of the Alliance mission, and provide information about available development opportunities.
      - Work with interested landowners to facilitate processes on the front end (like zoning, environmental analysis, and permitting) that will expedite development.
        - Facilitate expansion of existing business (e.g. Penske in Winlock)
    - 1.2 Identify and maintain regular contact with developers in Lewis County and in

nearby Portland and Seattle who might have an interest in commercial and/or industrial development.

**1.3** Maintain and strengthen partnerships with each of the Ports and the Alliance's key public-sector industrial development partners.

- a. Conduct quarterly meetings with each entity to discuss progress on current and potential projects and prospects and identify needs.
- b. Develop a central document that keeps a running account of project progress, prospect updates, and infrastructure needs assessment.
- c. Document and promote the Alliance's contributions to partnerships and community.
- d. Develop Memorandums of Understanding (MOUs) and/or contracts with each entity to ensure a clear understanding of expectations, roles, and responsibilities.
- e. Assist in identifying potential funding and financing options for further build-out of infrastructure (See *callout box*).
- f. Investigate development of a streamlined permit process for desirable development.
- g. Consider certifying an industrial site (See *callout box*).

**1.4** Enhance current and future real estate development efforts.

- a. Ensure an adequate supply of "deal-ready" sites for expedited relocation or expansion projects.
  - Promote these properties as such on the Alliance website and in promotional materials.
  - Plan with the County, State, and property owner for one large-scale, shovel-ready site for the desired type of recruitment or expansion.
  - Evaluate whether there are barriers to future development that can be addressed by infrastructure investments.
- b. Continue to maintain the searchable available-property database on the Alliance website.

#### POTENTIAL SOURCES FOR INFRASTRUCTURE FUNDING

- County contributions
- State contributions
- State or federal grant funding
- EDA grant funding
- EB-5 funding

#### CERTIFIED SITES

Certified sites can expedite the site selection process, reduce costs for relocating or expanding companies, and lessen the risks associated with development by providing a third-party vetting and detailed information about the site (including price and availability, utilities, access, environmental concerns and potential development costs). A certified site that is shovel-ready can trim months off a development schedule, which is attractive to site selectors, corporate relocation managers and company decision-makers. While several states around the nation offer public sector site-certification programs, Washington does not. A certification would need to be conducted by a third party firm. Another option is to engage a site selection consultant to conduct the certification.

This accomplishes two tasks at once by engaging the site selector network and certifying the site. A number of site selectors do this type of work. Sites can also contain "specialty certifications" which means their readiness is certified for a particular industry or type of company.

- Ensure information is accurate and up-to-date, and that properties all over the county are represented.
- Expand individual property pages to include narrative descriptions, sale and/or lease terms, transportation access, available incentives, and attachments (e.g., aerial maps, promotional materials, etc.)
- As a long-term objective, add functionality to allow users to share properties with others and export PDFs of particular properties.

c. Protect land that is currently zoned or otherwise designated industrial and commercial office from being rezoned to other uses.

## Workforce Development

Developing and strengthening the available talent pool is an essential component of driving growth and supporting the economy. Throughout the planning process, stakeholders indicated talent and workforce were among the county's biggest challenges. Lewis County stakeholders clearly recognize the pivotal role that talent plays in economic development.

Effective workforce development requires a community-wide effort. It depends upon broad participation, input, and buy-in from multiple workforce-related disciplines within a community, including higher education entities, workforce development boards, local firms, governing bodies, and economic development organizations.

The Economic Alliance enjoys positive partnerships with Centralia College, the Pac Mountain Workforce Development Council (WDC), Centralia College Foundation, United Learning Center, The United Way, neighboring county workforce efforts, human resource consortiums, and staffing agencies. However, more can be done to enhance workforce efforts in the area.

While the county possesses enviable education and training assets, as well as a strong community commitment to education and workforce development, it experiences several challenges regarding talent, such as: higher than average unemployment, lack of skilled labor, average wages, bachelor degree attainment below national averages, and brain drain. The strategies below propose actions to facilitate the attraction and retention of a quality workforce, develop and sustain partnerships with higher education institutions and other workforce entities, and facilitate ongoing enhancements of training programs and initiatives.

### WORKFORCE AREAS FOR IMPROVEMENT

- High unemployment in comparison to neighboring counties, Washington, and the US
- Shortage of skilled labor
- Median wages lower than the US average in many industries
- Bachelor degree attainment levels lower than the state and nation
- Attrition of local talent

2. Facilitate the engagement, development, attraction, and retention of a quality workforce.
  - 2.1 Create or facilitate a regional action plan to better align industry and countywide educational entities.
  - 2.2 Publicize the county's high-demand jobs and career opportunities to help drive students towards the fields of study that support those careers.
  - 2.3 Continue to strive toward closing the gap between the county's labor force availability and the needs of key industry sectors.
  - 2.4 Focus business recruitment efforts, not only on companies paying a higher average wage but also on those that pay a lower average wage but offer unemployed residents a chance to enter the labor force at a practical level and work their way up.
  - 2.5 In tandem with the BRE outreach program, poll businesses to gauge their need for employees and their interest in implementing or expanding internship, apprenticeship, and/or mentorship programs. Prioritize the implementation of these programs at companies that fit the Alliance's target industries. Facilitate connections between STEM school and Centralia College students and interested local employers.
  - 2.6 Identify creative solutions for providing training in work settings to encourage incumbent workers to maintain and enhance their skills (e.g., satellite-provided training program delivered in the workplace).
  - 2.7 Promote participation in regional job fairs and make linkages between employers and interested workers and/or students.
  - 2.8 Support volunteer programs at regional higher education institutions to help link existing students with the needs of the community.
  - 2.9 Develop a database of work-based learning opportunities in the region.
  - 2.10 Ensure a range of housing options exists to accommodate a younger, more mobile population.
  - 2.11 Foster and sustain strategic partnerships with educational entities and workforce-related organizations.
    - Maintain and make advancements to the Alliance's partnership and alignment with Centralia College.
      - (a) Consider relocating the Alliance offices to have closer proximity to the activities of the college.
      - (b) Continue quarterly meetings with college representatives to discuss education and training alignment with the needs of industry.
        - (i) Continue to explore opportunities to partner on grant funding for projects and programs.
    - Sustain and enhance partnerships with local high schools and the Lewis County Young Professionals group.

- (a) Partner with local high school and college alumni networks to contact former residents and promote career opportunities in Lewis County.
- (b) Consider leveraging an existing ambassador group to implement a social media campaign such as #ComeHomeToLewis or #10ReasonsToReturn. In the posts, they highlight such items as new employers, new employment opportunities, and new quality of life amenities.
- (c) Promote job openings and professional opportunities through the Lewis County Young Professionals.
- (d) Facilitate the development of summer internship, apprenticeship, and/or mentorship programs so that college students returning home for the summer can connect with local employers.

## Public Policy Initiatives

As a public-private partnership and the County's designated Associate Development Organization (ADO), the Alliance serves a broad constituency. Its leadership must position the organization with a clear understanding of local, state, and national public policy issues. Under new leadership, the Alliance has leveraged its structure, relationships, and expertise to influence policy at all levels of government, and create a unified voice for the county on specific issues.

The following strategy recommends internal guidelines related to the Alliance's desired stance on a variety of public policy issues. This strategy also makes suggestions on thresholds for the Alliance's engagement on public policy, especially those that affect the organization's economic development efforts. Finally, the strategy suggests actions to strengthen Lewis County's positions in state and federal legislative affairs and government resource allocation.

3. Determine the organization's internal standards on public policy issues.
  - 3.1 Develop, document, and adopt internal guidelines that reflect the organization's approach to and general stance on public policy issues.
    - a. Consider the unique constraints of the organization's structure (i.e., public/private partnership), and how that influences the approach on public policy issues.
    - b. Determine existing and potential public policy issues that could affect the Alliance and county.
    - c. Determine the Alliance's engagement threshold. Factors to consider include:
      - Does the issue have a positive or negative effect on the Alliance's economic development efforts?
      - Will the issue have a positive or negative effect on the entire county?
      - Is the county united or divided on its stance on the issue?
      - How would the Alliance's position and/or involvement in a public policy issue affect the organization's relationship with its constituency?
      - Does the Alliance have a unique and valuable contribution to a policy solution?
      - If the Alliance takes a position, is it likely to influence the final decision?

- d. If it's determined that the organization should take a position, assume the position that preserves the organization's long-term interest.
- e. If the organization takes a position, determine the organization's level of engagement and strategic role on the issue (See *callout box*).
- f. Strengthen Lewis County's positions in state and federal legislative affairs and advocate for favorable government resource allocation.
  - Define and document an economic development agenda that reflects the priorities of the county overall.
  - Deliver a consistent message to educate and advise government officials on Lewis County's priority economic development issues.
    - (a) Create talking points and promotional materials to educate both elected officials and constituents.
    - (b) Develop communication templates including white paper formats, legislative summaries, talking points, and press releases.
  - Forge and maintain strong connections with elected officials and key agency staff.
    - (a) Convene a group of community partners—businesses, individuals, local governments and countywide institutions—and host an annual legislative trip to Olympia each year. Make appointments with legislators.
    - (b) Develop a legislative database of local, countywide, state, and federal elected officials.

#### SUGGESTED PUBLIC POLICY ENGAGEMENT LEVELS

- **Lead:** position the organization as a lead voice on the issue.
- **Partner:** strategically partner with an individual or group of people with a similar stance and collaboratively advocate for the issue.
- **Facilitate:** assist in convening the appropriate parties to collaborate and act on the issue.
- **Serve:** provide various resources and/or assistance to individuals or groups that are taking a lead role in advocating for the issue.
- **Monitor:** stay abreast of the latest developments of the issue and make ongoing assessments of the organization's best role on the issue.

## Target Industry Development Initiative: Agriculture

Agriculture is the original Lewis industry. It's essential to the rural areas of our community. But it also plays a central role in making other industries go: from value added manufacturing, to transportation, logistics, hospitality and food services and even hospitals, assisted living facilities and schools. The hyper-local ag industry also plays an invaluable role in bringing community together, at farmers' markets, food fairs, food trucks and elsewhere. Ag operators face myriad challenges, from ever-changing markets to market access and even tariffs.

1. Execute an agriculture supply chain gap closure initiative.
  - 1.1 Identify goods and services that could be produced and purchased in Lewis County to reduce 83% supply chain gap
    - a. Consider viability of Postharvest Crop Activities (\$5.5M gap) and Other Animal Food Manufacturing (\$5.5M gap)
      - Explore other options enumerated as goals in Lewis County Comp Plan: food processing growth; regional food hub strategy; and creation of cottage industry; other value added food production and specialty food manufacturing
    - b. Coordinate with Port, Lewis Economic Alliance and other partners on infrastructure, market and transportation logistics enhancements
      - Partner with WSU Extension, Northwest Agriculture Business Center (NABC), and regional CEDS funding entities to secure implementation funding where investment is likely to create or retain employment
  2. Create a regional AG Task Force to build trust and partnerships, identify priorities and address gaps for growing a successful agricultural economy and community.
    - 2.1 Assemble team and identify lead manager
      - Partners could include Port of Chehalis, NABC, WSU Extension, Farm Bureau, Lewis Economic Alliance, Lewis County and/or others
      - Establish vision, mission and values
      - Adopt protocols for governance and administration, funding
      - Develop business case model for specific services and anticipated outcomes
      - Complete market gap analysis to determine priority in-demand products
      - Determine final SOPs, staff and funding plan
  3. Coordinate direct-to-market agriculture product sales growth.
    - 3.1 Identify most likely purchasers
      - Examples include: local schools, Centralia College, correctional institutions, subsidized farm stores, community supported agriculture (CSAs) and others
      - Explore Blue Zone support opportunities to help make local, healthy food to Lewis County residents and create a conducive environment for workforce expansion

4. Work with County and landowners to facilitate and grow agritourism opportunities.
  - 4.1 Create a multi-disciplinary task force to isolate most promising opportunities
    - Identified options include Bed and Breakfast venues, farm parks, farm stands
    - Identify challenges and solutions for regulatory and development barriers
    - Partner with the Tenino Agriculture Innovation Park to access business counseling services, equipment, specialty manufacturing space, start-up training and retail space
5. Develop a land and labor development and retention strategy.
  - 5.1 Hold farm owner/operator listening sessions to determine current priorities
    - a. Partner with WSU Extension, NABC, Port to conduct surveys, focus groups and other direct engagement to identify most pressing current challenges
      - Test existing assumptions: on-farm worker housing; specialty agricultural worker visas; land use easements; zoning and regulatory barriers
      - Identify new or emerging challenges and threats
    - b. Research best practices or options for remedying challenges; share and test with farm owners/operators
      - Develop action plan and implementing team/strategies
6. Expand critical agriculture infrastructure and transport capacity.
  - 6.1 Complete the segregated grain storage and rail transload facility at Port of Chehalis.
    - a. Secure gap funding
      - Continue seeking funding from Washington State programs
      - Pursue funding from USDA, EDA and other federal programs
    - b. Coordinate with existing and potential wheat, barley and other growers and producers
      - Develop a producer network and communications plan
      - Identify other ag infrastructure priority needs
      - Ensure ag community knows how to access services

## Target Industry Development Initiative: Tourism and Recreation

The Tourism and Recreation Industry Cluster is home to almost innumerable boundary-spanner sectors in Lewis County. Individual businesses are interdependent on one another for success. Workers in one subsector often transfer among the other subsectors. The cluster is an essential component of our community that weaves from urban to rural area like a string of pearls. While Lewis has long been a nature-based destination, our increasing portfolio of sports, cultural and urban experience attractions reflect our growing role as a destination community – for visitors and residents alike. To sustain and capitalize on these trends, our community will need to expand our portfolio of opportunities – not only to grow taxable sales revenue, but to attract and grow our population centers and employment base.

### 1. Facilitate and support implementation of the Lewis County Tourism Strategic Plan.

#### 1.1 Facilitate and support downtown redevelopment

- Coordinate with cities, towns, local businesses and businesses orgs
- Recruit and support unique shopping and dining establishments
- Develop and implement marketing strategies consistent with plan recommendations
- Support festivals and events that attract visitors spending

#### 1.2 Increase and enhance physical tourism infrastructure

- Recruit and incentivize lodging facilities to locate or add capacity throughout the county
- Develop mobility hubs with info kiosks, internet and access to transportation
- Create and implement wayfinding signage and guides
- Continue capacity and accessibility investment at Ed Carlson Memorial - South Lewis County (TDO) Airport

#### 1.3 Continue to grow and diversify core tourism offerings

- Priorities to consider include, but are not limited to:
  - (a) Sports venue maximization
  - (b) Fishing and hunting destination/fishing derbies
  - (c) Rail museum and day and overnight trips

#### 1.4 Enhance operational and promotional infrastructure

- Assess the potential for:
  - (a) Creating a formal Lewis County Tourism Partnership organization
  - (b) Developing a tourism Ambassador Program
  - (c) Establishing a countywide Tourism Promotion Area (TPA) funded through lodging tax

- Establish a staffing and funding program based on final assessment of viability
  - (a) Expand tourism support materials and marketing approaches, including:
    - (b) Creating a guide program and guided tours of the county
    - (c) Developing a full-scale marketing and branding program
    - (d) Working with influencers
- 2. Develop stable funding to support implementation of tourism priorities.
  - 2.1 Conduct a retail sales gap analysis
    - Identify priority goods and services providers missing from local profile
    - Work with existing providers to expand their offering profile where feasible
    - Recruit missing service providers where necessary
  - 2.2 Determine the viability and interest level in adopting a Cultural Access Sales Tax (CAST)
    - Model potential CAST tax revenue (@0.1%) volumes for various cities and the county
    - Develop an inventory of potential uses/benefits of revenue
    - Uses might include: underwriting or sponsoring tickets to events and places for low-income children and seniors; creating new cultural arts programming (in schools, at parks, et al); providing free transportation to events; offering “free” days at local museums and other venues; and installation of capital projects
    - Connect revenue to implementation of the Tourism and Recreation Strategic Plan
    - Test viability with stakeholder
      - (a) Focus groups
      - (b) Community surveys
      - (c) Polling
  - 2.3 Pursue capital project funding through CERB, USDA, EDA and others
- 3. Proactively market business development and training resources for tourism and recreation based business ventures and support industries.
  - 3.1 Secure grant funding to subsidize training and start-up costs
    - Partner with Thurston Center for Business and Innovation to access Scale-Up and related business advising services

## Target Industry Initiative: Value Add Wood Products

Lewis County has a Bioeconomy Development Opportunity (BDO) Zone rating of AA. This rating is attributed to the eastern portion of the county having access to “sufficient quantities of wood fiber required for large-scale bio-projects available at low risk due in part to the advanced quality and capacity of supply chain equipment and personnel.” Industry leaders, scholars and entrepreneurs have long sought way to put biomass to beneficial, cost-effective use. Recent advances suggest that day may be coming.

The zone encompasses an 8,177 square mile area in western, defined by a 75-mile drive distance from Centralia. The regional wood products industry is one of the largest in the country, producing over 1 billion board feet/year (8 million tons/year) and providing direct employment to over 10,000 and indirect employment to over 20,000. It is estimated that new projects seeking to utilize woody biomass for the production of energy, fuels, chemicals, or other bio-products would have access to 600,000 bdft/yr (1.2 million tons/yr) of wood fiber in the form of pulpwood, forest residue, and sawmill residuals. Pulpwood is currently underutilized in the region owing to the continued decline of the North American pulp and paper industry. There are presently five pulp and paper mills operating within the zone,

Location advantages include proximity to major highways, railways, ports, airports, and markets. Although direct access to many essential utilities is not currently available, nearby industrial connections are present. Access to these connections is expected to be eased with the assistance of IPAT, Lewis County, and other local and state organizations.

Primary demand is for pulp and paper, cogeneration and wood pellet production.

1. Survey existing forest resource operators and land managers to identify any existing bioeconomy activities or plans.
  - 1.1 Identify ways the Alliance can help accelerate or launch bio-projects (e.g. making supply chain connections; securing federal funding for capital projects; et al).
  - 1.2 Research and/or tour other existing operations successfully deploying emergent processes or technologies. At a minimum, this might include:
    - **Biomass** is used to generate heat and electricity at forest products manufacturing facilities and other locations with access to forest residues.
    - **Biochar** is a way to convert low value wood, and other organic material, into a concentrated and carbon-storing form through pyrolysis. Biochar has a number of applications in agriculture, construction, environmental remediation, and carbon storage. It can also be used in wastewater treatment processes.
    - **Mass Timber** is a new category of wood product, comprised of multiple solid wood panels nailed or glued together, which provide exceptional strength and stability. It's a strong, low-carbon alternative to concrete and steel. Mass timber include cross-laminated timber (CLT), nail-laminated timber, glulam, mass plywood panels, dowel-laminated timber, and laminated veneer lumber. It can be used in a range of construction, including mid-rise construction. Structural Round Timber (SRT) is mass timber that utilize minimally processed whole trees for the construction market.
    - **Biorefineries** convert wood into liquid fuel for heating, transportation, and aviation.

## Evaluation Framework

Performance measures are used to evaluate the organization's implementation of the CEDS and its impact on the regional economy.

### Purpose

Counties must consult cities, towns, port districts, and associate development organizations in order to disburse funds. As per RCW 82.14.370 the funds may only be used to:

- finance "public facilities" that facilitate the creation or the retention of business and jobs
- finance personnel in the office of a county, port district, or associate development organization that facilitate the creation or the retention of business and jobs

### Public Facilities Definition

As per RCW 82.14.370 the public facility must be listed under the county economic development plan or the capital facilities plan and examples are included below:

- bridges, roads, railroads, and transportation infrastructure
- domestic & industrial water facilities, sanitary sewer facilities, and storm sewer facilities
- research, testing, training, and incubation facilities in innovation partnership zones (RCW 43.330.270)
- electrical facilities, natural gas facilities, telecommunications infrastructure, earth stabilization
- commercial infrastructure, port facilities, buildings, structures

### Attorney General's Office

As per the 2001 opinion of the Washington State Attorney General's Office, the following are uses defined in the statute:

- capital facilities costs, including acquisition, construction, rehabilitation, alteration, expansion, or improvements of public facilities;
- costs of development and improvement for the public facilities;
- project-specific environmental costs;
- land use and permitting costs;
- costs of site planning and analysis;
- project design, including feasibility and marketing studies and plans, and debt and revenue impact analysis

## Does Your Project Qualify?

Per RCW 82.14.370 the .09 funds may only be used to:

- finance public facilities that facilitate the creation or the retention of business and jobs
- finance personnel in the office of a county, port district, or associate development organizations that facilitate the creation or the retention of business and jobs

## Which Public Facility Is Your Project?

The public facility must be specifically listed under RCW 82.14.370 and listed under the county economic development plan (or capital facilities plan). Please select the criteria which correspond to your project.

Bridges	Domestic water facilities	Research facilities	Electrical facilities	Earth stabilization
Roads	Industrial water facilities	Testing facilities	Natural gas facilities	Buildings
Railroads	Sanitary sewer facilities	Training facilities	Telecommunications infrastructure	Structures
Transportation infrastructure	Storm sewer facilities	Incubation facilities	Commercial infrastructure	Port facilities

## How Can The Money Be Used For Your Public Facility Project?

Washington State Attorney General 2001 No.5 opinion states that funds for this statute may only be used in the following ways. Please select the criteria which correspond to your project.

project-specific environmental costs	costs of site planning & analysis	land use & permitting costs
capital facilities costs, including acquisition, construction, rehabilitation, alteration, expansion, or improvements of public facilities	project design, including feasibility and marketing studies & plans, and debt & revenue impact analysis	costs of development & improvement for the public facilities

## What is your “Public Facilities” project?

Please provide a brief description of your project in the space below.

Description:

## How Will This Project Create or Retain Business or Jobs?

“Jobs” are defined by the .09 advisory committee as employment that produces products and services and exports products and services outside of Lewis County that results in new money coming into the community. This is traditionally manufacturing, logistics, and other production facilities. This typically excludes; retail and service sectors and other tertiary jobs producers.

Description:

Category	Created (1 yr.) - Name/Number	Retained (1 yr.) - Name/Number
<b>Businesses</b>		
<b>Direct full-time jobs</b>		
<b>Direct part-time time jobs</b>		
<b>Indirect Jobs</b>		

## What Will Be the Cost of the Project?

The County Commission may disburse funds as both grants and loans. No funding will exceed \$600,000 unless it is deemed an extraordinary circumstance by the Commission. The County negotiates the terms of each award. This may include interest rates or disbursement schedule.

Total Project Cost:	Requested Amount:	
<input type="checkbox"/> Loan	Amount:	<input type="checkbox"/> Grant (Limit \$200,000) Amount:

## What Is the Timeline to Completion?

Articulate the projected timeline of for this project as well as its completion date.

Description:

## Committee Evaluation

### Economic Benefits

The following are metrics that provide an aid in determining which projects may receive funding:

Questions	Metric
Does the proposed project create jobs? How many?	
Does the proposed project retain jobs? How many?	
What is the cost per job created/retained? (divide dollars requested by jobs created and/or retained)	
What is the total number of full time jobs created/retained?	
What is the total number of part time jobs created/retained?	
How many businesses will directly benefit from this project?	

### Readiness to Proceed

The following are metrics that we have identified as an aid in determining which projects may receive funding:

Questions	Metric
Is this project a “Public Facility” that has an economic development purpose?	Y/N
Have entitlements been obtained and required permits issued/in process?	None/Some/All
Does this project have a clear timeline and scope of work?	Y/N
If this request is approved, what is the amount of match funding that is secured?	
What is the probability of completion from 1-10 (10 indicates a high probability)?	

# Agriculture Sector Profile

July 2025

## Overview

According to the most recent US Census of Agriculture, there were 1,565 farms operating in Lewis County as of 2022. This reflects a decline of 158 farms from the prior census completed in 2017. In 2022, there was an estimated 118,995 acres of land in active farm operations, which is about 4,000 fewer acres than there were in 2017. Some of the land managed by defunct farms has been absorbed other existing farms resulting in the growth of average farms size from 71 to 76 acres. Local observers point to the barriers created by the pandemic for the recent decline, including labor loss, reduce access to markets and the disruption to essential services such as processors.

About three-quarters of all farms are between 1 to 49 acres in size, but there are also 40 farms that are 500 acres or larger. Nearly half of all farms raise livestock or poultry, and about two-thirds of all farms manage cropland – primarily hay and haylage. About 50 farms manage nearly 1,000 acres of vegetable crops, and another 50 manage floriculture/nursery crop operations covering over a half million square feet combined.

Notably, while the number of berry farms dropped from 56 to 47 between 2017 and 2022, the volume of acreage in berry farming grew from 258 to over 1,500 acres. Local observers note that much of this growth appears to be driven by in-migration of berry farmers from northwest Washington and Canada. The dominant berry crops are blueberries and raspberries. Dozens of other farms grow a variety of fruits, nuts and vegetables though no single crop is dominant. There are an estimated 221 acres of orchards in Lewis County, but the number of orchard farms dropped from 81 in 2017 to 61 by 2022.

Nearly all Lewis farmland is privately owned, with relatively few farm rentals (about 200 ac.), and nearly 40% of more than 2,700 crop producers are female – a high percentage relative to other Washington counties. Forty percent of producers are full-time farmers and the median tenure for all farmers (time on same farm) is approximately 20 years.

There are over 400 farms operated by military veterans, 200 by young farmers, and 565 by new or beginning producers. As of 2022, the market value of all agriculture market products sold in Lewis County was nearly \$2 Million (about \$126,000 per farm on average), up from \$1.36 Million (\$79,000 per farm) in 2017. Area farms employed over 320 workers, with almost no migrant labor.

## Industry Subsector Presence

The table below provides wage and employment data for all major Agriculture subsectors. LQ, or Location Quotient, shows the relative presence of an industry sector in Lewis County compared to the national average – the higher the LQ, the higher the presence and concentration of an industry in a fixed geographic location. Most Lewis County agricultural subsectors have high LQs, but especially Berry Farming. Crop and Animal Production account for about half of the total Ag workforce.

6-Digit Industry	Empl	Avg Ann Wages	LQ	Annual Demand	Forecast Ann Growth
Crop Production (Proprietors)	278	\$35,445	5.79	30	0.2%
Animal Production (Proprietors)	246	\$35,399	3.57	26	0.1%
Nursery and Tree Production	100	\$37,769	6.75	14	0.8%
Berry (except Strawberry) Farming	98	\$42,937	27.13	13	0.8%
Dairy Cattle and Milk Production	59	\$34,642	3.23	8	0.2%
Support Activities for Animal Production	54	\$31,866	6.01	8	0.8%
Other Vegetable (except Potato) and Melon Farming	36	\$32,002	3.12	5	0.8%
Farm Labor Contractors and Crew Leaders	25	\$33,521	0.75	4	0.8%
Remaining Component Industries	144	\$38,767	10.84	18	0.4%
<b>Agriculture Total</b>	<b>1,041</b>	<b>\$46,906</b>	<b>4.24</b>	<b>126</b>	<b>0.4%</b>

## Employment

As of Q2 2024, there were an estimated 1,041 ag workers in Lewis County (Logging and Support Activities for Forestry are removed from NAICS code). This reflects a 2.6% drop in employment from a decade prior. While employment has declined slightly, wages, at a current average of nearly \$47,000 per worker, have increased 4.3% over that time span – a rate higher than the national average.

Agriculture represents slightly more than 5% of the total Lewis County workforce. Although there is forecast demand for 126 new workers per year industry-wide, most of that is replacement and transfers vs. new employment growth. Local producers suggest that the relatively low labor demand is, at least to some degree, attributable to growth in automated processes.

The table shows the prevalence of ag workers by occupational category. At more than 500, Farmers, Rancher and Other Ag Managers drives overall employment. This figure includes private farm operators of all sizes – 61% of ag employment is private industry, and 39% self-employed. While the agriculture sector has a relatively modest average wage, the wage spectrum is extremely wide, with considerable income opportunity for CEOs of large operations and other managers.

6-Digit Occupation	Empl	Avg Ann Wages	Annual Demand
Farmers, Ranchers, and Other Agricultural Managers	511	\$89,800	55
Farmworkers and Laborers, Crop, Nursery, and Greenhouse	166	\$41,700	26
Farmworkers, Farm, Ranch, and Aquacultural Animals	68	\$47,600	11
Managers, All Other	54	\$132,800	5
Heavy and Tractor-Trailer Truck Drivers	50	\$64,600	5
Animal Trainers	37	\$53,300	6
First-Line Supervisors of Farming, Fishing, and Forestry Workers	33	\$72,800	5
Chief Executives	31	\$249,300	2
Animal Caretakers	24	\$42,800	5
Remaining Component Occupations	404	\$70,900	48

## Other Special Considerations

The formula-based employment growth forecast assumes current conditions and trends will persist. However, there are a number of factors that could present unanticipated growth. These include:

### Farmers' Markets and Potential for Regional Lewis County Farmers' Market Association

There are five small farmers' markets operating in Lewis County (Centralia, Chehalis, Toledo, Morton and Packwood). A recent assessment suggested that, due to their small size and other market access challenges, the markets would benefit from a staffed Association office to support marketing and implementation of best practices. The desired goal is to expand access to direct market consumers. A follow up feasibility study suggests that the next step is to organize producers, primarily on the west end of the County. There is also potential for partnership with *Blue Zone Activate*, which shares the goal of marketing local, healthy food to Lewis County residents.

### Lewis County Comprehensive Plan

The Comp Plan includes existing goals that could be advanced, in part, through CEDS funding and technical assistance. Agriculture goal topics include:

- Job creation and wage growth
- Creation of cottage industry
- Food processing growth
- Preservation of ag land and workforce talent
- Partnership with WSU Extension to diversify, sustain ag economy
- Increased farm marketing and promotion
- Expansion of agritourism opportunities
- On-farm worker housing
- Regional distribution and food hub facility
- Advocacy for regulatory solutions

### **Tenino Agriculture Innovation Park**

This newly-opened ag business center could potentially address many of the barriers producers face in accessing the broader market. It will offer ag business counseling services, meat cutting equipment, an event venue, space for specialty food manufacturing and retail business, and specialized technical advising for start-ups and value added food production.

### **Southwest Washington Grain Project**

To expedite recovery of the grain sector, devastated by catastrophic flooding nearly a decade ago, and capture ever growing global market demand, the Port of Chehalis is constructing aggregate grain storage and rail transload infrastructure on Port property. The facility will:

- Offer a solution to the loss of vegetable processing contracts in SW WA
- Create marketing opportunities for regional grain producers and others
- Provide infrastructure capacity supporting grain production
- Address a recognized gap in mid-tier grain transload capacity
- Provide new production opportunities

This initiative will help local growers meet storage needs (76% report storage capacity challenges), and expand production by an estimated 116%. It will also reduce market timing issues and also provide enhanced infrastructure to support regional dairies, livestock and poultry producers. Early funding has been awarded from the Distressed Communities Fund (\$800,000) and USDA Rural Business Grant (\$32,650).

### **Supply Chain Gap Closure Potential**

Lewis County ag businesses purchase \$120 million (M) worth of annual goods and services. Currently, just 17% of that is spent inside of Lewis County. Some supplies, such as petroleum, are virtually impossible to replace. But others, like Postharvest Crop Activities (\$5.5M) and Other Animal Food Manufacturing (\$5.5M) might be viable in-county producers.

# Tourism and Recreation Sector Profile

July 2025

## Overview

The Lewis County Tourism and Recreation sector is built around a variety of core products, including:

- Accommodations
- Hospitality services, including food and beverages
- Parks and trails
- Cultural attractions including museums and historical places
- Shopping
- Festivals and events including athletic tournaments
- Guided tours and tourist guides

To better understand this super sector, and to establish a tracking baseline, this profile outlines performance and forecast metrics for the primary industry sectors (Retail; Arts, Entertainment and Recreation; and Accommodation and Food Services) that capture most related economic and employment activity. These three subsectors are interdependent components of the broader Tourism and Recreation sector, and collectively, a major driver of the local economy.

Tourism and Recreation subsectors provide 14 of the top 50 employment sectors in Lewis County, employing thousands of workers and generating hundreds of millions of dollars in wages and tax revenue. Tourism and Recreation also transcends these primary subsectors (and provides multiplier impacts) for the economy – e.g., visitors using car repair shops, hospitals, bus system).

According to data compiled for the Tourism Strategic Plan, between Jul 1, 2021 and July 31, 2023, Lewis County received over 55 million visitors. Of this total, about 4.5 million were unique visitors. On average, depending on the area visited, travelers returned between 8 to 14 times. The heaviest visitation occurs in the north (Centralia, Chehalis) likely due to the density of activities (sports complex, outlet malls, et al), while the east (Mossyrock, Packwood) is less frequently visited due more extreme shifts in seasons. Ultimately, the important conclusion is that many people visit the area for a wide range of reasons. Through implementation of the Strategic Plan, there is great potential to augment the impact of by building stronger brands, capturing more seasonal visitation and increasing length of stay. As visitation grows, so will the lodging tax (over \$1 million for the county in 2024), which can then be reinvested into further development and promotion of tourism products and venues.

## RETAIL SECTOR

### Industry Subsector Presence

About a third of Lewis County retail workers are employed in Warehouses, Super Centers, Grocery Stores and Gas Stations/Convenience Stores. All of these subsector industries, in turn, rely to some extent on visitors/tourists to make their profit margins. New Car Dealers offers the highest average annual wage at almost twice the amount of the overall retail sector average wage.

*New Car Dealers* is not considered a major component of Tourism, but the subsector plays an important role in Lewis given the volume of buyers that travel from out of county to benefit from a lower sales tax rate. While visiting, many of these buyers also purchase food and other goods from local vendors.

Home Centers and Hardware Retailers are forecast to grow the fastest, at nearly 1% annually over the next five years. Hardware Retailers also has the highest location quotient – i.e., the presence of that subsector is 4.63 times greater than would be expected based on comparative locations nationally.

6-Digit Industry	Empl	Avg Ann Wages	LQ	Annual Demand	Forecast Ann Growth
Warehouse Clubs and Supercenters	650	\$47,746	2.19	97	0.3%
Supermarkets and Other Grocery Retailers	550	\$38,955	1.18	86	0.1%
Gasoline Stations with Convenience Stores	344	\$33,577	2.19	56	-0.5%
Home Centers	199	\$39,947	1.54	28	0.9%
New Car Dealers	195	\$86,665	0.98	23	0.6%
All Other General Merchandise Retailers	193	\$40,605	1.72	28	0.2%
Clothing and Clothing Accessories Retailers	163	\$24,051	1.00	22	0.2%
Hardware Retailers	145	\$38,461	4.63	21	0.9%
Automotive Parts and Accessories Retailers	139	\$37,780	1.92	16	0.6%
Pharmacies and Drug Retailers	97	\$54,842	0.77	11	0.5%
Remaining Component Industries	1,101	\$44,019	1.62	146	-0.2%
<b>Total Retail Trade</b>	<b>3,774</b>	<b>\$44,817</b>	<b>1.32</b>	<b>526</b>	<b>0.3%</b>

## Employment

The table below shows the major occupations within the broader retail sector. While demand remains relatively high for Retail Salespersons and Cashiers, some of the other occupations have seen decreased demand due to automation. While sector employment is slower-growing, sectors sales are up. Wages have also grown by 7.3% annually on average over the past decade (compared to 5.3% US average).

6-digit Occupation	Empl	Avg Ann Wages	Annual Demand
Retail Salespersons	813	\$41,900	124
Cashiers	683	\$38,500	125
Stockers and Order Fillers	414	\$43,700	74
First-Line Supervisors of Retail Sales Workers	319	\$57,200	30
Customer Service Representatives	95	\$45,200	12
General and Operations Managers	78	\$104,400	7
Fast Food and Counter Workers	77	\$37,200	18
Automotive Service Technicians and Mechanics	76	\$60,900	7
Laborers and Freight, Stock, and Material Movers, Hand	71	\$42,900	10
Parts Salespersons	60	\$41,100	7
Remaining Component Occupations	1,053	\$64,700	121
<b>Total</b>	<b>3,739</b>		

## Top Supply Chain Suppliers

As of 2024Q4, Retail Trade in Lewis County, Washington are estimated to make \$315.4 million in annual purchases from suppliers in the United States with about 27% or \$84.7 million of these purchases being made from businesses located in Lewis County. There may be an opportunity recapture some of the external spending by increasing local real estate ownership and facility management services.

6-digit Supplier Industries	Purchases from In-Region (\$M)	Purchases from Out-of-Region (\$M)
Residential Property Managers	\$12.7	\$21.0
Offices of Real Estate Agents and Brokers	\$8.9	\$18.5
Nonresidential Property Managers	\$0.6	\$12.3
Lessors of Nonresidential Buildings	\$4.3	\$6.5
General Warehousing and Storage	\$8.0	\$0.5
Remaining Supplier Industries	\$50.1	\$171.9
<b>Total</b>	<b>\$84.7</b>	<b>\$230.8</b>

## Arts, Entertainment and Recreation Sector

### Industry Subsector Presence

An estimated 365 people are employed in core Arts, Entertainment and Recreation subsectors. Although wages have grown 7% over five years, most jobs do not offer living wages. However, they do provide good entry and part-time options, as well as secondary jobs for many. The value of the sector is the revenue it generates by offering activities for locals and visitors alike. Fitness Centers is by far the largest sub-sector, and generates the most annual employment demand – primarily through turnover vs industry growth. With a location quotient of 2.31, Nature Parks has more than double the presence and impact on this sector in Lewis County than in other US communities on average. In addition to county operated trails and parks, Lewis County is home to Kinswa State Park, Lewis and Clark State Park, and Rainbow Falls State Park. These public parks bring tens of thousands of visitors to the county annually.

6-Digit Industry	Empl	Avg Ann Wages	LQ	Annual Demand	Forecast Ann Growth
Fitness and Recreational Sports Centers	131	\$15,151	1.00	23	1.4%
Independent Artists, Writers, and Performers	51	\$20,086	0.73	5	1.0%
Golf Courses and Country Clubs	46	\$29,284	0.59	8	1.2%
Nature Parks and Other Similar Institutions	32	\$55,497	2.31	5	1.7%
All Other Amusement and Recreation Industries	32	\$23,928	0.52	6	1.2%
Museums	30	\$36,809	1.50	4	1.7%
Other Spectator Sports	10	\$10,784	0.73	2	2.1%
Amusement Arcades	8	\$18,625	1.36	2	1.1%
Theater Companies and Dinner Theaters	7	\$19,068	0.50	1	1.0%
Promoters of Performing Arts, Sports, and Similar Events with Facilities	5	\$27,245	0.18	1	1.4%
Remaining Component Industries	11	\$17,665	0.17	1	1.4%
<b>Arts, Entertainment, and Recreation</b>	<b>365</b>	<b>\$24,414</b>	<b>0.59</b>	<b>59</b>	<b>1.4%</b>

## Employment

Some of the most common sector jobs are listed below. While industry wages are lower than average overall, certain occupations are outliers, particularly at the management level and for those operating as independent business ventures (Sole Proprietor, LLC, S Corp).

6-digit Occupation	Empl	Avg Ann Wages	Annual Demand
Exercise Trainers and Group Fitness Instructors	46	\$55,300	10
Amusement and Recreation Attendants	23	\$36,700	7
Writers and Authors	16	\$113,400	2
Coaches and Scouts	14	\$67,100	2
Landscaping and Groundskeeping Workers	14	\$45,500	2
Receptionists and Information Clerks	13	\$33,900	2
Musicians and Singers	10	\$71,400	1
Waiters and Waitresses	8	\$51,800	2
First-Line Supervisors of Entertainment and Recreation Workers, Except Gambling Services	8	\$59,100	1
General and Operations Managers	8	\$91,000	1
Remaining Component Occupations	179	\$79,500	28
<b>Total</b>	<b>339</b>		

## Top Supply Chain Suppliers

Over \$21 million in purchases are made in this sector annually. Almost two-thirds of those purchases involve funds leaving Lewis County. As the table below illustrates, much of this spending is associated with real estate purchases and rentals or, more specifically, non-local brokers and owners of recreational facilities located in Lewis County. Another considerable tranche of money is going to out of town promoters. In the future, the Lewis Economic Alliance might consider recapturing some of this exported capital through local ownership and business development initiatives.

6-digit Supplier Industries	Purchases from In-Region (\$000s)	Purchases from Out-of-Region (\$000s)
Residential Property Managers	\$876	\$581
Promoters of Performing Arts, Sports, Events with Facilities	\$364	\$957
Offices of Real Estate Agents and Brokers	\$613	\$574
Corporate, Subsidiary, and Regional Managing Offices	\$128	\$518
Nonresidential Property Managers	\$43	\$513
Remaining Supplier Industries	\$5,575	\$10,700
<b>Total</b>	<b>\$7,599</b>	<b>\$13,843</b>

## Accommodation and Food Services Sector

### Industry Subsector Presence

Over the last decade, overall Accommodation and Food Services sector employment volume has increased 2% and wages 4.9%. Two-thirds of all employment are in the Full and Limited Service Restaurant subsectors, and are also the primary sources of new employment demand.

RV Parks and Campgrounds have the strongest presence relative to other communities. Snack and Nonalcoholic Beverage Bars is the fastest growing subsector, likely due to the growth of recreational ball fields in Lewis County. Hotels are underrepresented as a subsector, yet employ 184 people.

Subsector wages are below the county average due to the strong presence of part-time jobs.

6-Digit Industry	Empl	Avg Ann Wages	LQ	Annual Demand	Forecast Ann Growth
Full-Service Restaurants	904	\$30,552	0.95	170	0.9%
Limited-Service Restaurants	895	\$23,664	1.09	182	0.9%
Snack and Nonalcoholic Beverage Bars	381	\$24,329	2.26	77	0.9%
Hotels (- Casino Hotels) and Motels	184	\$26,988	0.66	28	1.1%
Drinking Places (Alcoholic Beverages)	76	\$24,793	1.01	13	1.3%
RV (Recreational Vehicle) Parks and Campgrounds	41	\$26,589	5.97	6	1.0%
Food Service Contractors	31	\$31,740	0.28	5	0.7%
Caterers	24	\$15,110	0.66	4	0.8%
Recreational and Vacation Camps (- Campgrounds)	18	\$32,961	2.47	2	1.0%
Mobile Food Services	6	\$21,519	0.37	1	-0.3%
Remaining Component Industries	4	\$14,670	0.28	0	0.5%
<b>Accommodation and Food Services</b>	<b>2,565</b>	<b>\$27,112</b>	<b>1.00</b>	<b>480</b>	<b>0.9%</b>

## Employment

As shown in the table below there is considerable employment demand in this sector. Select occupations – such as waiting and bartending – can and do provide a living wage for certain workers (singles, students). But, like the other subsectors, Accommodation and Food Services generates a significant percentage of county and city sales tax revenue.

6-digit Occupation	Empl	Avg Ann Wages	Annual Demand
Fast Food and Counter Workers	852	\$37,900	215
Waiters and Waitresses	331	\$53,200	71
Cooks, Restaurant	227	\$43,600	42
First-Line Supervisors of Food Prep and Serving Workers	202	\$51,200	32
Bartenders	92	\$54,400	17
Cooks, Fast Food	88	\$37,900	12
Food Preparation Workers	83	\$42,200	15
Dishwashers	72	\$38,100	13
Hosts and Hostesses, Restaurant, Lounge, and Coffee Shop	63	\$39,300	16
Dining Room and Cafe Attendants and Bartender Helpers	59	\$40,300	12
Remaining Component Occupations	477	\$56,100	68
<b>Total</b>	<b>2,546</b>		

## Top Supply Chain Suppliers

This sector accounts for over \$220 million in annual purchasing. Three-quarters of those purchases are made outside of Lewis County. As with the Arts, Entertainment and Recreation sector, most of this involves property ownership and leasing. Notably, local hotels and other establishments purchase about \$3 million per year in cheese, all of which is apparently manufactured outside of Lewis County.

6-digit Supplier Industries	Purchases from In-Region (\$000s)	Purchases from Out-of-Region (\$000s)
Corporate, Subsidiary, and Regional Managing Offices	\$1,040	\$7,049
Residential Property Managers	\$3,348	\$4,122
Offices of Real Estate Agents and Brokers	\$2,342	\$3,743
Cheese Manufacturing	0	\$3,033
Nonresidential Property Managers	\$153	\$2,695
Remaining Supplier Industries	\$22,277	\$70,494
<b>Total</b>	<b>\$29,160</b>	<b>\$91,136</b>

## Tourism Strategic Plan Overview

Lewis County recently completed a strategic plan to guide development of and investments in the Tourism and Recreation Industry Cluster. Discover Lewis outlines three major goals: expand tourism offerings; support small enterprises; and enhance collaboration efforts among tourism entities. For planning purposes, the Plan identifies three unique visitor zones: east, west and north. The Plan also identifies target demographics and geographies for strategic marketing purposes, and present an inventory of countywide tourism assets. Implementation strategies include:

- Downtown redevelopment with a focus on main street-style look and feel
- Increased presence and marketing of boutique shops and dining
- More festivals and events
- Engaging community spaces and infill of vacant lots
- Development of mobility hubs with info kiosks, internet, and access to transportation
- New wayfinding system and plan
- Completing retail gap analyses for the larger cities and towns
- Adding more and diverse accommodation and lodging capacity
- Creating a guide program and guided tours of the county
- Developing a full-scale marketing and branding program
- Diversifying activities, working with influencers
- Creating a formal Lewis County Tourism Partnership organization
- Developing a tourism Ambassador Program
- Establishing a countywide Tourism Promotion Area (TPA) funded through lodging tax

## Other Special Considerations

### Lewis County Tourism and Recreation Strategic Plan

Lewis County partners recently completed a strategic plan for tourism. It outlines target strategies for growing key components of the Tourism and Recreation industry sector. Priority initiatives outlined above.

### Cultural Access Sales Tax (CAST)

Washington counties and cities are allowed to collect a Cultural Arts Access tax. The CAST would raise the local tax by 0.1 percent, or about one penny for every \$10 spent. Allowed fund uses include, but not limited to: underwriting or sponsoring tickets to events and places for low-income children and seniors; creating new cultural arts programming (at schools, parks, et al); providing free transportation to events; offering free days at museums and other venues; installation of capital projects. Additional study would be required to determine if CAST is viable in Lewis County or its local municipalities and, if so, what amount of revenue might be expected annually. It is noted here because it offers a unique opportunity to fund and implement certain components of the Tourism and Recreation Strategic Plan.

### Business Training and Technical Assistance

Through a partnership between Washington State Department of Commerce and Thurston EDC, existing and prospective business operators can access a range of business training and development programs, at low or no cost. Training topics include, but are not limited to: start up, business expansion, marketing, finance and accounting, market sourcing, and more. The Alliance participates in this venture, but could develop new pathways for businesses interested in developing or expanding tourism-based operations.

### Pacific-Salish Economic Development District

Lewis County operates as its own Economic Development District (EDD), eligible for federal grants related to infrastructure, technical assistance and other economic development initiatives. In the future, Lewis County might evaluate joining the Pacific-Salish EDD which includes Thurston, Mason, Grays Harbor and Pacific Counties. Over time, the government has tended to prioritize funding applications that serve a broader region (and congressional districts). All of the other counties have prioritized tourism infrastructure-related project for future funding requests, potentially making this an ideal partnership.