



# **INDUSTRIAL DISTRICTS ATLAS**

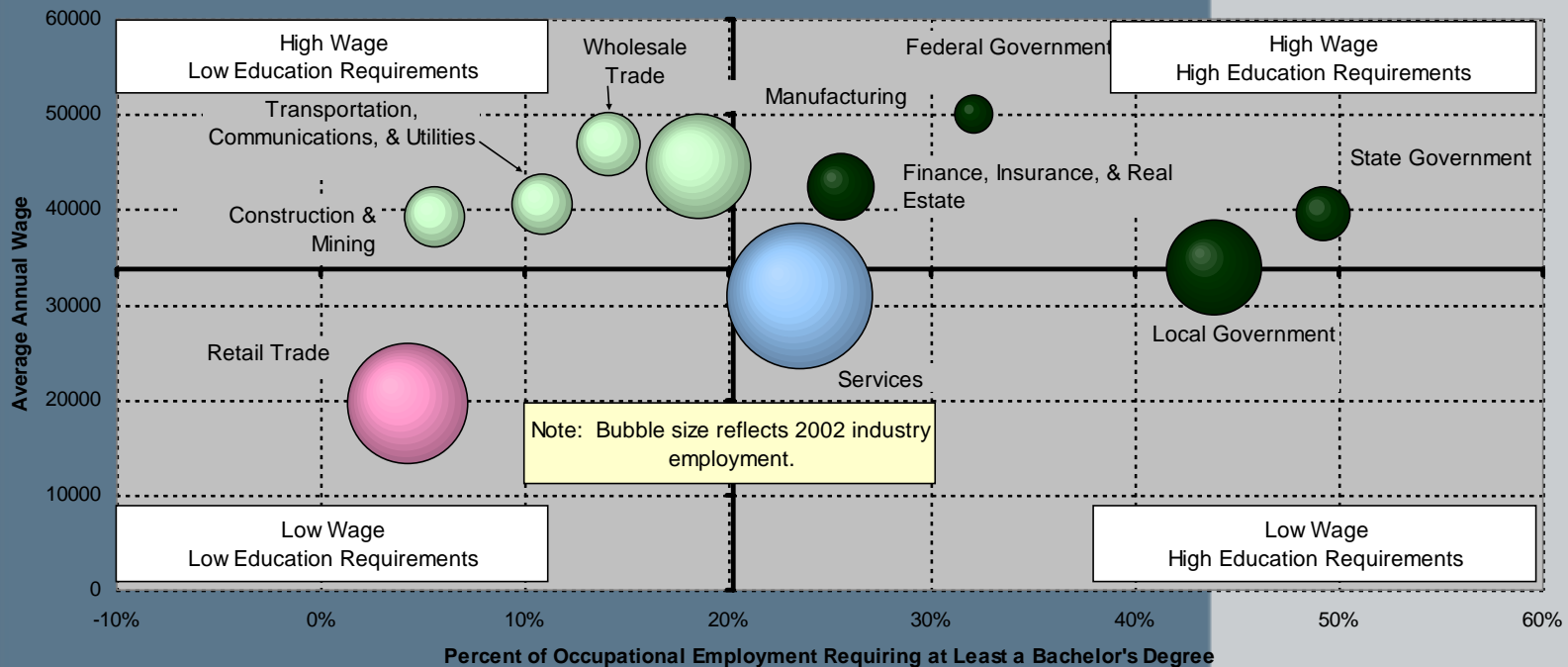
**2004** **PORTLAND, OREGON**

# Industrial Districts Matter

1. Good jobs
2. Traded sector land supply

## Oregon: Broad Industry Employment, 2002

Percent of Occupational Employment Requiring at Least a Bachelor's Degree  
by Industry Average Annual Wage



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

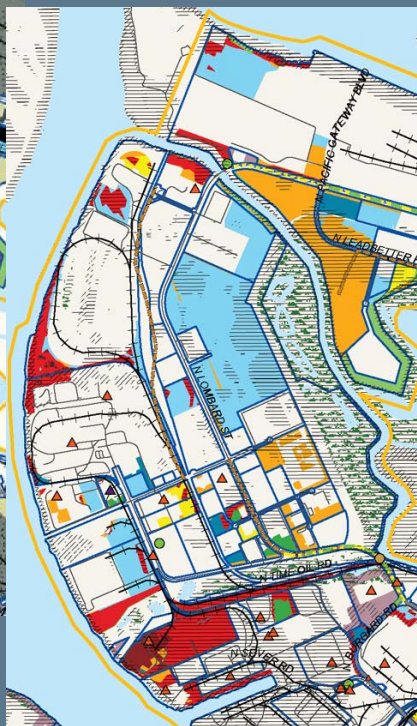
# Data as Economic Development



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



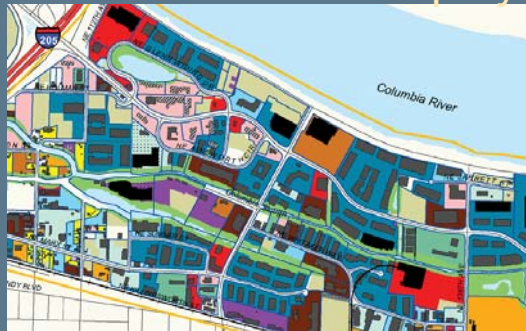


# How Districts Differ

Freight hub districts



Mixed Industrial/Employment districts



Dispersed areas

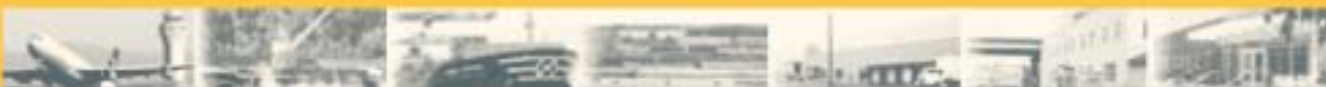


## District types:

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

## Implications:

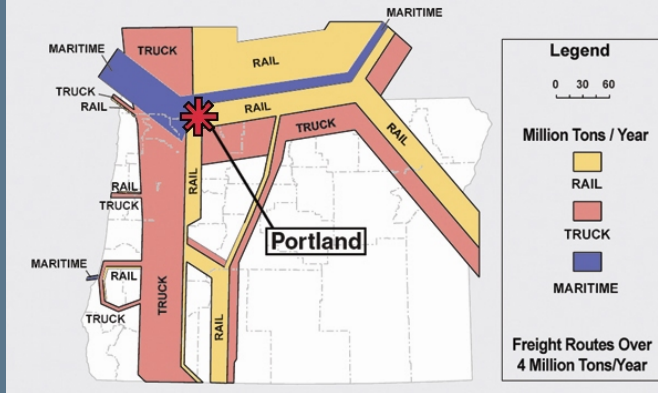
- Industry mix, land use, & infrastructure are interrelated
- Districts reveal city economic structure



# Freight Hub Districts

## Portland is Oregon's Freight Hub

Volume (Millions of Tons) of Freight Moved on Major Corridors in Oregon, 1996



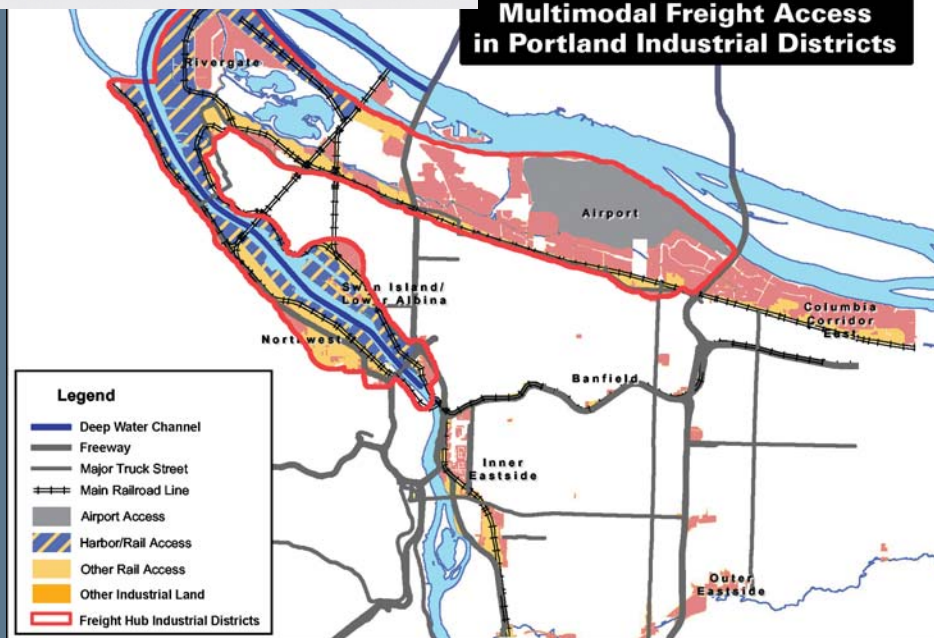
A West Coast freight hub concentrated in 4 districts

57% of land has harbor, rail, or runway access

56% of occupied land in heavy industrial use

Leading sectors: transportation, manufacturing

## Multimodal Freight Access in Portland Industrial Districts



# Mixed Industrial/Employment Districts



Flex space in Columbia Corridor East

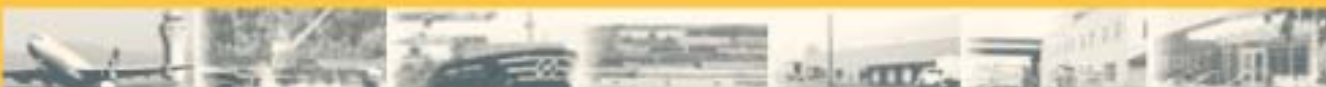


Urban street in Inner Eastside

**Services are leading sector: 45% of area jobs**

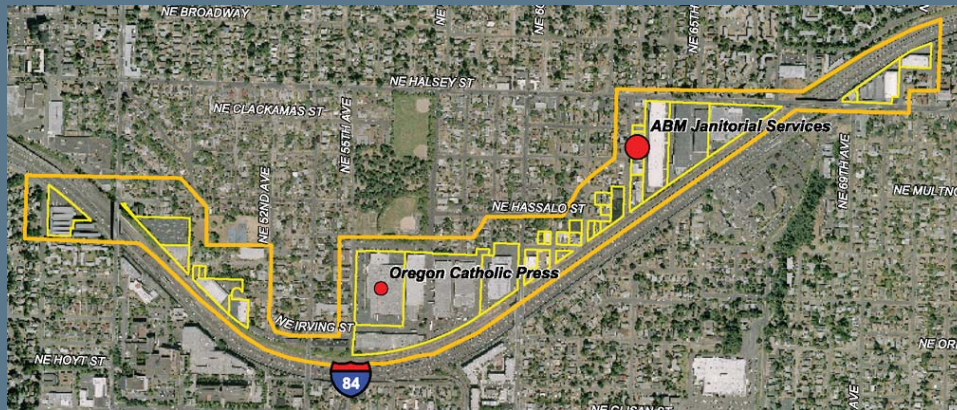
**High job density: 25 jobs per occupied acre**

**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

# Industry Mix



Swan Island Facilities

## Heavy Industrial

Heavy Industrial (overlay)

## General Industrial

Manufacturing  
Utilities  
Construction

## Distribution

Freight  
Transportation  
Wholesale

## Multi-Tenant

4+ Employers  
2-3 Employers

## Industrial Services

Public  
Rental & Maintenance

## Non-Industrial

Retail  
Services  
Residential

Open Space  
Vacant Land

3+ Story (overlay)

Structures > 100,000 Sq Ft  
Other Structures

Site Boundary

Inventory Area Boundary

## Transportation Infrastructure

Railroads  
Freeways  
Major Truck Streets  
Streets

0 305 610 1,220 1,830 2,440 Feet

1,260  
Occupied  
Acres

101,000  
Jobs

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?

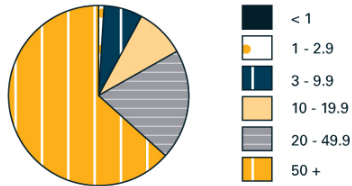
- 84% of manufacturing jobs are in industrial districts
- 75% of distribution jobs



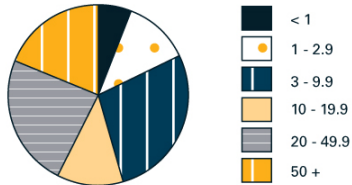
# Site & Structure Size

## Site Size

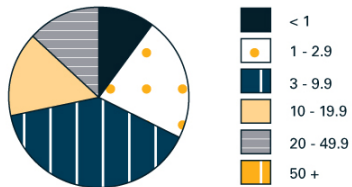
### Heavy Industrial Facilities



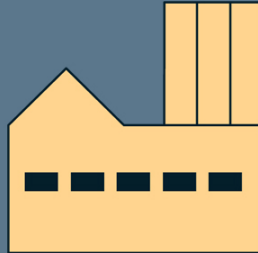
### Manufacturing Facilities



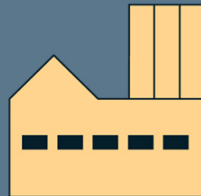
### Wholesale Facilities



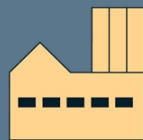
## Structure Size



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

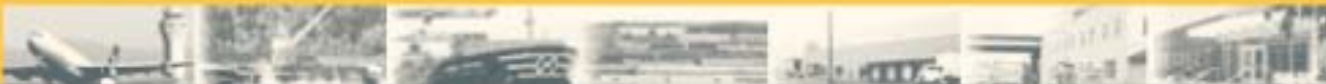
- Central access to 1 million metro workers

### 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:

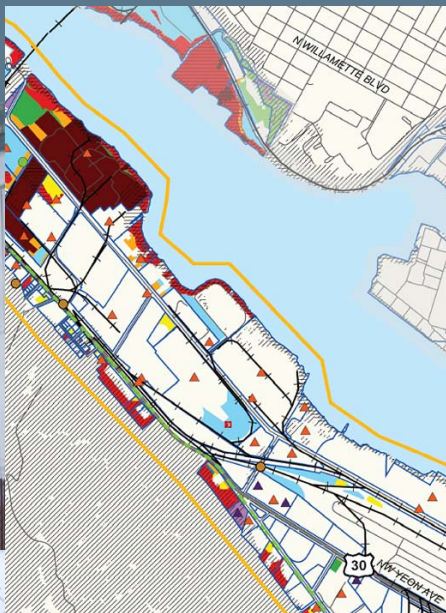
- 1,100 of 2,900 acres is "partly buildable" (e.g., floodplain, habitat)
- 900 of 2,900 acres is brownfield



GROWTH CAPACITY



# 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?

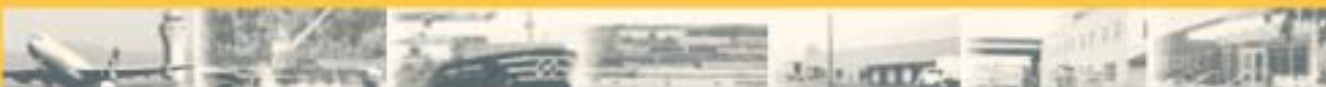
How do we get there?

## 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



The Industrial Districts Atlas is available at  
[www.portlandonline.com/planning](http://www.portlandonline.com/planning)

