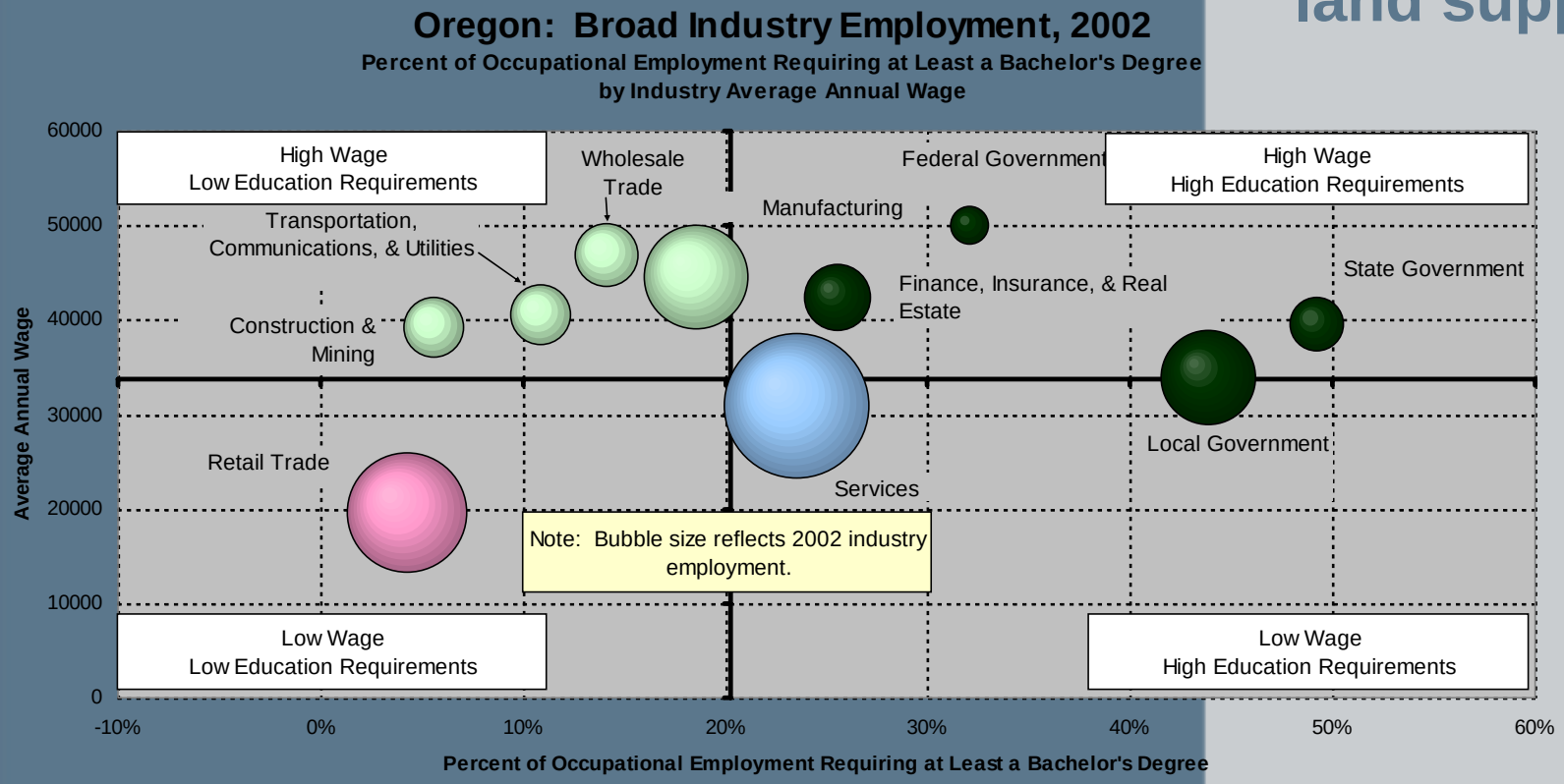
INDUSTRIAL DISTRICTS ATLAS

2004

PORTLAND, OREGON

Industrial Districts Matter

1. Good jobs
2. Traded sector land supply



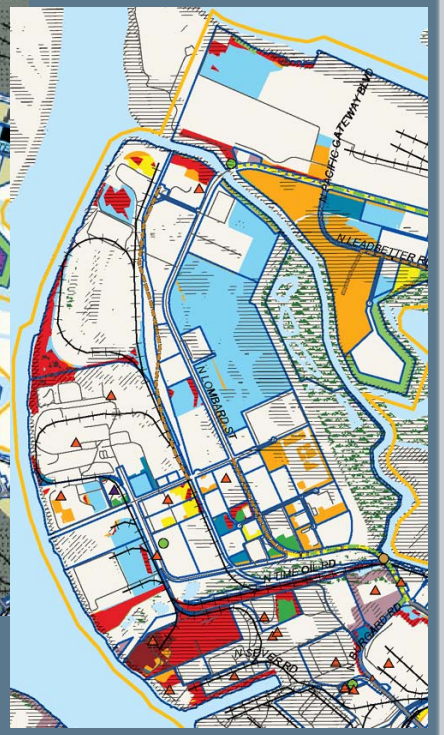
Source: Industry and Occupational Forecasts, 2002-2012; Industry w age data is from Covered Employment and Wages.

FORWARD

Data as Economic Development

Largest employers

Facility types



Growth Capacity

15,500 acres of industrial land in 8 districts

Data definitions matter

Potential future research:

- **Regional context**
- **Trends analysis**

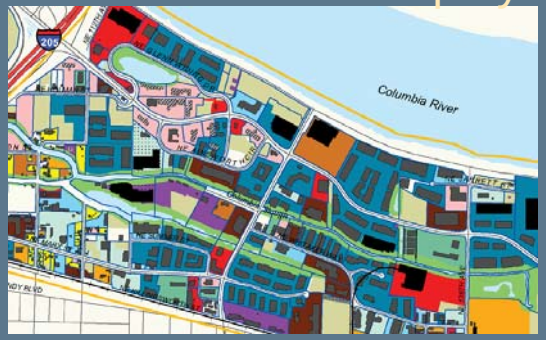
METHODOLOGY

How Districts Differ

A TYPOLOGY OF DISTRICTS

Freight hub districts

Mixed Industrial/Employment districts



Dispersed areas

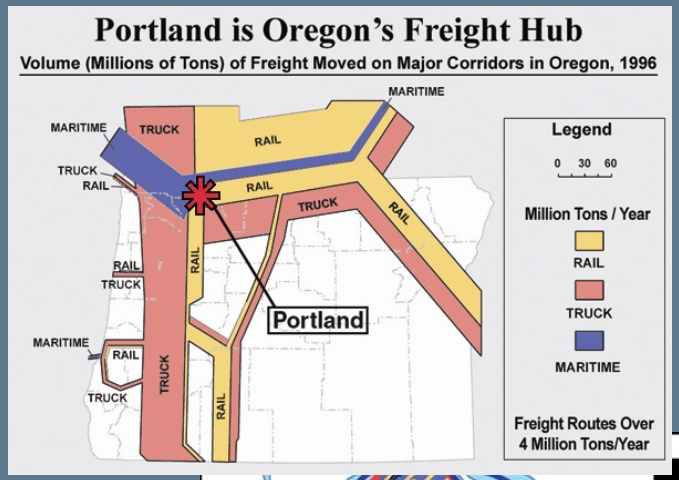
District types:

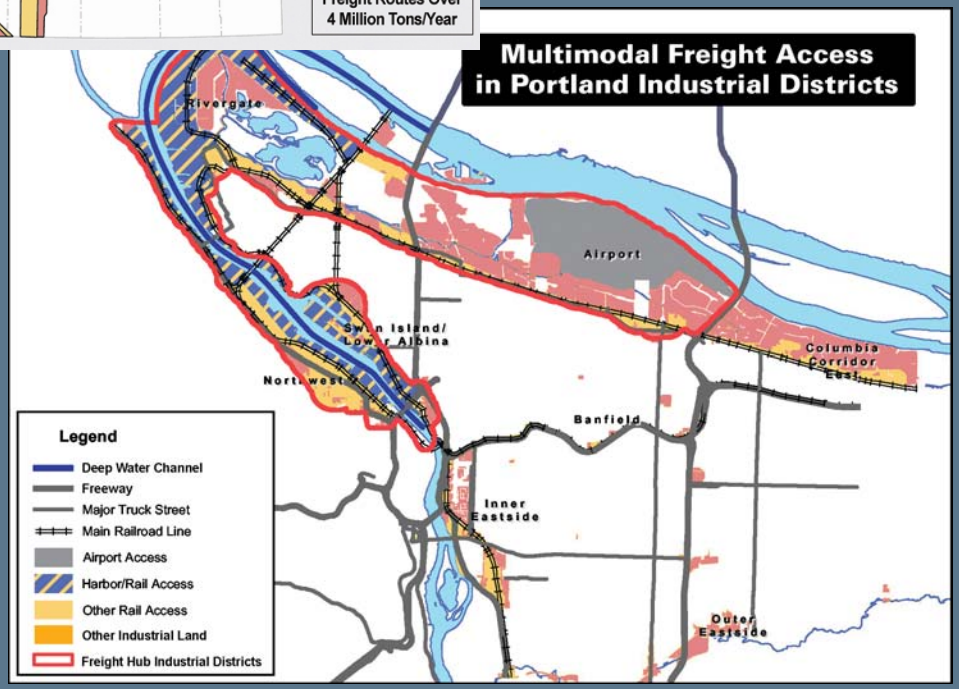
- Freight hub districts
- Mixed industrial/ employment districts
- Dispersed areas

Implications:

- Industry mix, land use, & infrastructure are interrelated
- Districts reveal city economic structure

Freight Hub Districts





- A West Coast freight hub concentrated in 4 districts
- 57% of land has harbor, rail, or runway access
- 56% of occupied land in heavy industrial use
- Leading sectors: transportation, manufacturing

Mixed Industrial/Employment Districts

Flex space in Columbia Corridor East

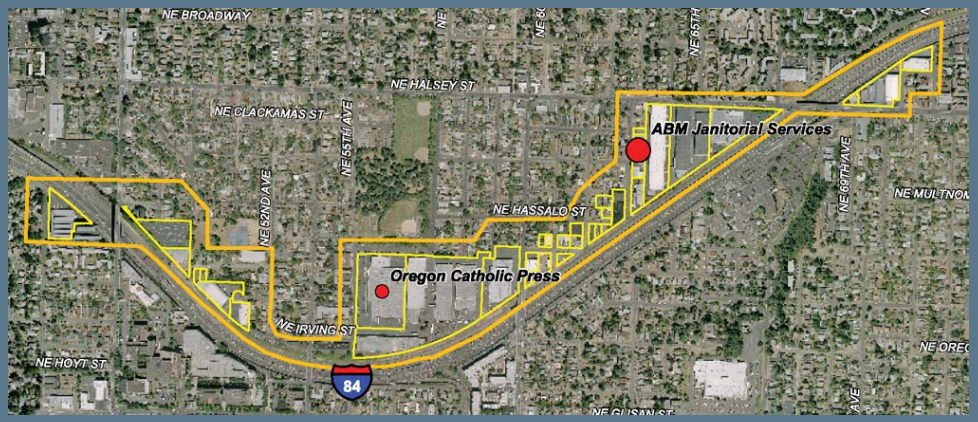
Urban street in Inner Eastside

Services are leading sector: 45% of area jobs

High job density: 25 jobs per occupied acre

Juxtaposition of Inner Eastside and Columbia Corridor East

Dispersed Areas



Part of Banfield District

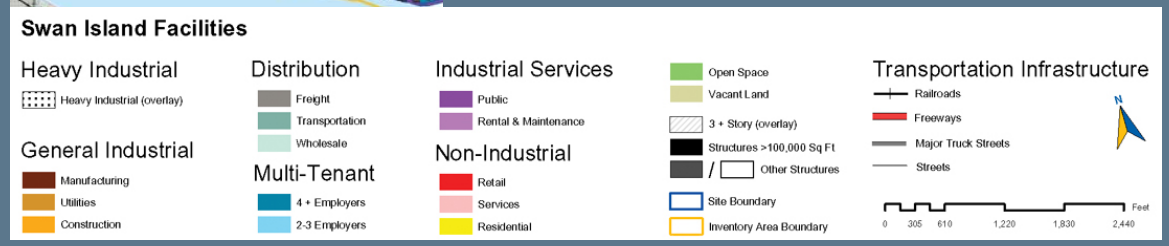
Part of Outer Southeast District

- Small areas along I-84, I-205, & Johnson Creek
- Fit into larger neighborhoods
- Grouping of metals manufacturers

A TYPOLOGY OF DISTRICTS

Industry Mix

	101,000 Jobs	1,260 Occupied Acres
Production	34%	17%
Distribution	34%	57%
Terminals		32%
Services	32%	17%
Multi-Tenant		18%



Mix of industries varies if measured by jobs or land area

Freight terminals are land-intensive, but are also anchors of freight hub districts

Non-industrial acres

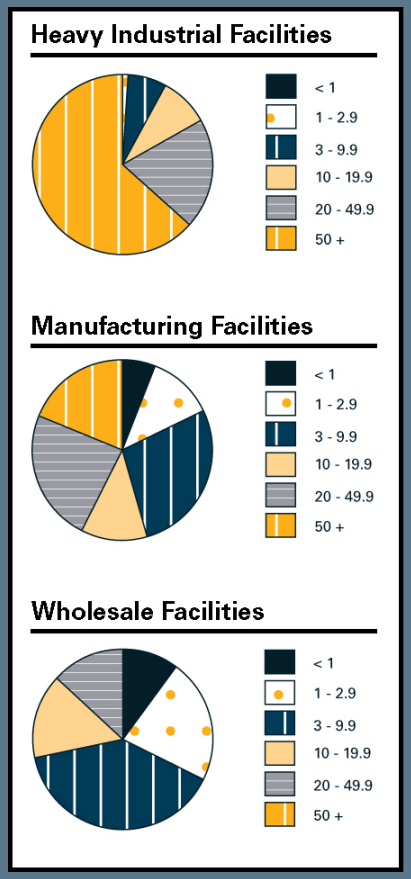
- **Industrial zones – 5%**
- **General Employment zones – 37%**

Which sectors need industrial land?

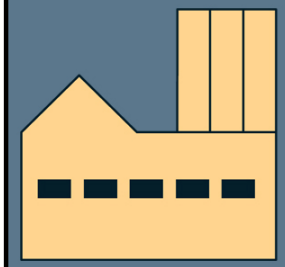
- **84% of manufacturing jobs are in industrial districts**
- **75% of distribution jobs**

Site & Structure Size

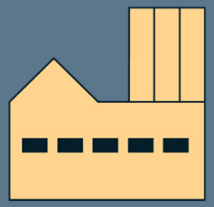
Site Size



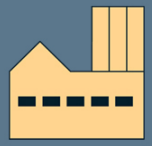
Structure Size



189,000 sf.



60,000 sf.



36,000 sf.

Industrial facilities are diverse

Outdoor use is not under-use:

- **Average site coverage is 25%**
- **Average outdoor area in heavy industrial sites is 20 acres**

Labor, Land, & Infrastructure

Measurable indicators of district competitiveness:

Labor access

- Central access to 1 million metro workers

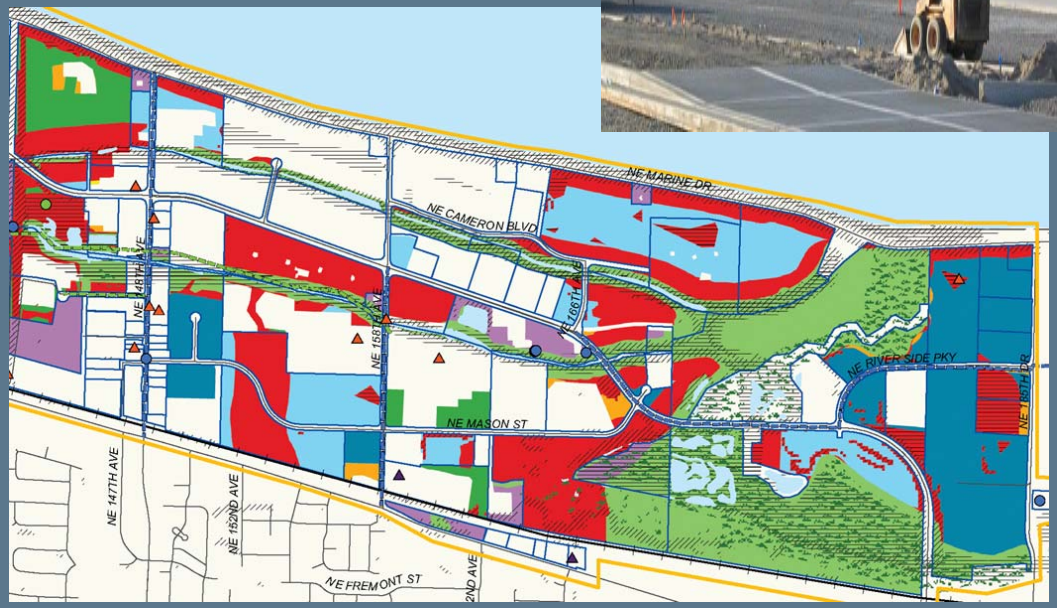
Industrial land supply

- Compatibility – 5% of land in non-industrial use
- $4.70 per square foot average land value

Freight access

- 79% of land is within 3 miles of freeway ramp
- 33% has rail access
- 22% has harbor access

How Much Vacant Land?



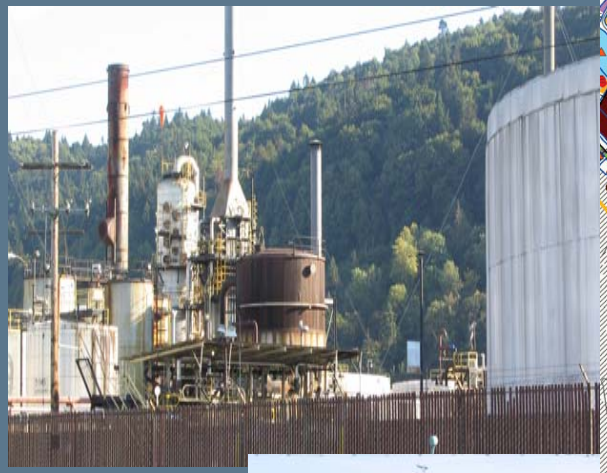
3,900 vacant acres
- open space
- public/utility sites
= 2,900 acre supply

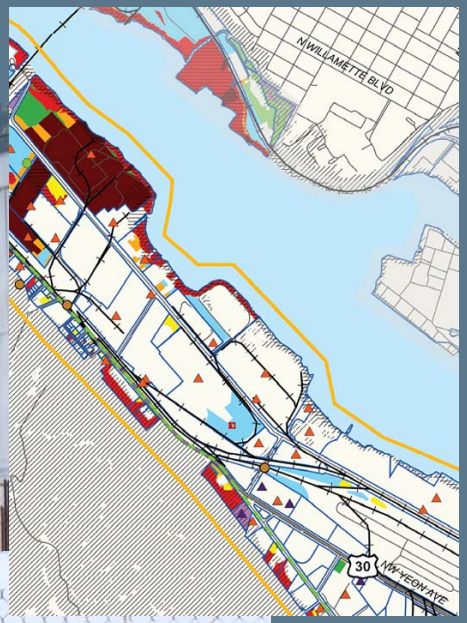
25-year demand
= 1,900 gross acres

Site constraints create policy challenges:

- **1,100 of 2,900 acres is "partly buildable" (e.g., floodplain, habitat)**
- **900 of 2,900 acres is brownfield**

How Much Land in Brownfields?





Potentially 8% of industrial land:

- 320 acres on unoccupied sites
- 920 acres of vacant land (unimproved)
- Many caveats

Emerging challenges:

- Easier recycling of industrial land
- Using land more efficiently

More research, tools, and incentives are needed

Looking to the Future

As regional industry grows, what should the urban core districts strategically evolve toward?

How do we get there?

Projects underway

- Willamette Industrial Urban Renewal Area
- Freight Master Plan
- Harbor planning
- Regional strategies

Emerging directions

- Brownfield recycling
- Short-term land supply
- Catalyst infrastructure
- Workforce development
- New financial resources
- Regulatory improvements

NEXT STEPS

QUESTIONS

The Industrial Districts Atlas is available at www.portlandonline.com/planning