

The Airport District



Lufthansa jet taking off at Portland International Airport.

Main Features

- A regional freight hub location centered on Portland International Airport
- A mix of industries focused on distribution, including nearly a third of the metro area's transportation jobs
- Room to grow with 770 acres of vacant buildable land and 430 acres of constrained, partly buildable land

The expansive 5,700-acre Airport District is Oregon's hub location for air transportation. Portland International Airport (PDX) is the defining feature of the district. The PDX complex (Port of Portland ownership) spans 2,700 acres and has a public and private workforce of 8,000. The runway site itself covers an expansive 1,100 acres, surrounded by aircraft maintenance, air cargo, military, and travelers' services facilities.

The distribution sector employs half of the district's 24,000 workers, the highest share among Portland's industrial districts. Its specialty industries relative to other Portland industrial districts and the region are air transportation, trucking, transportation support activities, durable goods wholesalers, and fabricated metal products manufacturing. Thirty percent of the metro area's 30,000 transportation jobs are here.

Site conditions reflect the district's function as a distribution hub. Located between the I-5 and I-205 freeways, 63 percent of the district acreage is on sites within one mile of a freeway ramp, and 97 percent is within two miles. Sites larger than 50 acres make up 59 percent of the district (the airport accounts for 47 percent). Heavy industrial facilities use 45 percent of the occupied developed land. Pockets of mixed commercial and industrial development with General Employment zoning (10 percent of the district) are concentrated along Airport Way, 82nd Avenue, and Martin Luther King Boulevard.

The district has 770 acres of vacant buildable private land, 42 percent of the total supply among Portland's industrial districts. All but 16 acres of that land is affected by availability or use limitations, and 320 acres of it is on sites that may be affected by environmental cleanup or investigation. An additional 430 acres of partly buildable vacant land is affected by floodplain or habitat constraints. Most of the district's buildable vacant land is within the PDX complex or at Cascade Station east of PDX.

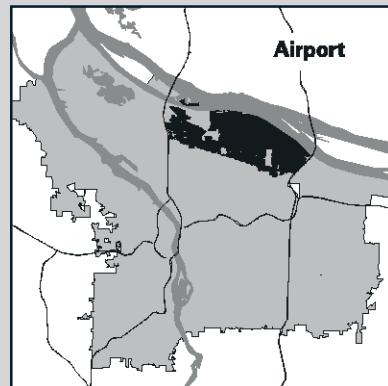
LARGEST EMPLOYERS

	INDUSTRY	JOB
Horizon Air-Flight	Air Transportation Scheduled	500+
Sapa Anodizing	Special Industry Machinery Manufacturing	500+
Huntleigh USA	Detective Guard & Armored Car Services	250-499
Nabisco Inc. Bakery	Cookies & Crackers	250-499
United Airlines	Air Transportation Scheduled	250-499
Jubitz Corp. Admin. Office	Gasoline Service Stations	250-499
Yellow Freight Systems	Trucking Except Local	250-499
Halton Company	Construction & Mining Machinery	250-499
Market Transport Ltd.	Local Trucking Without Storage	250-499
Owens Brockway Glass	Glass Containers	250-499

Source: Inside Prospects, 2003

LOCATION

The Airport District in NE Portland is the middle portion of the Columbia Corridor between I-5 and I-205.

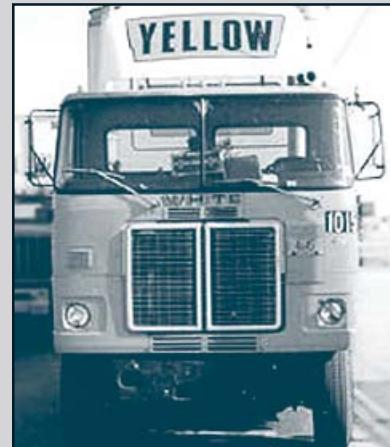


SIZE

- ◆ 874 sites on 5,686 acres
- ◆ 37 percent of the city's industrial land.
- ◆ 23,938 jobs in 892 establishments (2002).



Fed Ex cargo planes at Portland International Airport.

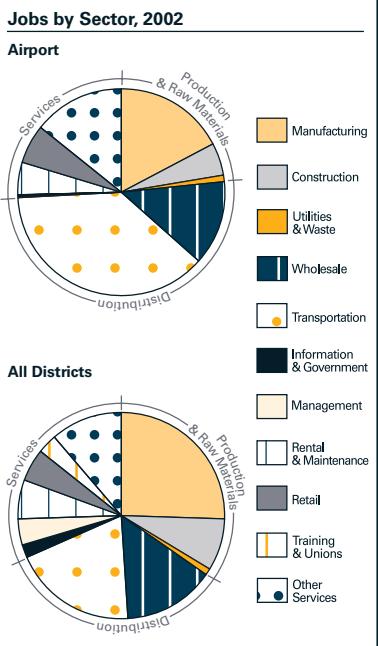


Yellow freight is the district's largest trucking employer.



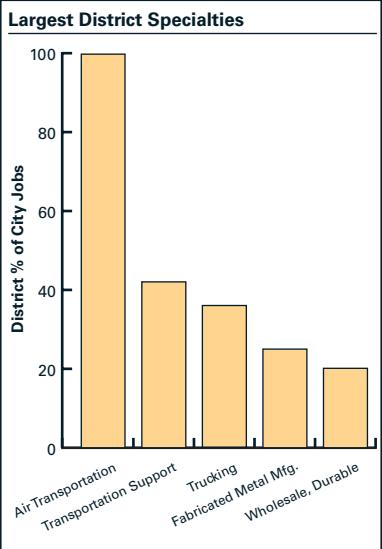
Delta Air Cargo at Portland International Airport.

Mix of Industries



ESTABLISHMENTS AND JOBS, 2002

	NAICS	Establishments	Jobs/Establishment	Jobs	% of All Jobs in Area District	% of All Jobs in Area All Districts
All Sectors		892	27	23,938	100%	100%
Production & Raw Materials		225	25	5,693	24%	34%
Manufacturing	311-339	127	32	4,085	17%	25%
Construction	236-238	76	17	1,270	5%	8%
Utilities & Waste Mgmt.	A	17	17	292	1%	1%
Distribution		320	37	11,946	50%	34%
Wholesale	423-425	179	17	3,107	13%	14%
Transportation	481-493	141	63	8,839	37%	19%
Services		347	18	6,299	26%	32%
Information	B	*	*	*	*	*
Management	551	8	14	112	0%	4%
Rental & Maintenance	C	84	15	1,259	5%	6%
Government	921-928	*	*	*	*	*
Retail	441-454	74	20	1,470	6%	5%
Training & Unions	D	11	11	117	0%	3%
Other Services	E	164	20	3,243	14%	11%



Highest Employment Industries

Industry	Jobs	Avg. Employees	Jobs/Establishment	Jobs	% of All Jobs in Area District	% of All Jobs in Area All Districts
Air Transportation	481	25	172	4,303	18%	4%
Wholesale, Durable	423	126	19	2,393	10%	9%
Transportation Support	488	47	42	1,984	8%	4%
Truck Transportation	484	45	34	1,544	6%	4%
Fabricated Metal Mfg.	332	45	24	1,092	5%	4%
Specialty Contractors	238	56	19	1,060	4%	6%
Food & Drinking Places	722	36	23	811	3%	2%
Food Manufacturing	311	9	86	778	3%	3%

NAICS: A = 221, 517, 562; B = 511-519, exc. 517;
C = 532, 5617, 811, 8123; D = 6112-6117, 6213, 81393;

Source: Covered Employment,
Oregon Employment Department

* Data suppressed for confidentiality.

FACILITY TYPES

Facility Type	Sites	Total Acres	% of Occupied**		
			Acres	Average Size	Developed Area
Occupied Sites**	729	5,107	3,943	5.41	100% 100%
General Industrial	84	304	257	3.06	7% 17%
Manufacturing	50	242	199	3.97	5% 13%
Utilities	8	31	30	3.71	1% 2%
Construction	26	31	28	1.07	1% 2%
Distribution	150	2,293	1,867	12.45	47% 47%
Freight Terminal	7	1,409	1,349	192.69	34% 32%
Wholesale	108	340	291	2.70	7% 9%
Transportation	35	544	227	6.48	6% 6%
Multi-Tenant	117	1,035	820	7.01	21% 18%
4+ Tenants	35	855	648	18.52	16% 12%
Industrial Services	95	992	589	6.20	15% 11%
Public	56	889	505	9.01	13% 9%
Rental & Mtnc.	39	103	84	2.16	2% 2%
Non-Industrial	283	485	411	1.45	10% 8%
Retail	29	80	79	2.73	2% 2%
Other Services	44	241	226	5.13	6% 4%
Residential	210	164	106	0.50	3% 2%
Unoccupied Sites	145	580	116	0.80	
Heavy Industrial	24	2,335	1,759	73.29	45% 48%

* Developed area does not include vacant (unimproved) land or open space.

** Occupied sites are those with a current tenant.

Source: Bureau of Planning

AIRPORT DISTRICT

Site Conditions

ZONING

	Industrial			Employment		
	IH	IG1	IG2	EG1	EG2	Other
Acres	229	0	4,652	0	559	246
% of All Acres	4%	0%	82%	0%	10%	4%

*IH = Heavy Industrial. IG = General Industrial. EG = General Employment.

IG1 and EG1 are small-lot zones

Source: Bureau of Planning

SITE SIZE

(acres)	< 1	1-2	3-9	10-19	20-49	50+	
Sites	448	221	1239	45	15	16	Average
% of District	51%	25%	15%	5%	2%	2%	Site Size
Acres	194	391	657	651	445	3,349	= 6.51
% of District	3%	7%	12%	11%	8%	59%	

Source: Bureau of Planning

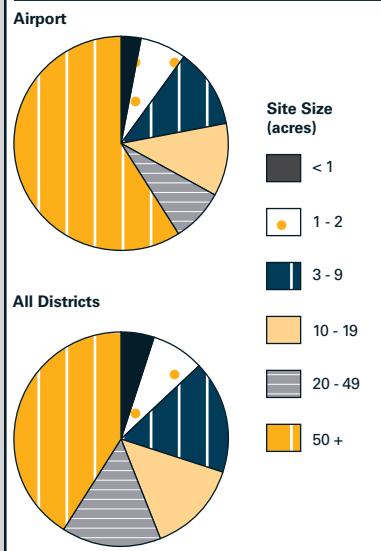
PROPERTY VALUES

	District (\$ million)	Average per sq. ft.*		High Land Value Sites (exceeding \$6/sq. ft.)		Average Improvements/ Land Value Ratio
Land	\$1,101.96	\$4.71	Sites	270		
Improvements	\$1,251.22	\$5.35	Acres	838.2		
Total	\$2,353.2	\$10.07	% of District	15%		= 1.14

* Square footage does not include open space.

Source: Multnomah County Assessment & Taxation, March - July 2004

District Land Area by Site Size



ENVIRONMENTAL CONSTRAINTS

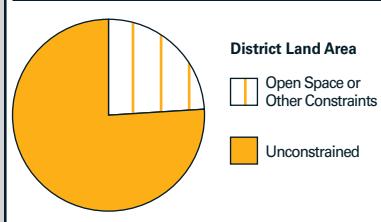
	Acres	% of District	
Open Space*	321	6%	
Constrained Land (Composite)	1,315	23%	
100 Year Floodplain	368	6%	
Other 1996 Inundation Area	175	3%	
Title 3 Wetlands	144	3%	
10% or Greater Slope	40	1%	
Goal 5 Significant Habitat	1,008	18%	
Open Space or Constrained	1,344	24%	

Potential Cleanup Sites

41 sites with cleanup or investigation projects;

14 cleaned or investigated sites with “no further action required”

Environmental Constraints



* OS, p, n zones; mitigation sites; public drainage; 10-year floodplain

Source: Oregon DEQ - cleanup sites

PROXIMITY TO TRANSPORTATION INFRASTRUCTURE

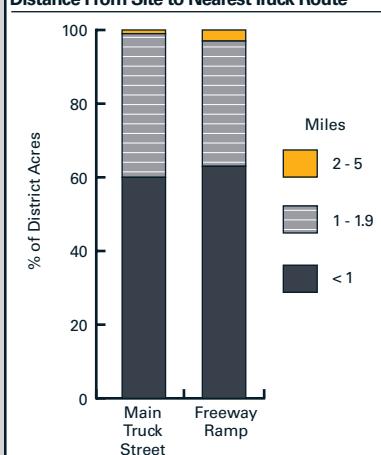
TRUCK & TRANSIT ACCESS							
Miles from Site	Major Truck Street Acres	% of District	Freeway Ramp Acres	% of District	Miles from Site		
					Bus Stop Acres		
< 1	3,426	60%	3,594	63%	< 1/4	2,424	43%
< 2	5,668	100%	5,524	97%	< 1/2	4,999	88%
< 5	5,686	100%	5,687	100%			

MULTIMODAL FREIGHT ACCESS

	Airport		Railroad		Harbor	
	Acres	% of District	Acres	% of District	Acres	% of District
Adjacent	2,685	47%	280	5%	0	0%
< 5	5,686	100%				

Source: Bureau of Planning

Distance From Site to Nearest Truck Route



Growth Capacity



Cascade Station/Portland International Center development.

VACANT LAND (UNIMPROVED ACRES) 2002

	All Vacant Land	Buildable, Private Land*			Partly Buildable Tier F**	Public & Utility Sites	Land for Sale
	Total	Unconstrained Tier A	Buildable Tier B - E				
All Vacant Sites	1,440	766	16.4	713.8	425.7	132.8	134.7
Potential Cleanup Sites	536	318	0.0	315.2	158.7	33.3	

* Tiers B-E do not have Tier F buildability constraints but availability or use may be limited.

** Tier F land is affected by either 100-year floodplain, 1996 inundation area, Title 3 wetland, slope exceeding 10 percent, or Metro Goal 5 habitat inventory.

Sources: Metro - vacant; Bureau of Planning - Tiers A-F; CoStar - land for sale



Vacant land at PDX.



Vacant land east of PDX.

OTHER POTENTIALLY UNDERUTILIZED PROPERTY

	Cleanup/Investigation			Industrial Land in Residential Use**		Developed Space on Market, April 2004	
	Sites	Acres	% of District	Sites	Acres	Sites	Area
All Land in Sites	41	2,672	47%	210	164	For Sale	
Developed/Occupied Portion	16	2,131	37%			18	478,160 sf
Underutilized Portion*						For Lease	
(Potential Brownfields)	25	541	10%			55	1,842,636 sf
Unoccupied Sites	6	10	.2%				
Vacant Land on Occupied Sites	19	531	9%				

* Unoccupied sites (no tenant) and vacant (unimproved) parts of sites are underutilized. Cleanup liability may complicate redevelopment on some parts of these sites.

** Non-conforming residential use on site zoned or designated in Comprehensive Plan as industrial or general employment.

Sources: CoStar - space for sale or lease; Oregon DEQ - cleanup sites; Multnomah County Assessment & Taxation - market property value.

ACCESS TO FINANCIAL TOOLS

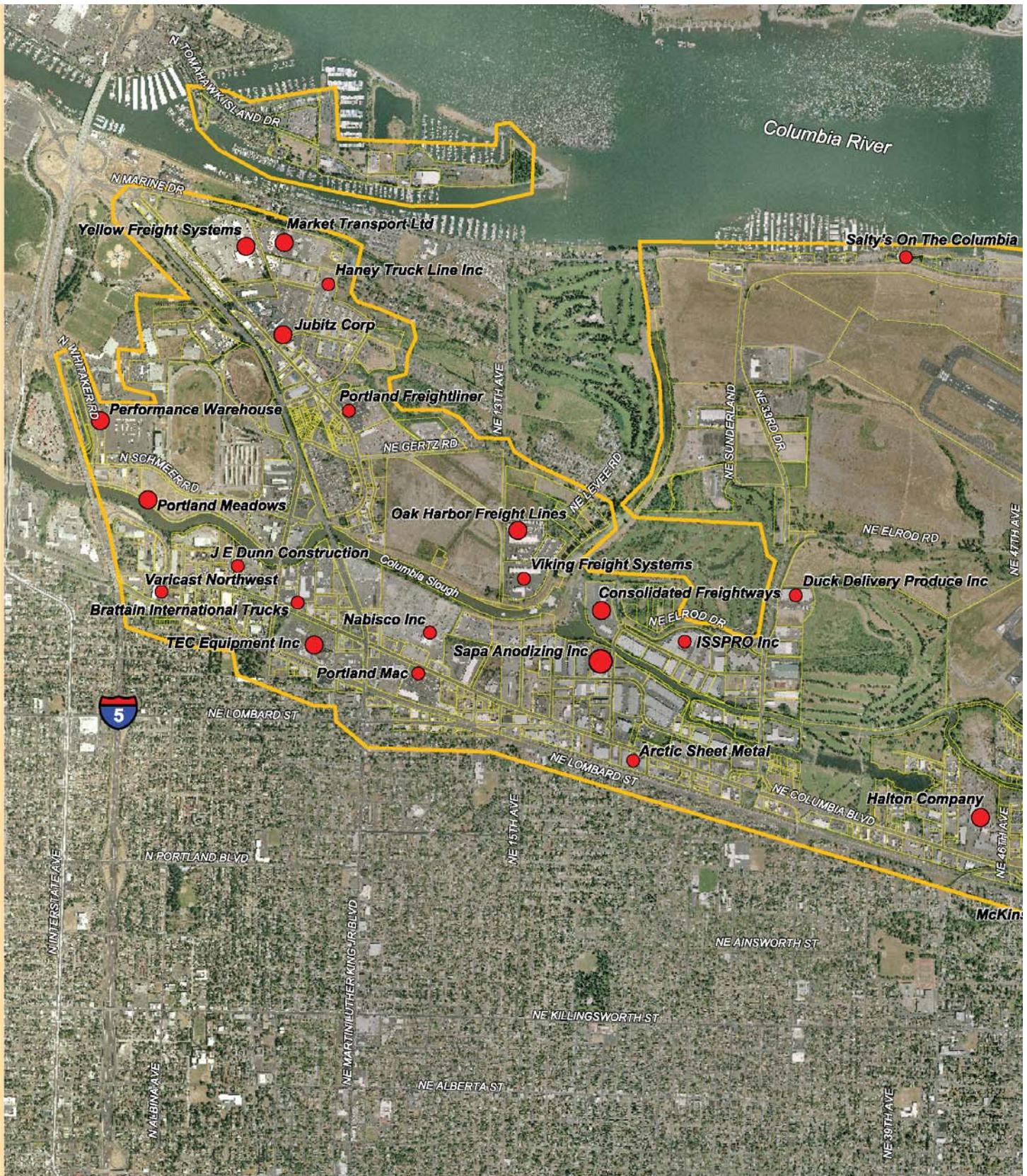
	% of Sites		% of Acres	% of District
Urban Renewal Area	106	12%	1,002	18%
Enterprise Zone	862	99%	5,633	99%
New Market Tax Credits	534	61%	4,619	82%

Source: Portland Development Commission

CAPITAL IMPROVEMENTS PROGRAM PROJECTS

Portland CIP projects that will expand the district's development capacity:

- Sewer pipe, pump stations (BES005413) - Colwood to 42nd at Columbia Boulevard.
- Freight mobility improvements (PDT000046) - 82nd to I-205, Columbia Boulevard to Killingsworth.
- NE Columbia turn lane (PDT000117) - at NE MLK Boulevard.
- NE 33rd slough crossing (PDT000088) – replace east half of NE 33rd crossing.
- NE 33rd bridge upgrade (PDT000087) – bridge over Lombard and railroad.
- Airport Way Non-potable water system (WTR000152) - I-205 to NE 82nd.



Airport District

Employment

- 100 - 249 Employees
 - 250 - 499 Employees
 - 500+ Employees

■ Site Boundary

■ Inventory Area Boundary



Elevation profile diagram showing a series of steps representing elevation changes along a route. The profile starts at 0 feet, rises to 430 feet, drops to 880 feet, rises to 1,720 feet, drops to 2,580 feet, and finally rises to 3,440 feet.

AIRPORT DISTRICT



Information Sources:

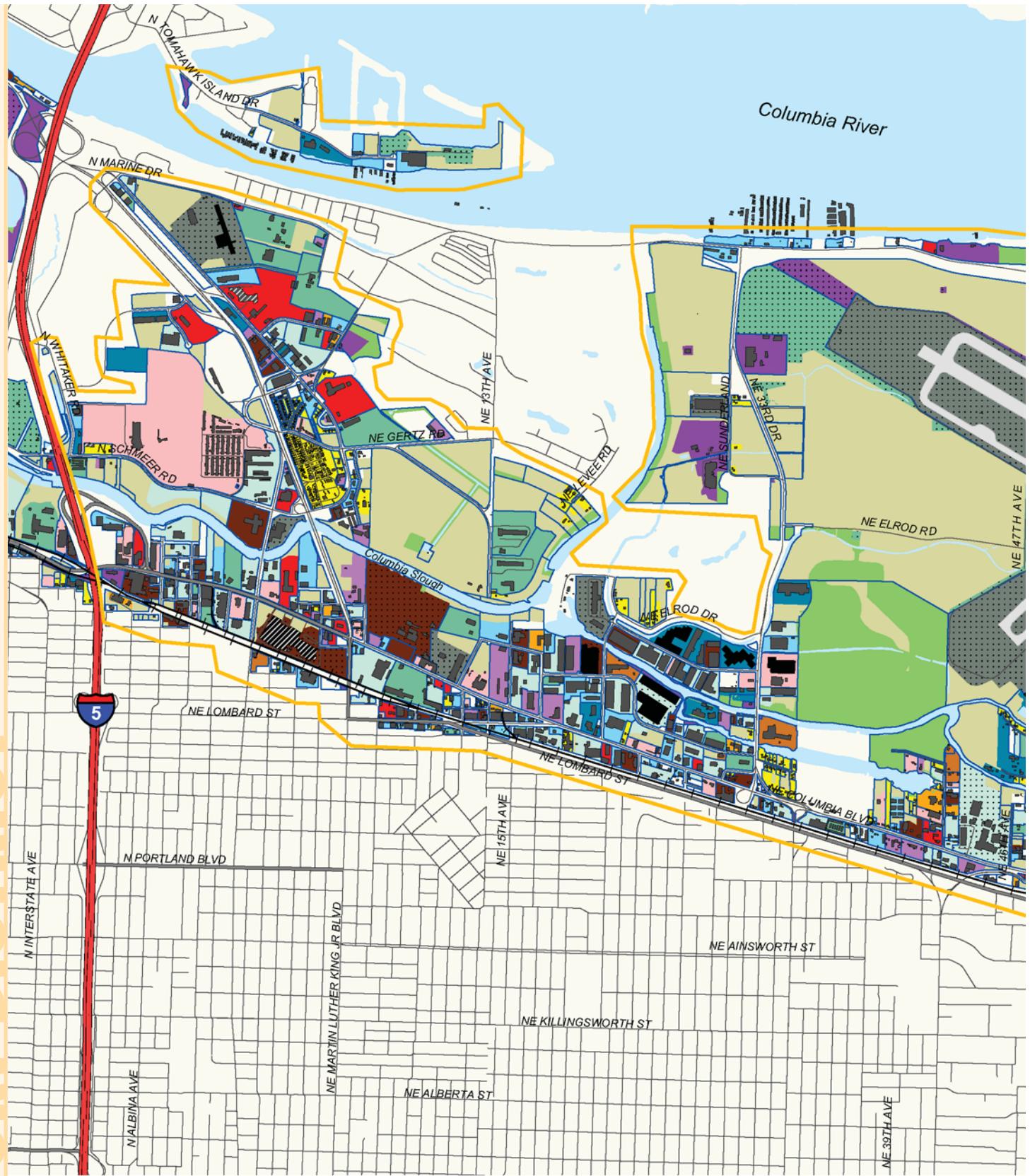
- Orthophotography - Metro Regional Consortium, 10' or 20' pixel resolution (2003).
- Sites - Bureau of Planning, based on taxlot information provided by City of Portland Corporate Geographic Information System and Multnomah County Assessment and Taxation (February 2003).
- Employers - Inside Prospects (2003).
- Information sources are described further in Chapter 3.

Investing in Portland's Future

PDC
PORTLAND DEVELOPMENT COMMISSION



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Airport Facilities

Heavy Industrial



General Industrial

A legend consisting of three colored squares with corresponding labels: a dark brown square for Manufacturing, an orange square for Utilities, and a yellow square for Construction.

Distribution

Freight
Transportation
Wholesale

Multi-tenant

4 + Employers
2-3 Employers

Industrial Services

Public

Non-Industrial

Open Space

Vacant Land

 3 + Story (overlay)

Structures >100,000

Other Structu

Site Boundary

Transportation Infrastructure

— Railroad

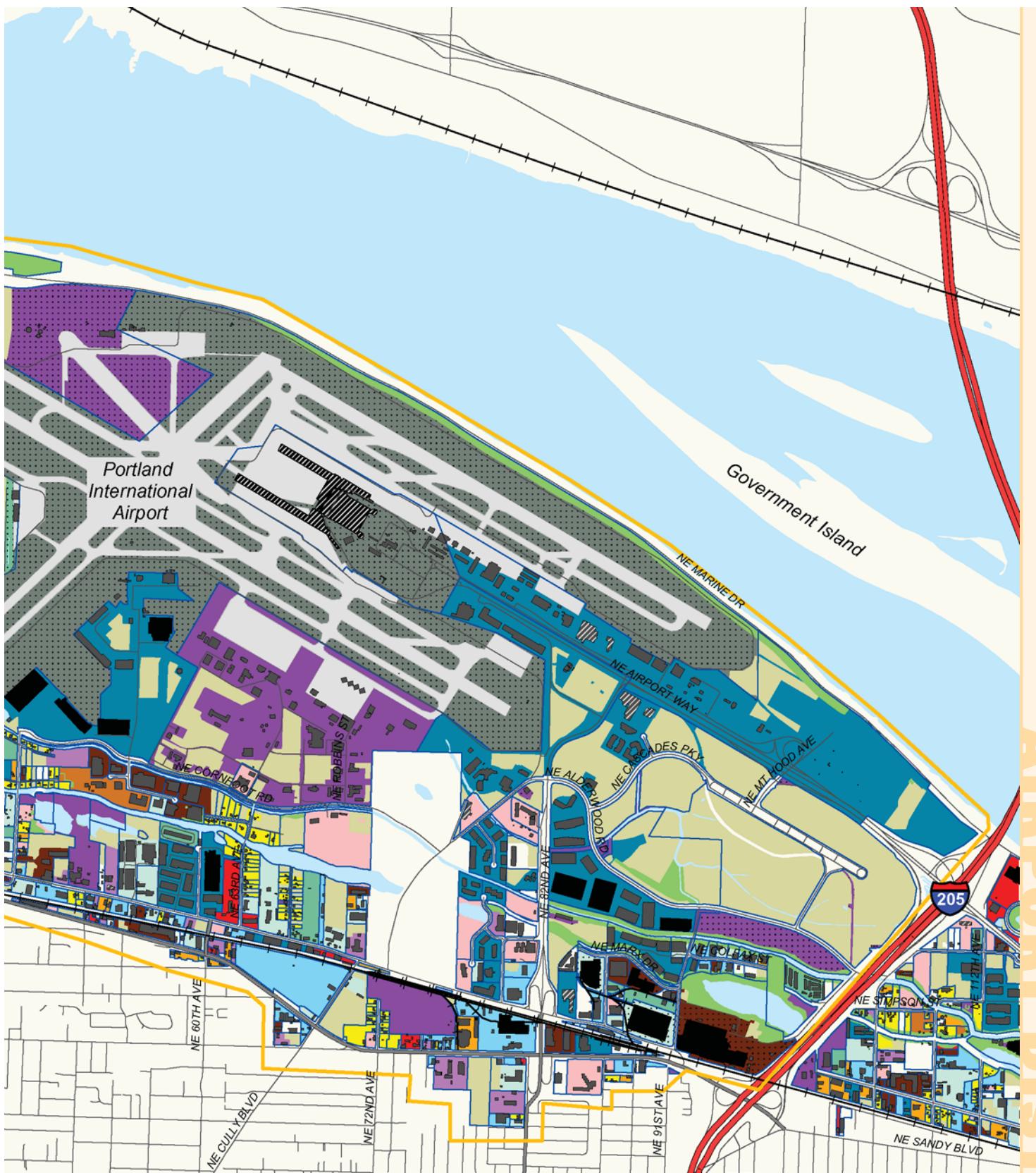
Freeways

— Major

5666



AIRPORT DISTRICT



Information Sources:

- Facilities - Bureau of Planning, based on employment data by Inside Prospects (2003), supplemented by InfoUSA data (2003) and Bureau of Planning field inspection (2004). Utility and public facilities also include unoccupied sites in corresponding ownership.
- Bureau of Planning identified freight terminal and heavy industrial sites from use and scale characteristics.
- Railroads - Metro from 2000 Regional Transportation Plan.
- Truck Streets - Portland Office of Transportation from Transportation System Plan (2002).
- Information sources and methodology are described further in Chapter 3.

Investing in Portland's Future

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AIRPORT DISTRICT



Airport Growth Capacity

Tiers - Vacant Land	
A	No Constraints
B	Land Banked
C	Infill
D	Underutilized
E	Other
F	Partly Buildable

Capital Improvements Program

- / Bureau of Environmental Services Projects
- / Portland Office of Transportation Projects
- - Bureau of Water Works Projects
- / Inventory Area Boundary

Transportation System Plan

- - Freight Projects

Potential Cleanup Sites

- ▲ Active Investigation or Cleanup
- ▲ No Further Action Required

Environmental Constraints

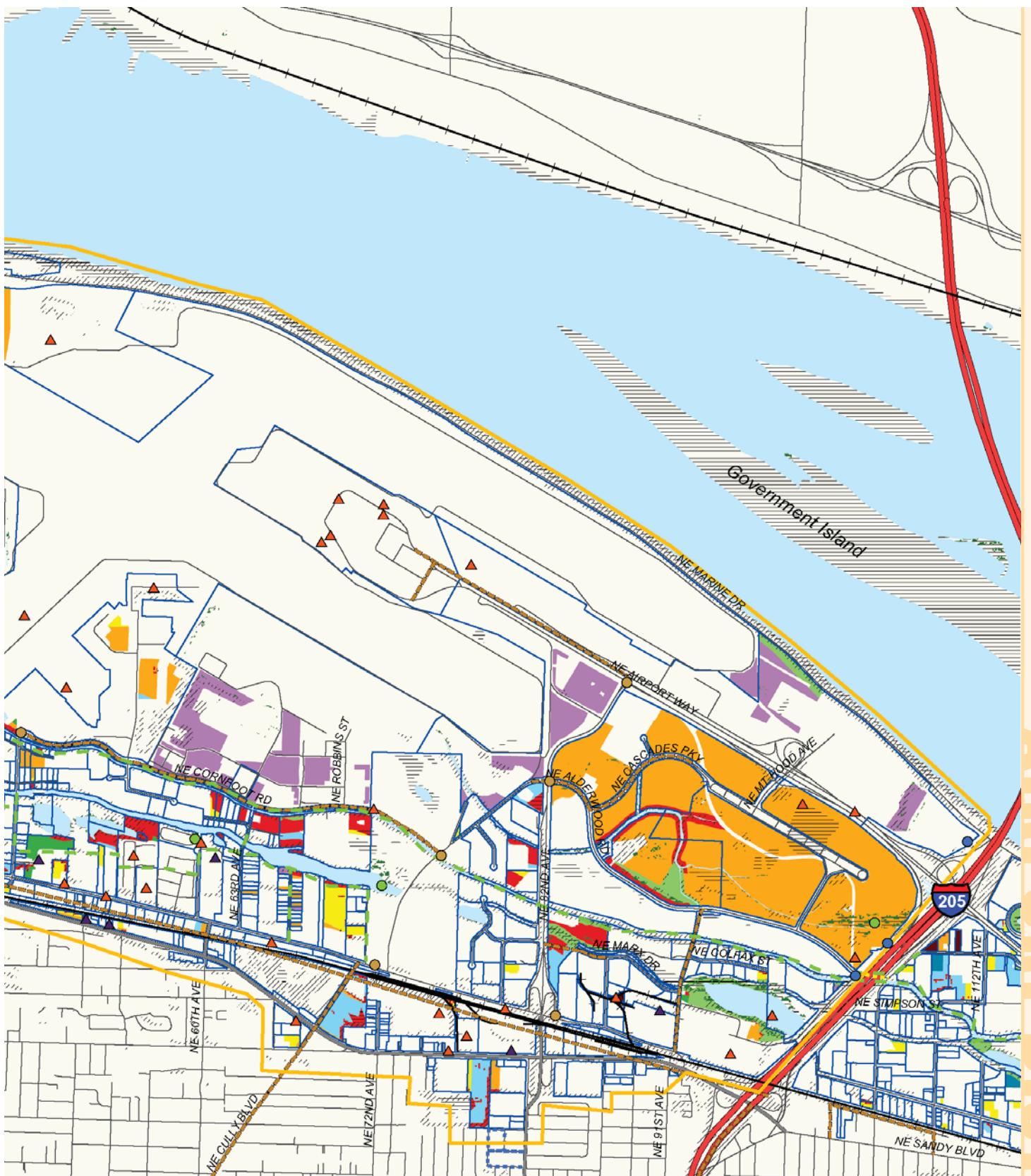
- Wetlands
- ▨ Slope > 10%
- ▨ 100 yr & 1996 Floodplains

Transportation Infrastructure

- Railroads
- Freeways
- Major Truck Streets
- Streets



0 425 850 1,700 2,550 3,400 Feet



Information Sources:

- Vacant land - tiers defined by Bureau of Planning from Metro (2002) vacant land data. Tier F is affected by the floodplain, slope, or wetland constraints shown or Metro Goal 5 habitat resources (2004). Open space includes OS, p, and n zones from BOP zoning (2004) and mitigation sites, 10-year floodplain, and public drainage facilities from Portland Bureau of Environmental Services (2004).
- Capital Improvement Program projects - City of Portland Corporate Geographic Information System (2004).

- Capital Improvements Program projects - City of Portland Corporate Geographic Information System (2004)
- Transportation System Plan projects - Portland Office of Transportation (2004).
- Potential Cleanup Sites - Oregon Department of Environmental Quality from Environmental Cleanup Site Information database (April 2004) mapped in approximate locations by Portland Bureau of Environmental Services. Data in ECSI is "working information" and some may be unconfirmed, outdated, or incomplete.
- Environmental Constraints - wetlands and 1996 flood inundation area from Metro Title 3 regulations. Modeled 100-year floodplain by Metro (2002).

- Information sources and methodology are described further in Chapter 3.

Investing in Portland's Future



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