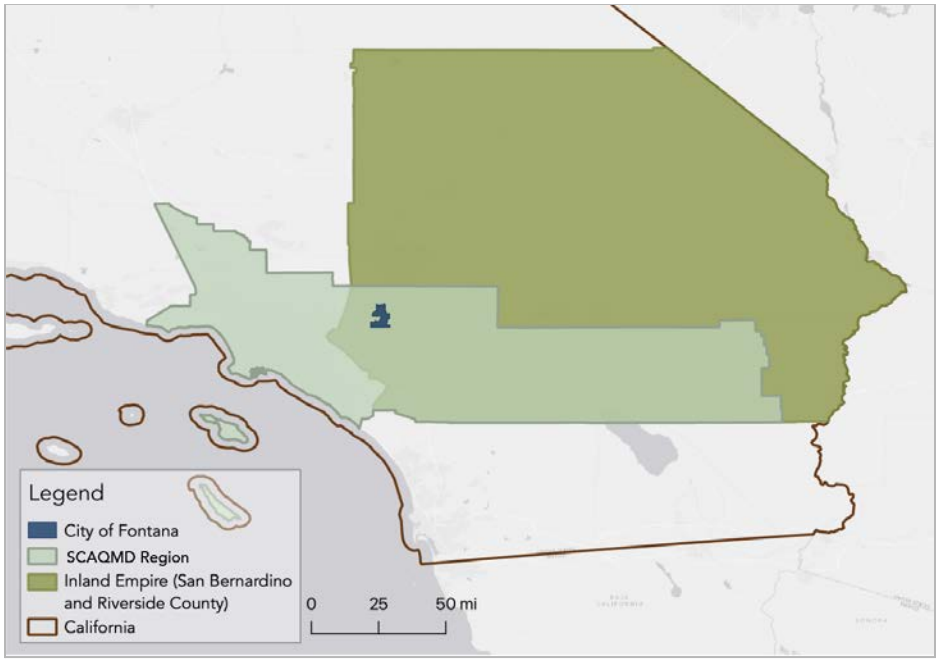
Overview of Fontana & The Inland Empire

Defining the Inland Empire

While the Inland Empire may be defined differently when considering various social, economic, political, geological, or governance boundaries; for the purposes of this report, we refer to the 'Inland Empire' as San Bernardino and Riverside Counties (Figure 1.01), an area of approximately 27,000 square miles (Shearer, Shah, and Gootman 2019). Throughout the region's history, it has also been home to a multitude of interrelated indigenous communities whose land ownership overlapped geographically (Figure 1.02). The history section in the subsequent pages will provide more detailed insight into the land ownership changes which have occurred throughout the region's history.

Figure 1.01: Contextualizing Fontana within the Inland Empire and SCAQMD Region

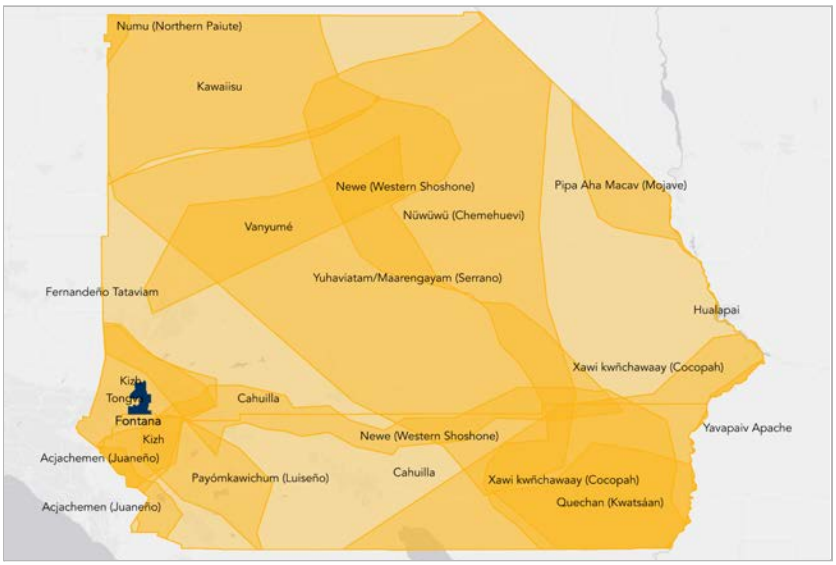


Source: Author generated utilizing data from California's Open Data Portal (https://data.ca.gov/dataset/ca-geographic-boundaries)

The City of Fontana, shown in blue in Figure 1.03 is home to approximately 215,000 people and is approximately 42 square miles. With its rapidly growing population, Fontana has become the second largest city in San Bernardino County and 19th largest city in the State of California (City of Fontana 2018). The City is also located approximately 65 miles from the

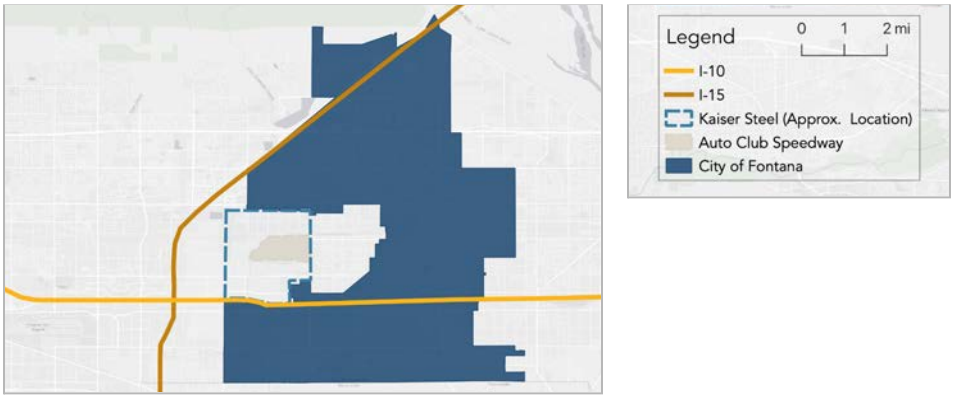
Ports of Long Beach and Los Angeles, making it an accessible industrial and warehousing center for goods traveling from across the Pacific and inland. As shown in Figure 1.03, the City of Fontana is uniquely positioned between Interstate 10 and Interstate 15, which provides the City with abundant automotive options and access. An area just west of Fontana's most populated downtown core is unincorporated (shown in grey in Figure 1.03). This unincorporated land, surrounded by the City of Fontana on three sides, used to be Kaiser Steel's headquarters, but it is now home to the Auto Club Speedway and residential uses. The demographics of both Fontana and the region will be discussed in more detail later in this chapter and throughout the report.

Figure 1.02: Map of Native Land Ownership Across the Inland Empire



Source: Author generated from Native Land Digital (https://native-land.ca/)

Figure 1.03: Overview Map of Key Landmarks & Highways in Fontana



Source: Author generated utilizing data from California's Open Data Portal (https://data.ca.gov/dataset/ca-geographic-boundaries)

Demographics

To better understand the impact of the warehousing industry on Fontana, CA, we start by delving into demographic data for the city and the surrounding region. Additionally, we include the surrounding county of San Bernardino, the unincorporated part of Fontana (Kaiser, CA[1]), and the nearby city of Los Angeles as comparison geographies in our figures. Because of Kaiser's entwined history with Fontana as the historical location for the Kaiser Steel mill, with the mill being the original reason for the city's development, and since Kaiser is within Fontana's sphere of influence, it is important to understand the demographics within Kaiser too.

Figure 1.04: Demographics of Fontana, CA, Kaiser, CA, and San Bernardino County, CA

(a) Population and race/ethnicity data. Other than for '2+' (two or more races), all of the racial categories under 'Non-Hispanic' only include people who only selected a single race in the census form. Uncertainties not shown for San Bernardino County, CA because the US Census Bureau does not provide margins of error for these controlled estimates. Universe: total population.

		race and ethnicity (%)					
		Non-Hispanic					
	population	White	Black	Asian	other	2+	Hispanic
Fontana, CA	208 943 ± 92	13.8 ± 0.8	8.1 ± 0.7	6.1 ± 0.5	0.6 ± 0.2	2.1 ± 0.4	69.3 ± 1.2
Kaiser, CA	39 818 ± 1541	6.4 ± 1.2	4.1 ± 1.4	1.6 ± 0.7	0.6 ± 0.6	0.3 ± 0.2	87.1 ± 5.2
San Bernardino Co, CA	2 135 413	29.2	7.9	6.8	0.8	2.4	52.8
Los Angeles, CA	3 959 657 ± 108	28.5 ± 0.1	8.6 ± 0.1	11.5 ± 0.1	0.7 ± 0.0	2.2 ± 0.1	48.6 ± 0.1

(b) Median household income (universe: households), education attainment (universe: population above 25 years), and percentage of occupied housing that is owner-occupied (universe: occupied housing units). The median household income for Kaiser is calculated as the mean of the median household incomes for the five census tracts comprising Kaiser.

	household income	education attainment	housing
	median ($)	bachelor's or above (%)	owner occupied (%)
Fontana, CA	70 800 ± 1800	17.1 ± 0.1	64.6 ± 1.8
Kaiser, CA	56 700 ± 5500	8.7 ± 1.4	61.1 ± 3.6
San Bernardino Co, CA	60 200 ± 600	20.3 ± 0.3	59.3 ± 0.5
Los Angeles, CA	58 400 ± 500	33.7 ± 0.2	36.8 ± 0.3

Uncertainties are margins of error at % confidence level. Source: ACS 2019 5-year estimates, tables B03002, B15003, and B25003.

The population of Fontana and Kaiser are approximately 210,000 and 40,000 respectively. Fontana and Kaiser, at 69.3% and 87.1% Hispanic respectively, are markedly more Hispanic than San Bernardino County (51.8% Hispanic) or Los Angeles (48.6% Hispanic). Fontana, Kaiser, San Bernardino, and Los Angeles' median household income are all within the range

[1] Kaiser is defined here as the five census tracts of 23.04, 24.01, 24.02, 25.01, and 25.02 within San Bernardino County, CA. Note though that there are minor overlaps between these census tracts and the incorporated city of Fontana, CA. The overlap happens even at the census block group level and is thus unavoidable for analyses using the US Census' publicly available American Community Survey (ACS) data.

of $56,000-71,000. However, the percentage of people with Bachelor's degrees or above for Kaiser is only 8.7%, compared to 17.1% for Fontana, 20.3% for San Bernardino County, and 33.7% for Los Angeles. Approximately 60% of the housing units in Fontana, Kaiser, and San Bernardino County are owner occupied.

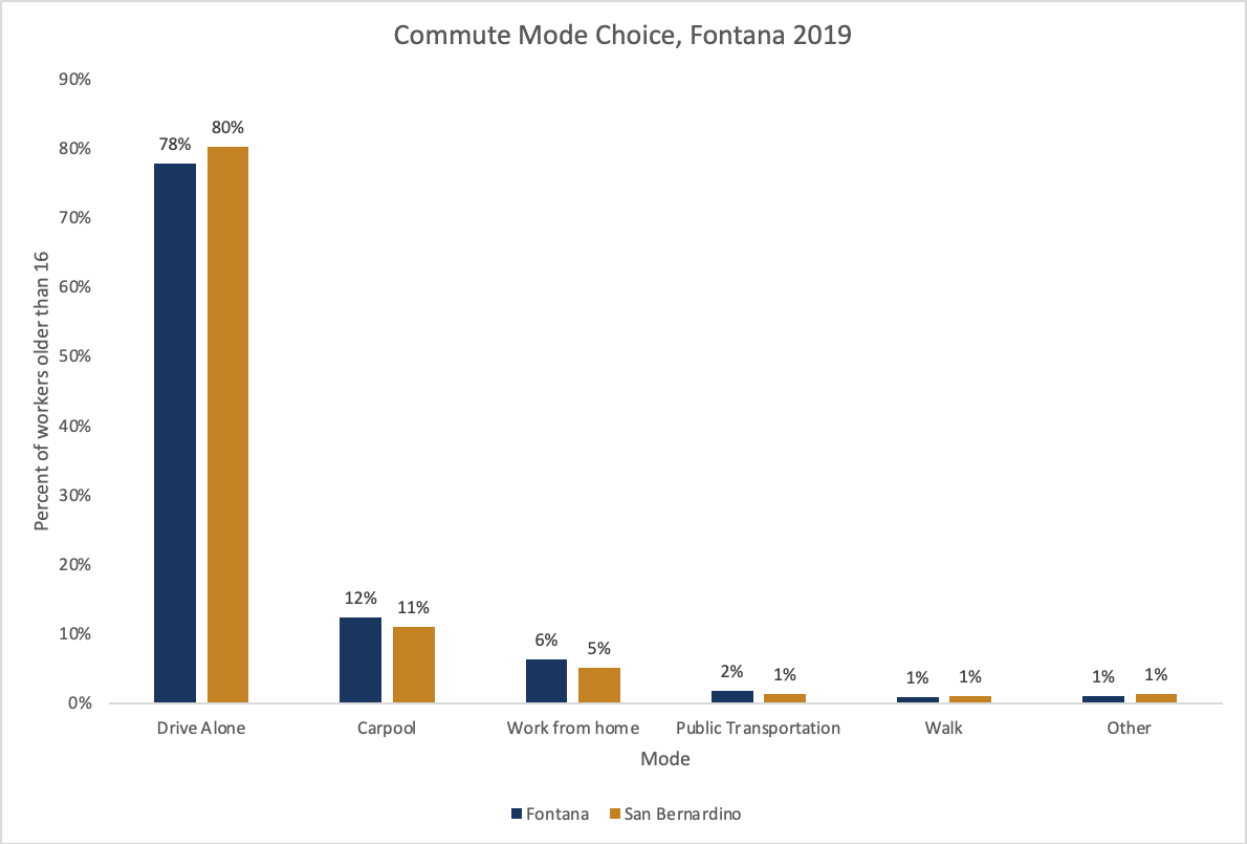
Figure 1.05: Percentage of workers who work in the transportation and warehousing industry for Fontana, CA, Kaiser, CA, San Bernardino County, CA, and Los Angeles, CA.

Universe: Civilian employed population 16 years and over. Uncertainties are margins of error at % confidence level. Source: ACS 5-year estimates, table C24030.

Figure 1.05 shows the importance of the transportation and warehousing industry to the Fontana area. 11.3% and 18.4% of the population in Fontana and Kaiser, respectively, work in the transportation and warehousing industry. Note the extremely high figure for Kaiser, where nearly 1 in 5 workers work in the transportation and warehousing industry. These are much higher percentages than that of the surrounding San Bernardino County (8.7%), which is in turn double that of the city of Los Angeles, CA (4.4%).

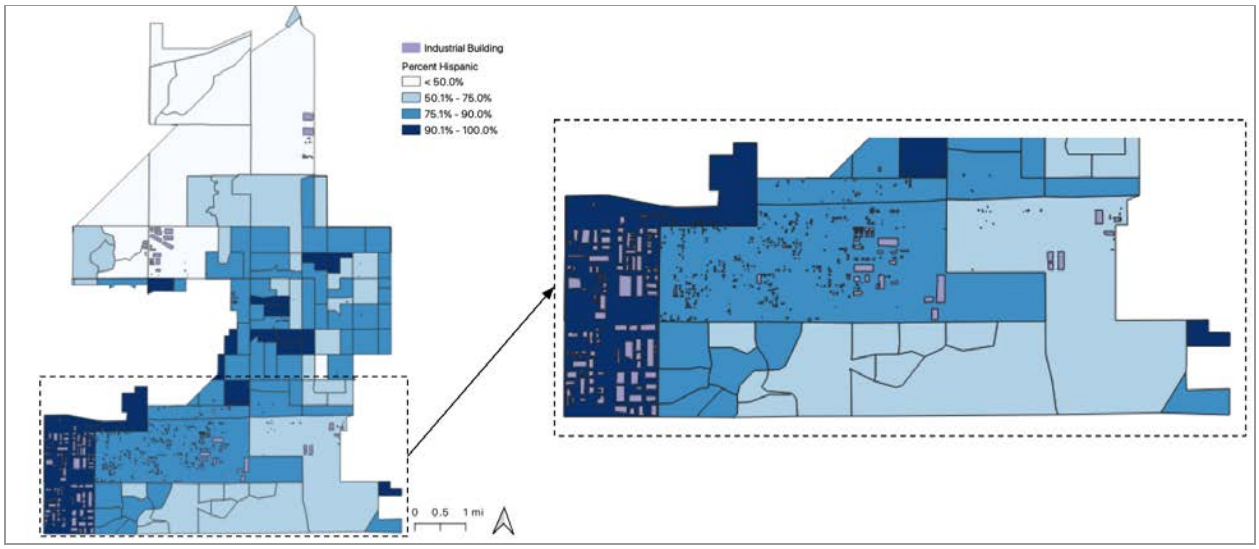
As seen in Figure 1.06, most residents in Fontana commute by car, with 78% driving alone and another 12% carpooling. Less than 5% of Fontana residents commute by public transportation or other active transportation modes like walking. These numbers are similar to that of San Bernardino County.

Figure 1.06: Commute Mode Choice in Fontana, 2019



Source: ACS 5-year estimates, table C24030.

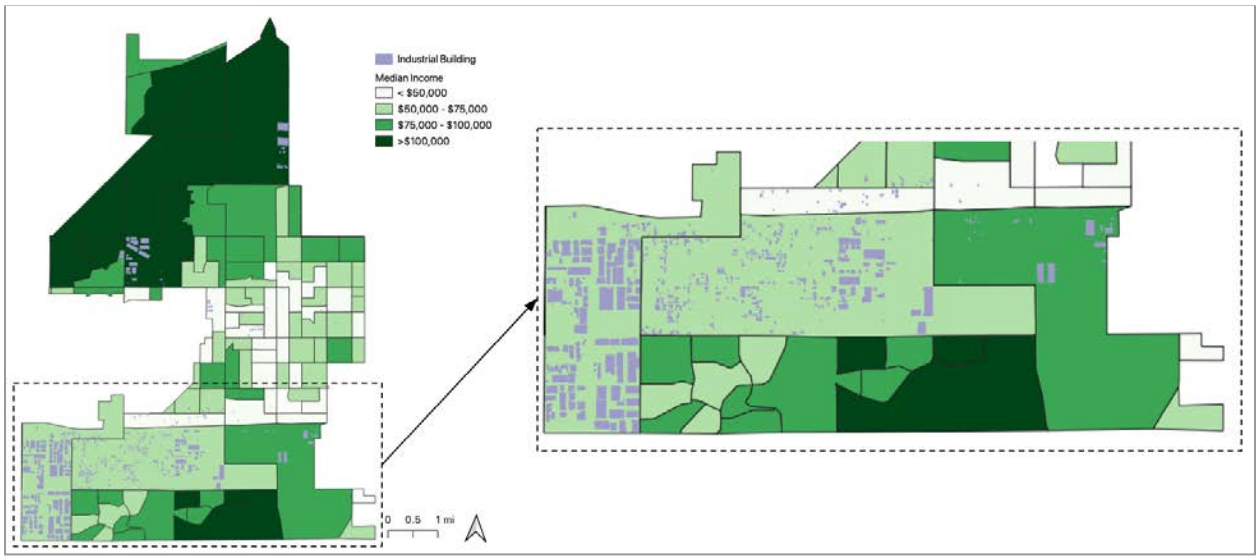
Figure 1.07: Hispanic Households and Industrial Buildings in Fontana



Source: Author generated from ACS 2019 5-year estimates and using data downloaded from *2016 Land Use Information for San Bernardino County*, *Microsoft/USBuildingFootprints* [2018] 2021

There is a higher concentration of Hispanic residents in central Fontana and the southwest portion of Fontana, where most of the warehouses are located.

Figure 1.08: Median Household Income and Industrial Buildings in Fontana

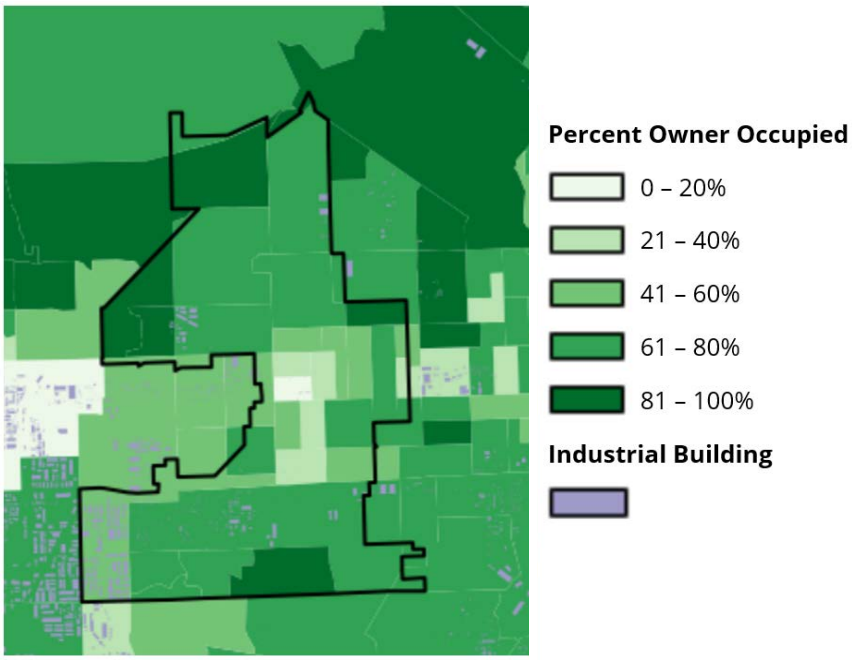


Source: Author generated from ACS 2019 5-year estimates and using data downloaded from *2016 Land Use Information for San Bernardino County*, *Microsoft/USBuildingFootprints* [2018] 2021

Household income in Fontana is the highest in the newer subdivision developments in the northern part of Fontana and in the south near Jurupa Hills. The area where most of the warehouses are located have a lower residential household income, and central Fontana has the lowest household income in the city.

A majority of Fontana's housing units in the areas north of downtown and in the southernmost subdivisions are owner occupied. Central Fontana has several census block groups with an extremely low rate of owner occupied housing (less than 10%), probably due to the existence of larger scale rental developments in these areas. Notably, the large census block group spanning most of south Fontana, which is where a lot of new warehouses are being built, has a lower homeownership rate than surrounding areas at 49%. While new warehouses may provide new or improved infrastructure including paved roads and sidewalks through the development process, property value increases from infrastructure improvements do not necessarily accrue to current Fontana residents, especially since industrial growth is concentrated in city neighborhoods with a high percentage of renters. These renters are likely to experience the disbenefits of industrial development, without experiencing any financial gain. The rise in property values may also drive up rents, displacing the current residents from Fontana.

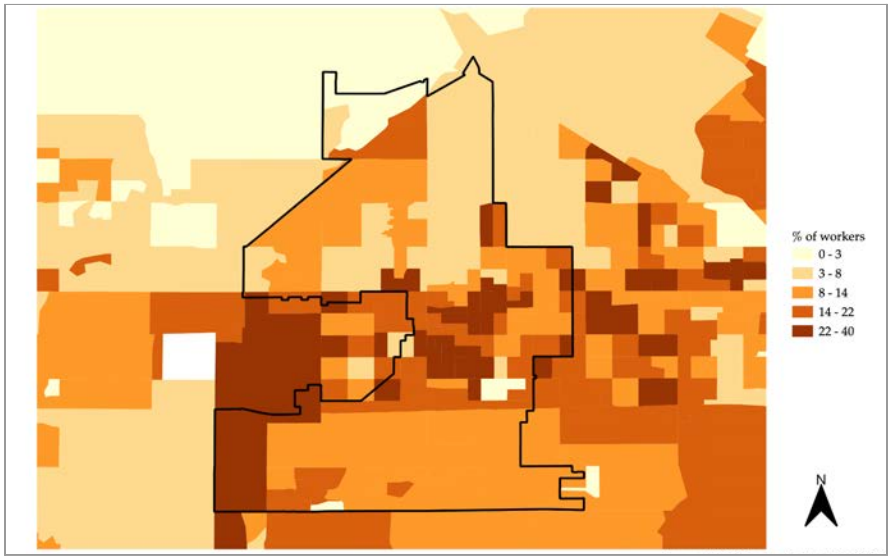
Figure 1.09: Housing Tenure in Fontana



Source: Author generated from ACS 2019 5-year estimates and using data downloaded from *2016 Land Use Information for San Bernardino County*, *Microsoft/USBuildingFootprints* [2018] 2021

A higher percentage of workers work in the transportation and warehousing industries in south Fontana than north Fontana, with the highest concentrations of transportation and warehousing workers in central Fontana.

Figure 1.10: Percentage of Workers in the Transportation and Warehousing Industry in Fontana



Source: Author generated from ACS 2019 5-year estimates.

History of Fontana

1770s - 1850s: First Spanish Missions Arrive (Inland Empire)

While the Spanish Crown had claimed the Pacific Coast of North America in the mid-16th century, efforts to occupy Southern California were not made until the 1760s. Before the Spanish invasion in the late 1760s, Southern California was home to a linguistically and culturally diverse set of indigenous communities comprising over 43,000 people. While these native communities remained relatively independent and self-sustaining, "they were intimately interrelated with regard to the reproduction of social relations and cultural practices" (Patterson 2015). These native communities used an array of resource management practices to sustain their lifestyles, and as a result, the landscape of the Inland Empire was highly manicured by the time the Spanish missionaries arrived. Although the Inland Empire is defined today by San Bernardino and Riverside Counties, the lands belong to a set of unique indigenous communities including the nations of the Payómkawichum, Cahuilla, Tongva, and Kizh people. Today, the City of Fontana sits on the native land of the Tongva and Kizh people (Native Land Digital 2021). The Spanish invasion which occurred at the end of the 1760s was characterized by resource depletion, the introduction of invasive species, and religious conversion both in Fontana and across the region. The process of conversion and the forced movement of native communities to the missions severely disrupted and harmed native communities' social relationships, health, and production relations as land ownership changed (Patterson 2015).

1850s - 1906: Fontana Develops as a Rural Pioneer Community; the San Pedro Bay ports complex grows

It was not until the arrival of the first Mormon settlers to San Bernardino County in the 1850s that the region began to develop as an agricultural center. Shortly thereafter, a series of irrigation canals sparked a real estate boom in the Inland Empire. By the 1890s, there were three railroad companies -- the Southern Pacific, the Union Pacific, and the Atchison, Topeka, and Sante Fe -- which connected communities across Southern California to the Inland Empire (Patterson 2015).

Rail was not the only path-altering investment of the era. Looking to expand America's 'gateway' to countries across the Pacific, local government officials, the Army Corps of Engineers, and entrepreneurs laid the groundwork for Southern California's logistics industry by expanding local ports. The San Pedro Bay ports of Los Angeles and Long Beach,

like most of the area coastline, were too shallow. With the construction of the largest-to-date hydraulic dredging ship in 1903, officials deepened the bay. This massive investment -- $100,000 alone for the ship – spurred further capital investment in dredging from localities and private entities up and down the coast as well as land speculation on future port infrastructure (Tejani 2014).

1906 - 1942: Fontana Becomes a Center for Agriculture

In 1906 A.B. Miller, a major early developer in the region, bought 28 square miles of land in San Bernardino County and constructed a vast irrigation system. This irrigation system bought water from Mount Baldy to support what would become a combination of industrialized plantations called Fontana Farms and small self-starter farms for prospective 'Fontanan' residents. These model small farms were sold to individuals (as little as 1.5 acres for a starter farm), and gradually, purchasers would move from farming on the weekends to building live-in quarters. Through this venture, the region became home to many citrus trees, walnut trees, and grapevines (Davis 2006). While the trees matured, A.B. Miller encouraged residents to participate in poultry and pork production. As Mike Davis writes in *City of Quartz*, "This famous 'Partnership of Hens and Oranges' was intended to stabilize the small tree rancher through the vagaries of frost and cashflow, while simultaneously guaranteeing the Fontana Company its installment payments. Ideally, it was supposed to allow the retired couple with a modest pension, the young family with rustic inclinations, or the hardworking immigrant the means to achieve a citrus-belt lifestyle formerly accessible only to the well-to-do" (Davis 2006). By 1930, the Fontana Company had subdivided over 3,000 starter farms, half of them being occupied full-time. This approach to development and agricultural production was successful even through the Great Depression as the region continued to develop as a major poultry and citrus center (Davis 2006).

1942 - 1983: Kaiser Steel Mill Brings Steel Manufacturing; Containerization comes to the San Pedro Bay Ports Complex

During World War II, Fontana transitioned from an agricultural center to become a center for wartime manufacturing. Henry Kaiser, who had before run a shipyard out of Oakland, relocated Kaiser Steel to Fontana in 1942 due to the presence of affordable power, abundant rail connections, and "weak claims of local government" in the unincorporated land adjacent to Fontana (Davis 2006). With a $250 million loan from the Reconstruction Finance Corporation (RFC), the steel mill went into production quickly to meet wartime demand. Kaiser promised the steel mill would not disrupt the region's agricultural industry and would bring a surplus of taxes, however neither of these promises were met. Within

the first year of production, farmers were noticing that the high sulfur content from the coal had detrimental effects on the wellbeing of the region's citrus as well as air quality. However, without significant taxation and with unionized workers trained to construct ships in just a number of days, Kaiser steel was producing ships faster than was previously thought possible just two years later in 1944 (Davis 2006).

As the war came to an end, Kaiser began to develop business ventures in non-wartime markets, as he predicted that personal savings and productivity advances achieved through the war would spur mass consumerism. With experience building workforce housing for his steel and shipyard workers, Kaiser began creating prefabricated homes to meet post-war housing demands. The changing of presidential administrations after the war in 1946 also highlighted the precarity of Kaiser Steel due their inability to refinance the RFC loan; however, the Korean War shortly thereafter caused an increased demand for steel and shipbuilding. Kaiser Steel soon went public, diversifying its market with the newfound access to capital. At the same time, high demand for workers quickly created housing shortages, leading early Fontana farmers to feel pressure from prospective housing developers (Davis 2006). This pressure caused the first housing boom in the region.

By the late 1970s, with steel prices collapsing, Kaiser Steel was suffering. Additionally, with this steel production, "Fontana had emerged as the literal epicenter of air pollution in Southern California, and Kaiser Steel's huge plume of acrid smoke became indissolubly linked in the public mind with the smog crisis in the Inland Empire" (Davis 2006). As a result, Kaiser Steel was forced to sign a consent decree with the Southern California Air Pollution Control Board, requiring them to spend $127 million to reduce pollution. This mandate is partially to blame for the collapse of the steel mill which laid off more than 4,500 workers in the early 1980s (Bernick 2018).

Kaiser Steel was just one of many manufacturing operations in Southern California during and after World War II. With the growth of manufacturing came increased corporate need for shipping. Wartime innovations (and leftover war ships) pushed companies to create the modern shipping container, dramatically increasing the efficiency of goods movement. The first container ship, owned by Matson, sailed through west coast ports in 1958 (Levinson 2016).

Containers were a vast departure from the 'breakbulk' work that historically happened at ports, where skilled longshoremen expertly unpacked goods from ship-hulls so as not to capsize the ship, then repacked them to go elsewhere. The use of containers required less

sorting at the ports under the purview of the International Longshore and Warehouse Union (ILWU) (De Lara 2018).

Shipping containers also changed how labor interacted with shipping. Particularly in the Ports of Los Angeles and Long Beach, before the advent of containers, the ILWU strictly enforced hard-fought union rules about how many members were needed for specific tasks; though some protections were superfluous, they protected jobs. Containers prompted a renegotiation of labor protections, resulting in the Mechanization and Modernization Agreement. Shipping companies agreed to pay $5 million per year into a fund for wages and retirement benefits in exchange for ending many of the staff-minimums and goods weight maximums, for the length of the contract. Notably, Long Beach and Los Angeles locals did not vote to approve the Mechanization and Modernization Agreement, but it passed without their support (Levinson 2016).

Even though the use of containers remained very low into the 1960s -- containers made up 2% of cargo in west coast ports by 1962 -- preparation for containers remained a priority for the San Pedro Bay ports complex as Pacific ports vied for corporate attention. Voters in Los Angeles approved financing millions in port improvements in the late 1950s and early 1960s, and Long Beach unintentionally lowered their port floor by pumping oil deposits from under it, thereby making it more competitive. Container and port development was timed perfectly for the massive flood of people and materials needed to be shipped to continue the Vietnam War; Southern California was the manufacturing hub of the west, and business at its ports reflected that (Levinson 2016).

As container use grew, so did its land use footprint. Shipping companies prized land adjacent to the ports for container storage, pushing historic warehouses inland onto agricultural areas along Southern California highways (Patterson 2015).

1983 - 2009: Fontana Becomes a Bedroom Community for Los Angeles

As the fortunes of Kaiser Steel waned in the 1970s and 1980s, landowners and city officials transitioned the region into a bedroom community for Los Angeles. Policies to waive city fees, enable tax rebates, and implement tax exempt bonds made Fontana an extremely attractive place for developers to build homes. For example, the developers of the Village of South-ridge -- the city's first greenfield master planned development -- convinced city leaders that they could recreate a famous Irvine master planned community in Fontana if they waived many of the infrastructure costs developers typically are responsible for. Due to development-friendly decisions like this, the population of Fontana grew from

approximately 35,000 to 70,000 in the seven years between 1980 and 1987. During this time, the Fontana Redevelopment Agency also began uprooting the remaining agricultural land south of I-10 to develop the Southwest Industrial Park, an area of the city that is home to many manufacturing and warehousing facilities today. Fontana, which sits at the intersection between I-10 and I-15, was strategically positioned to house commuters working in Los Angeles as well as goods traveling inland to the rest of the country from the Ports of Los Angeles and Long Beach (Davis 2006).

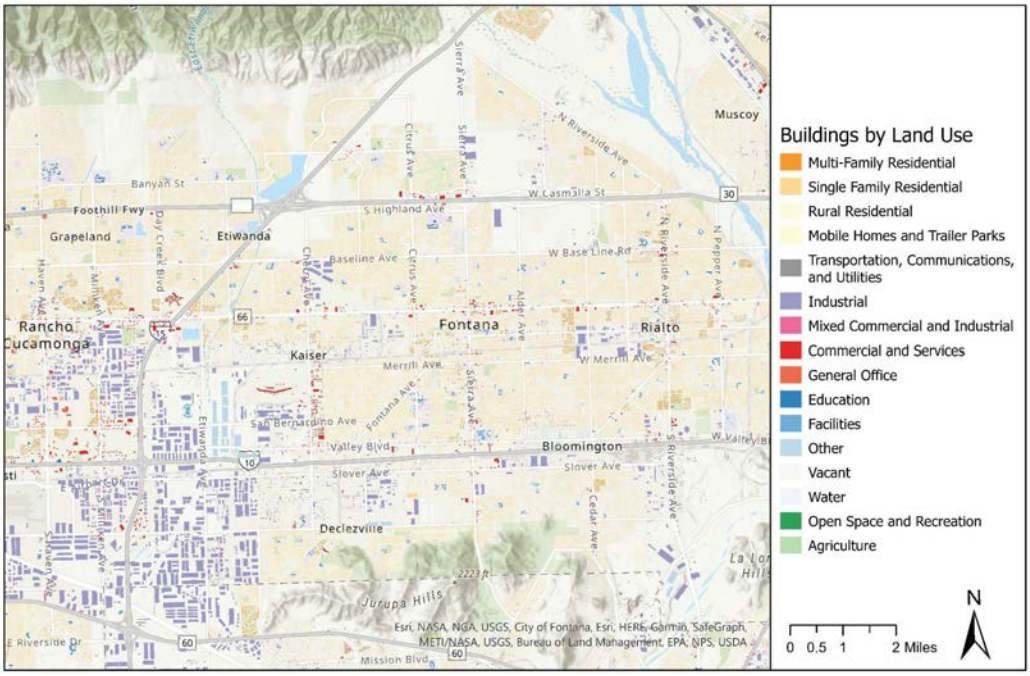
Post Great Recession: Fontana Today - Logistics and Manufacturing Services

Although Fontana remains a bedroom community, warehousing and logistics have developed a strong foothold in Fontana and drive a significant portion of local economic activity and city tax revenues. As the volume of goods at the Ports of LA and Long Beach increased, and as the Inland Empire searched for jobs to replace those that had been lost with the Kaiser Steel Mill closure and the North American decline in manufacturing, the region was increasingly seen as a place that could accommodate imported goods and minimize the impact of goods movement on urban populations; SCAG planners determined that the Inland Empire was capable of providing 50 percent of the space required to accommodate future import growth (De Lara 2018). Ultimately this fueled massive speculation in industrial land, which along with new real estate investment products and the standardization of logistics practices, led to the meteoric growth of warehousing in the Inland Empire (De Lara 2018).

Today, most of Fontana's remaining vacant land has been approved for development, and is expected to be developed by 2025 (Fontana General Plan, 2018). As seen in Figure 1.11, much of Fontana has been developed into single-family residences. Commercial and service activity within the city is centered around main streets like Sierra Ave, Foothill Blvd, Cherry Ave, and SR-210. Industrial development expands past the City's southwestern border into the neighboring cities of Ontario and Rancho Cucamonga.

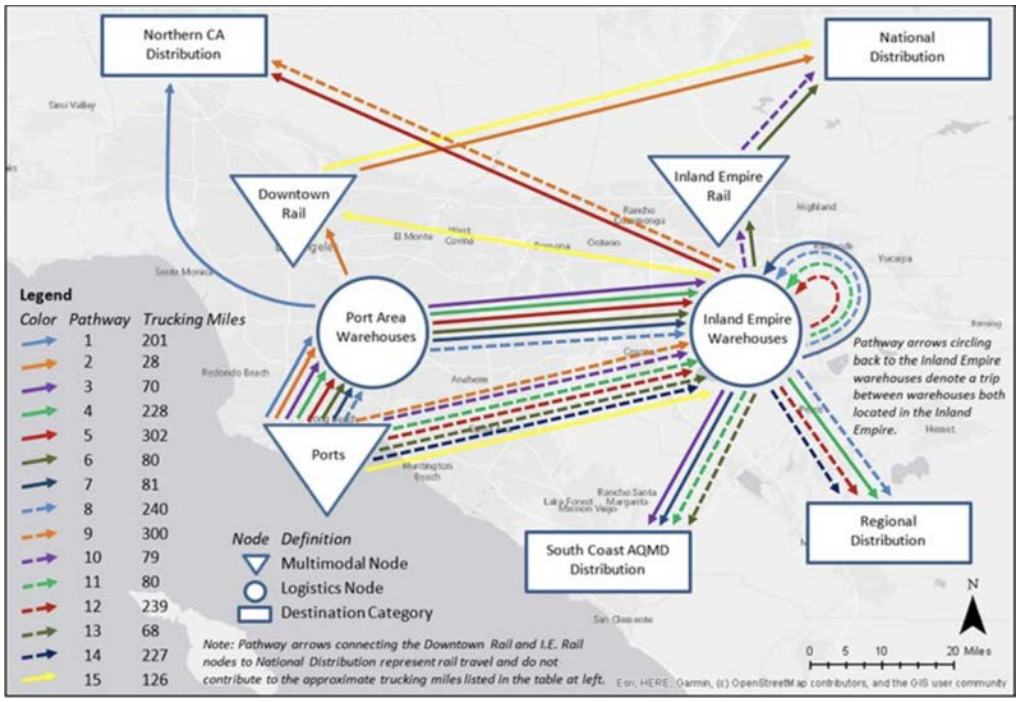
The Inland Empire is an important node in the goods movement network (Figure 1.12) and warehouses there are primarily focused on sorting goods and fulfilling orders before they are sent out for regional distribution (Harris 2018).

Figure 1.11: Buildings by land use in Fontana and surrounding area



Source: Author generated using data downloaded from *2016 Land Use Information for San Bernardino County*, *2016 Land Use Information for Riverside County*, *Microsoft/USBuildingFootprints* [2018] 2021

Figure 1.12: Goods Flows in the Inland Empire and Surrounding Regions

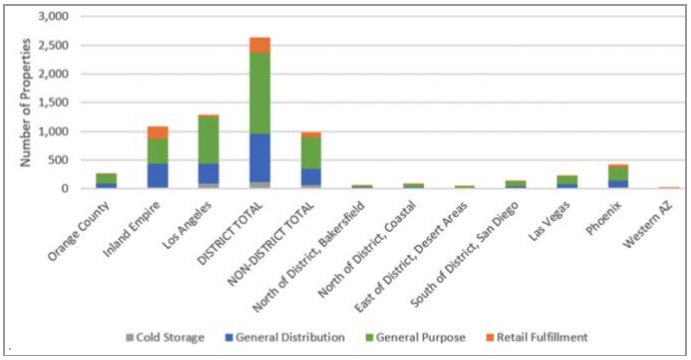


Source: Industrial Economics, Incorporated and CALSTART 2020.

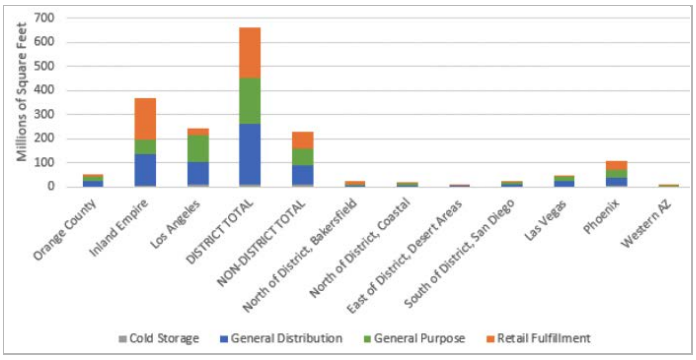
The Inland Empire has more warehouse square feet than Los Angeles and Orange County combined (Figure 1.13). The Inland Empire also has more warehousing square feet than regions outside of Southern California including Las Vegas, Phoenix, and Western Arizona.

Figure 1.13: Number of Warehouse Properties and Warehouse Square Footage

Warehouse Properties



Warehouse Square Feet



Source: Industrial Economics, Incorporated and CALSTART 2020.
"District" refers to the entire SCAQMD district

Figure 1.14: Monthly rent and sale prices across markets for warehouses with building area of at least 100,000 square feet (2019)

MARKET	AVERAGE RENTAL PRICE PER SQUARE FOOT	AVERAGE SALE PRICE PER SQUARE FOOT
South Coast AQMD Total	**$0.88**	**$1,087**
Orange County	$0.92	$503
Inland Empire	$0.70	$1,164
Los Angeles	$0.93	$1,173
Non-District Average	**$0.58**	**$344**
North of District, Coastal	$0.78	$100
North of District, Bakersfield^	$0.34	$105
East of District, Desert Areas*^	$0.81	$27
South of District, San Diego	$0.92	$225
Las Vegas	$0.63	$574
Phoenix	$0.50	$307
Western AZ*^	$0.32	No Data
Grand Average	**$0.71**	**$815**

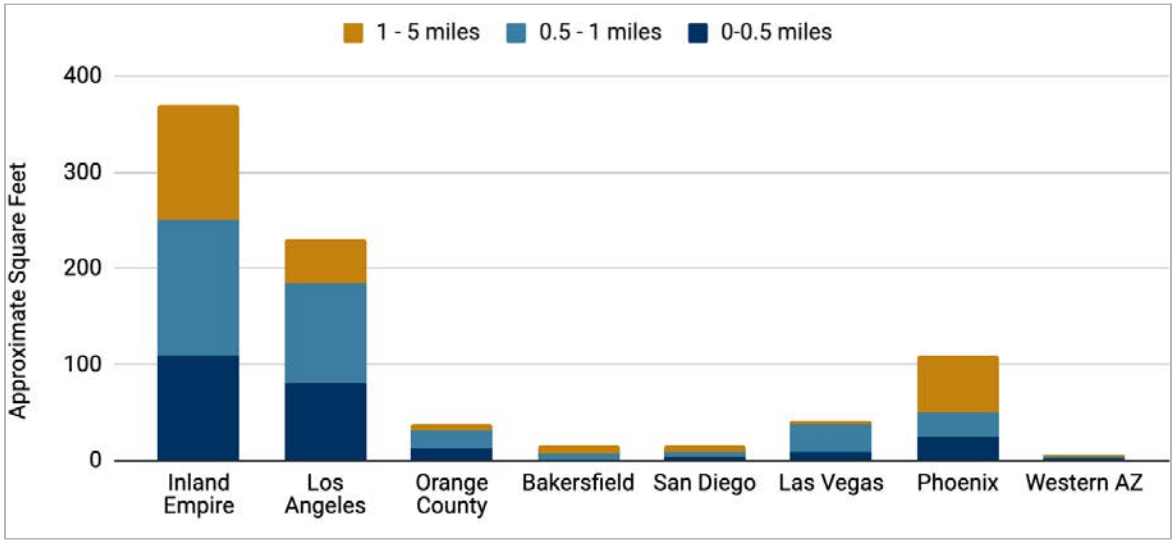
*Denotes fewer than five properties with available sales data.
^Denotes fewer than five properties with available rent data.

Source: Industrial Economics, Incorporated and CALSTART 2020.

Of regions in the South Coast Air Quality Management District, monthly rents for warehousing space are lower in the Inland Empire than in Orange County and Los Angeles. However, warehouse rents in the Inland Empire are higher than those in Bakersfield, Las Vegas, Phoenix, and Western Arizona (Figure 1.14). While this may appear to put the Inland Empire at a competitive disadvantage, it is important to recognize that locational advantages of Fontana, including proximity to the Ports of Los Angeles and Long beach, the Ontario airport, and regional highway networks, keep transportation costs low. These low transportation costs offset higher land rents in the Inland Empire.

The Inland Empire thus sits at the heart of the transportation network in Southern California, and is located farther from the coast leading to low land costs, which is important as warehousing is a land-intensive industry. Compared to many of its competitors, the Inland Empire is the most accessible warehouse region by distance to major roads (Figure 1.15). Hence the Inland Empire dominates the wider region in the warehousing and logistics industry. See "Rootedness of the warehousing and logistics industry in the Inland Empire" in Section 3 for more details on the difficulty for the warehousing and logistics industry to relocate away from the Inland Empire.

Figure 1.15: Approximate Square Footage of Properties by Distance from Major Roads



Source: Industrial Economics, Incorporated and CALSTART 2020.

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