

Industrial Districts

Columbia Corridor East Facilities

Heavy Industrial

Heavy Industrial (overlays)

General Industrial

Manufacturing

Distribution

- Freight
- Transportation
- Wholesale

Multi-Tenant

Industrial Services

- Public
- Rental & Maintenance

Non-Industrial

- Residential

Open Space

Vacant Land

3+ Story (overlays)

Structures >100,000 Sq Ft

Other Structures

Transportation Infrastructure

Railroads

Freeways

Major Truck Routes

Sidewalks

The Northwest Industrial District



Launch of new barge manufactured by Gunderson Inc.

Main Features

- A diverse mix of industries with major facilities in the semiconductor, railcar, printing, and steel industries
- A regional freight hub location with harbor, rail, and pipeline access
- Eight petroleum terminals here are a gateway for most of the fuels used in Oregon

The Northwest Industrial District is the west side of Portland's working harbor. It combines the Guild's Lake and Linton industrial areas. This older, heavy industrial quarter has the most diverse mix of manufacturing and distribution uses among the city's four freight hub districts.

Manufacturing is the leading employment sector, providing 44 percent of the district's 15,600 jobs. Its specialty industries relative to the city's other industrial districts and the region are transportation equipment manufacturing (e.g., Gunderson), printing (e.g., Graphic Arts Center), transportation support activities, primary metals manufacturing (e.g., Esco), and fabricated metal products manufacturing.

Heavy industrial facilities (primarily freight terminals) use 56 percent of the district's occupied developed land. Harbor access is available to 51 percent of the acreage, and rail access to 61 percent. Burlington Northern Santa Fe's Railroad's Lake Yard occupies 140 acres in the center of the district. Most of the district's harbor frontage is occupied by river-dependent facilities that have marine loading or moorage structures. A group of petroleum bulk terminals in the north half of the district are Oregon's distribution hub for gasoline, diesel and fuel oil, received from tanker vessels or the Olympic Pipeline for distribution to local markets.

The district has 140 acres of vacant, buildable private land, and another 80 acres of partly buildable vacant land is affected by floodplain or habitat constraints. Most of the district's vacant land and another 84 acres of unoccupied developed land are on sites with active environmental cleanup or investigation projects.

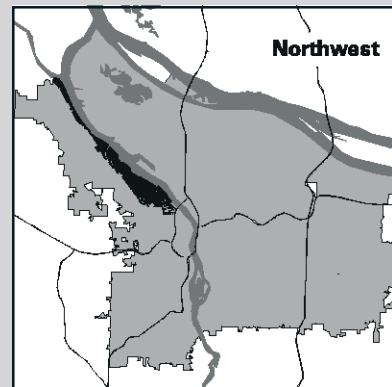
LARGEST EMPLOYERS

	INDUSTRY	JOB(S)
Siltronic Corp.	Semiconductors and Related Devices	500+
Gunderson Inc.	Gray Iron Foundries (railcars and barges)	500+
Esco Corporation	Steel Foundries	500+
Sulzer Inc.	Gray Iron Foundries (pumps)	500+
Electrical Construction	Electrical Work	250-499
Foss Maritime	Towing and Tugboat Services	250-499
John Carson Oil Co. Inc.	Fuel Oil Dealers	250-499
Graphic Arts Center Inc.	Commercial Printing Lithographic	250-499

Source: Inside Prospects, 2003

LOCATION

The Northwest District consists of Guild's Lake and Linton industrial areas. It is the portion of the Portland Harbor industrial areas on the west side of the Willamette River.



SIZE

- ◆ 493 sites on 1,717 acres
- ◆ 11 percent of the city's industrial land
- ◆ 15,594 jobs in 509 establishments (2002)



Sulzer Incorporated manufactures pumps.

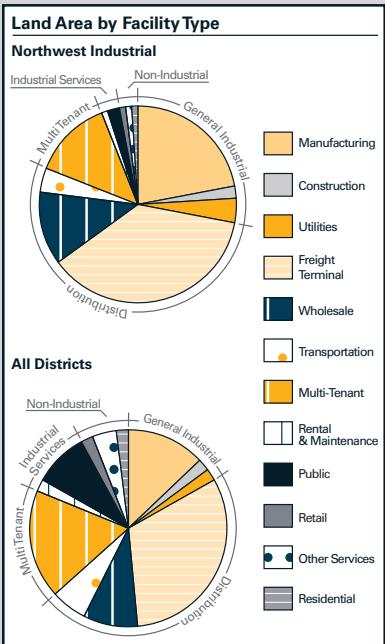
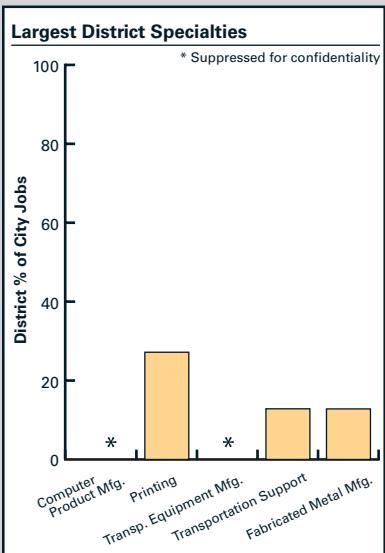
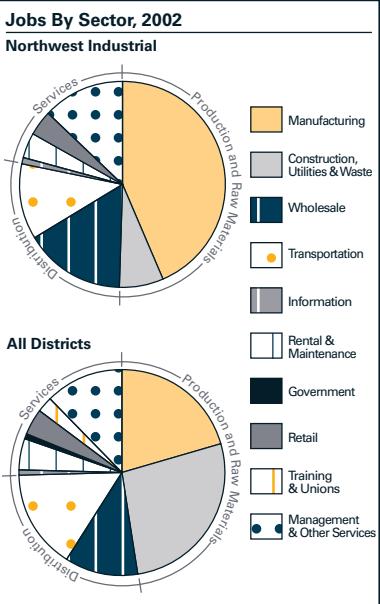


Esco steel foundry.



Siltronic Corporation manufactures semiconductors.

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	509	31	15,594	100%	100%
Production & Raw Materials	150	53	8,000	51%	34%
Manufacturing	311-339	59	6,852	44%	25%
Construction, Utilities & Waste	A, 236-238	35	1,148	7%	8%
Distribution	193	23	4,376	28%	34%
Wholesale	423-425	18	2,458	16%	14%
Transportation	481-493	33	1,918	12%	19%
Services	166	19	3,218	21%	32%
Information	B	10	117	1%	1%
Rental & Maintenance	C	25	506	4%	6%
Government	921-928	0	0	0%	1%
Retail	441-454	35	588	4%	5%
Training & Unions	D	5	24	0%	3%
Management & Other Svcs	551, E	22	1,983	13%	16%

Highest Employment Industries

Computer & Elec. Mfg.	334	*	*		
Wholesale, Durable	423	75	17	1,299	8%
Wholesale, Nondurable	424	35	29	1,028	7%
Specialty Contractors	238	22	45	1,000	6%
Transp. Equip. Mfg.	336	*	*	*	6%
Printing & Support	323	22	44	969	6%
Mgmt. of Companies	551	*	*	*	2%
Transportation Support	488	16	50	795	5%
Fabricated Metal Mfg.	332	28	26	720	5%
Primary Metal Mfg.	331	*	*	*	4%

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	District	All Districts
Occupied Sites**	385	1,512	1,260	3.27	100%	100%
General Industrial	91	498	362	3.98	29%	17%
Manufacturing	74	336	278	3.76	22%	13%
Construction	11	34	31	2.84	2%	2%
Utilities	6	128	53	8.86	4%	2%
Distribution	103	738	666	6.47	53%	47%
Freight Terminal	24	513	460	19.16	37%	32%
Wholesale	60	157	150	2.50	12%	9%
Transportation	19	68	56	2.95	4%	6%
Multi-Tenant	62	179	164	2.65	13%	18%
4+ Tenants	22	87	83	3.78	7%	12%
Industrial Services	35	60	37	1.06	3%	11%
Rental & Mtnc.	14	19	15	1.09	1%	2%
Public	21	41	22	1.04	2%	9%
Non-Industrial	94	37	29	0.31	2%	8%
Retail	21	10	9	0.45	1%	2%
Other Services	12	17	12	0.99	1%	4%
Residential	61	10	8	0.14	1%	2%
Unoccupied Sites	108	206	130	1.21		
Heavy Industrial	41	824	701	17.10	56%	48%

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

** Occupied sites are those with a current tenant.

Source: Bureau of Planning

NORTHWEST INDUSTRIAL DISTRICT

Site Conditions

ZONING

	Industrial			Employment		
	IH	IG1	IG2	EG1	EG2	Other
Acres	1,596	74	0	7	0	40
% of All Acres	93%	4%	0%	0%	0%	2%

* IH = Heavy Industrial. IG = General Industrial. EG = General Industrial.
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	266	128	66	17	10	6	Average
% of District	54%	26%	13%	3%	2%	1%	Site Size
Acres	100	229	367	248	313	461	= 3.48
% of District	6%	13%	21%	14%	18%	27%	

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	\$362.85	\$4.99	Sites	325	
Improvements	\$961.07	\$13.21	Acres	577.2	
Total	\$1,323.9	\$18.20	% of District	34%	= 2.65

* Square footage does not include open space.

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

ENVIRONMENTAL CONSTRAINTS

	Acres	% of District	Potential Cleanup Sites
Open Space*	47	3%	
Constrained Land (Composite)	382	22%	
100 Year Floodplain	155	9%	70 sites with cleanup or investigation projects;
Other 1996 Inundation Area	65	4%	8 cleaned or investigated sites with "no further action required".
Title 3 Wetlands	39	2%	
10% or Greater Slope	202	12%	
Goal 5 Significant Habitat	282	16%	
Open Space or Constrained	383	22%	

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

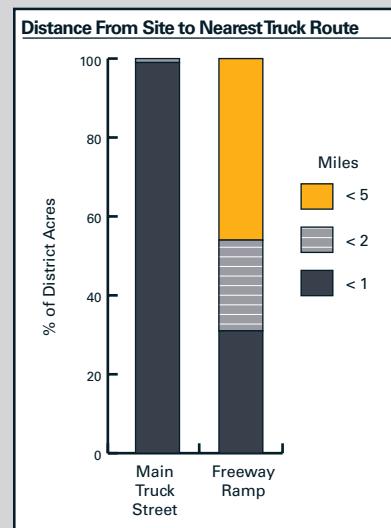
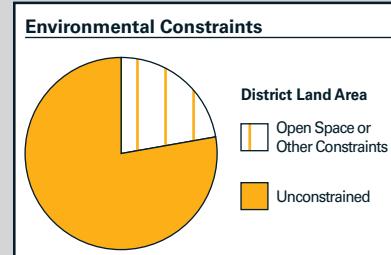
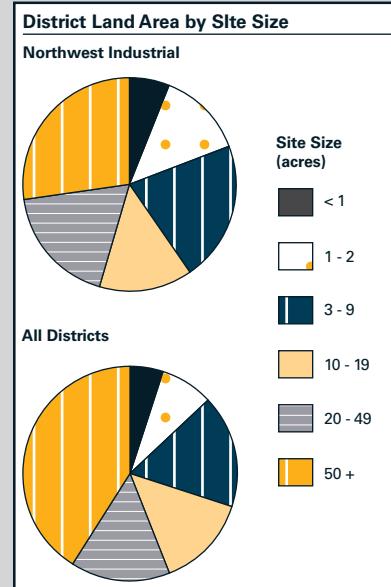
Source: Oregon DEQ - cleanup sites

PROXIMITY TO TRANSPORTATION INFRASTRUCTURE

TRUCK & TRANSIT ACCESS							
Miles from Site	Major Truck Street	Freeway Ramp		Miles from Site	Bus Stop	% of District Acres	
		Acres	% of District		Acres	% of District	
< 1	1,707	99%		532	31%	< 1/4	1,537 90%
< 2	1,717	100%		921	54%	< 1/2	1,717 100%
< 5				1,573	92%		

MULTIMODAL FREIGHT ACCESS							
	Airport	Railroad			Harbor	% of District Acres	
	Acres	% of District	Acres	% of District	Acres	% of District	
Adjacent	0	0%	1,149	67%	698	41%	
< 5	0	0%					

Source: Bureau of Planning



Growth Capacity



A vacant 11-acre site at NW Yeon and Nicolai.



Almost 100 acres of vacant properties near the railroad bridge.



Montgomery Park.

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	313	137.5	2.3	135.2	81.5	61.1	8.0
Potential Cleanup Sites	222	105.1	0.0	105.1	41.1	50.9	

* Buildable private land includes all vacant land minus identified open space, Tier F, and public and utility sites with exceptions. Tiers B-E identify sites that may be affected by availability or use constraints.

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

** 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. Identified open space is not included.

OTHER POTENTIALLY UNDERUTILIZED PROPERTY

	Cleanup/Investigation % of			Industrial Land in Residential Use**		Developed Space on Market, April 2004	
	Sites	Acres	District	Sites	Acres	Sites	Area
All Land in Sites	71	1,034	60%	61	10	For Sale	
Developed/Occupied Portion	29	727	42%			14	333,135 sf
Underutilized Portion*						For Lease	
(Potential Brownfields)	42	307	18%			41	744,177 sf
Unoccupied Sites	14	131	8%				
Vacant Land on Occupied Sites	28	175	10%				

* 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

	Sites	% of District	Acres	% of District
Urban Renewal Area	9	2%	10	1%
Enterprise Zone	236	48%	1,337	78%
New Market Tax Credits	0	0%	0	0%

Source: Portland Development Commission

CAPITAL IMPROVEMENTS PROGRAM PROJECTS

No capital projects in the current City of Portland CIP were identified that would expand the district's development capacity.

NORTHWEST INDUSTRIAL DISTRICT



Northwest Industrial District

Employment

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

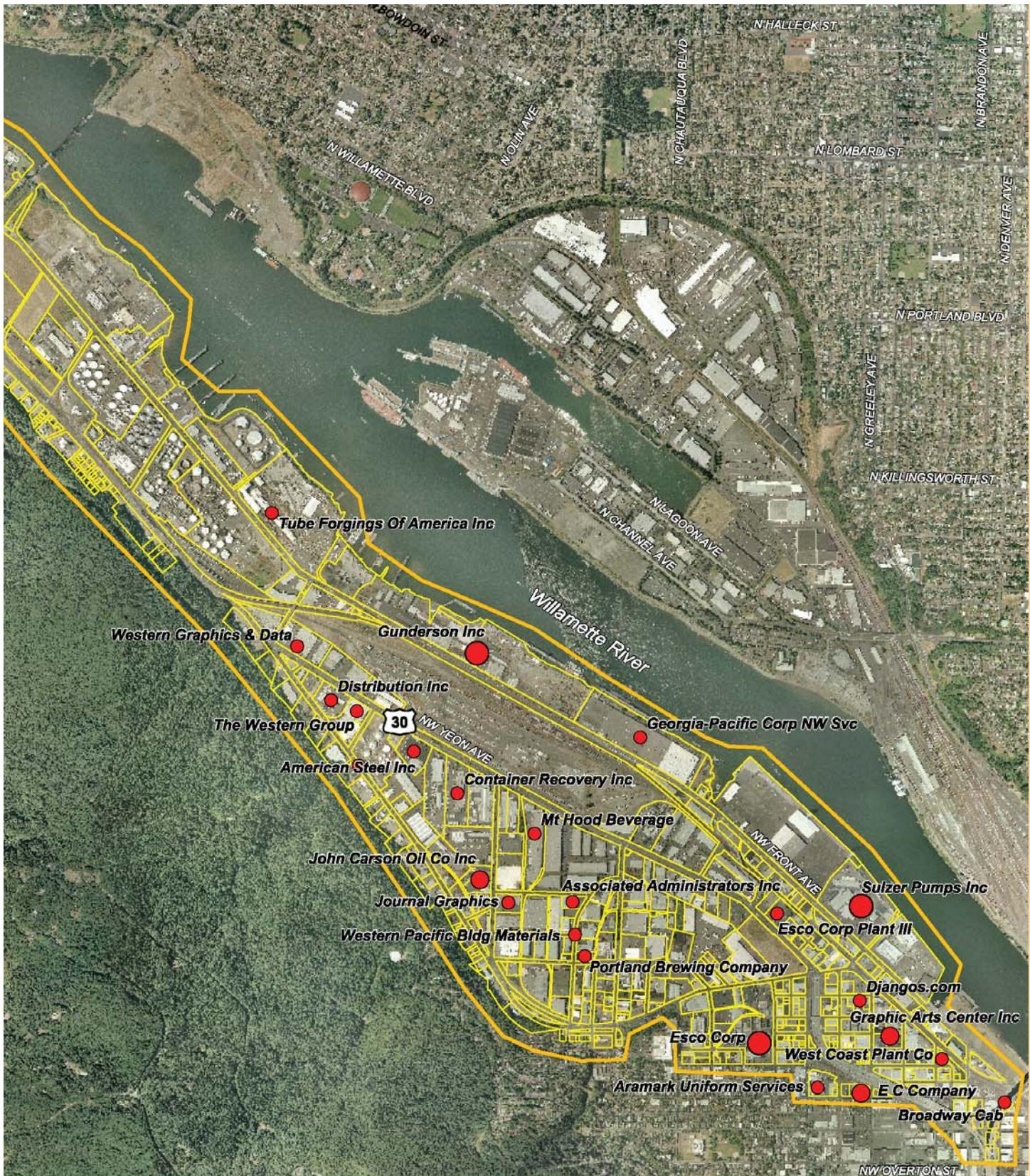
■ Site Boundary

■ Inventory Area Boundary



0 412.5 825 1,650 2,475 3,300 Feet

WEST INDUSTRIAL DISTRICT



Information Sources:

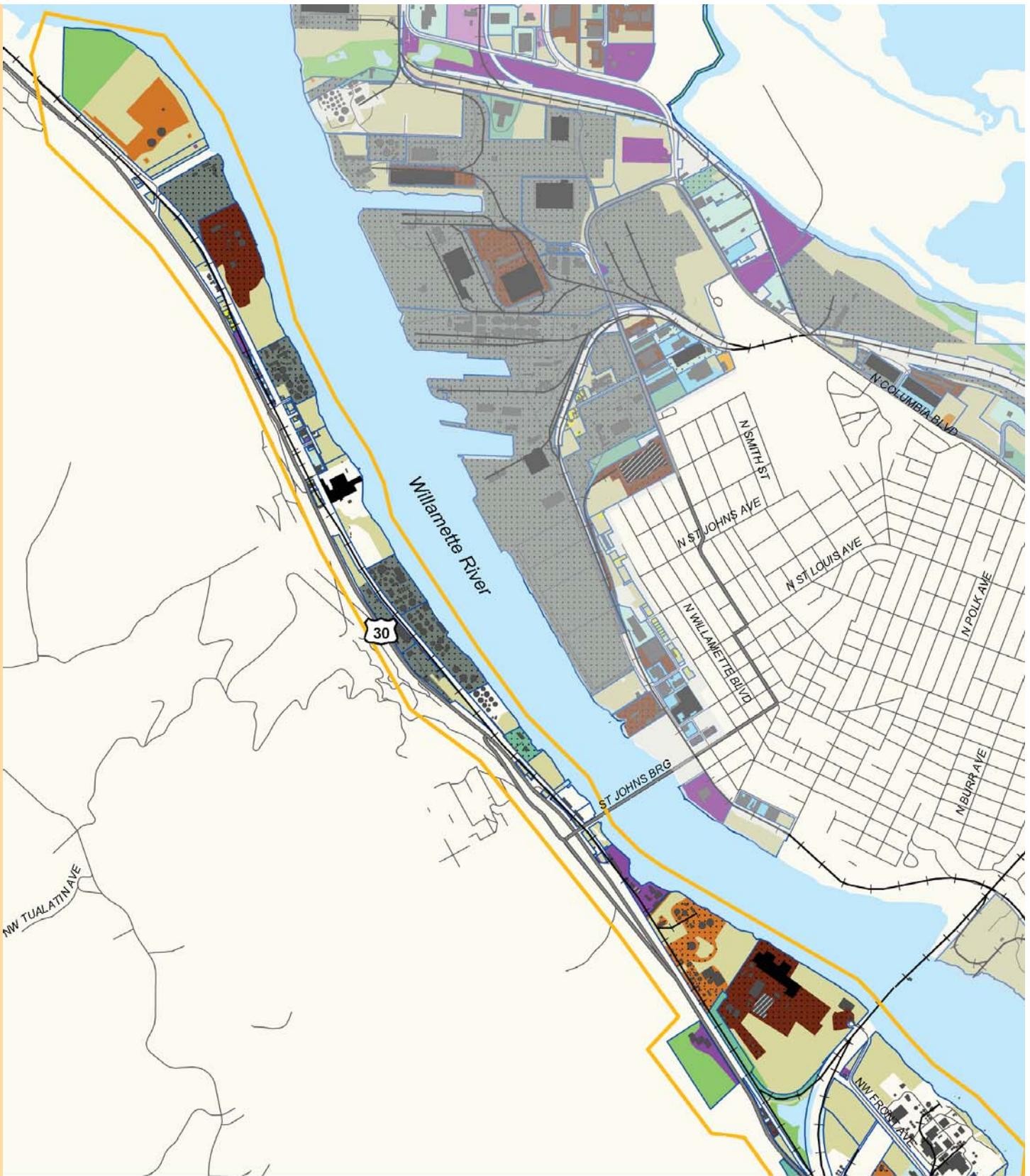
- Orthophotography - Metro Regional Consortium, 10' or 20' pixel resolution (2003).
- Sites - Bureau of Planning, based on taxlot information provided by City of Portland Corporate Geographic Information System and Multnomah County Assessment and Taxation (February 2003).
- Employers - Inside Prospects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

Investing in Portland's Future

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NORTHWEST INDUSTRIAL DISTRICT



Northwest Industrial Facilities

Heavy Industrial

Heavy Industrial (overlay)

Distribution

- Freight
- Transportation
- Wholesale

General Industrial

- Manufacturing
- Utilities
- Construction

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



0 400 800 1,600 2,400 3,200 Feet

NORTHWEST INDUSTRIAL DISTRICT



Information Sources:

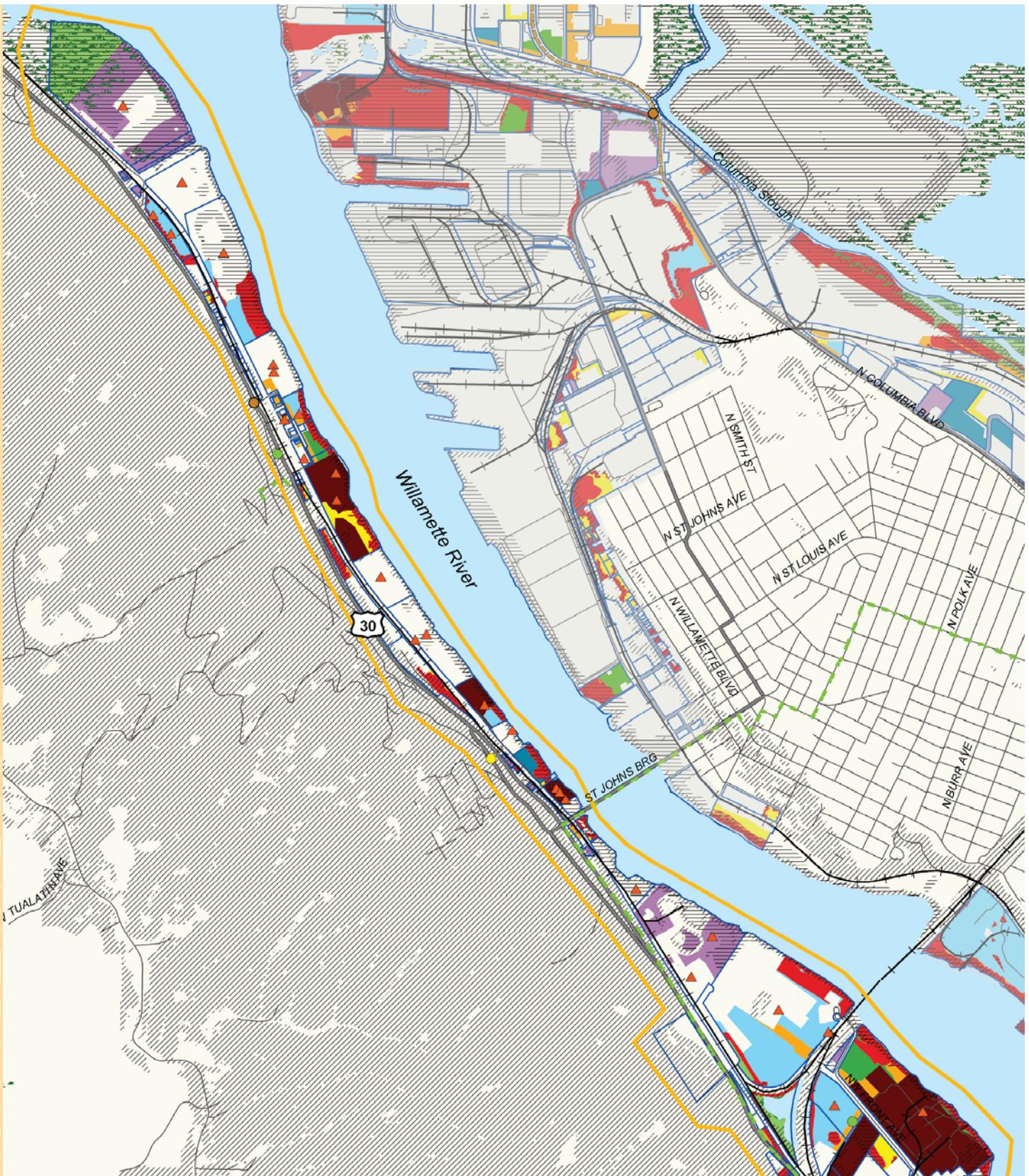
- F facilities - Bureau of Planning, based on employment data by Inside Prospects (2003), supplemented by InfoUSA data (2003) and Bureau of Planning field inspection (2004). Utility and public facilities also include unoccupied sites in corresponding ownership.
- Bureau of Planning identified freight 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.

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NORTHWEST INDUSTRIAL DISTRICT



Northwest Industrial 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
- Site Boundary
- Inventory Area Boundary

Potential Cleanup Sites

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

Environmental Constraints

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

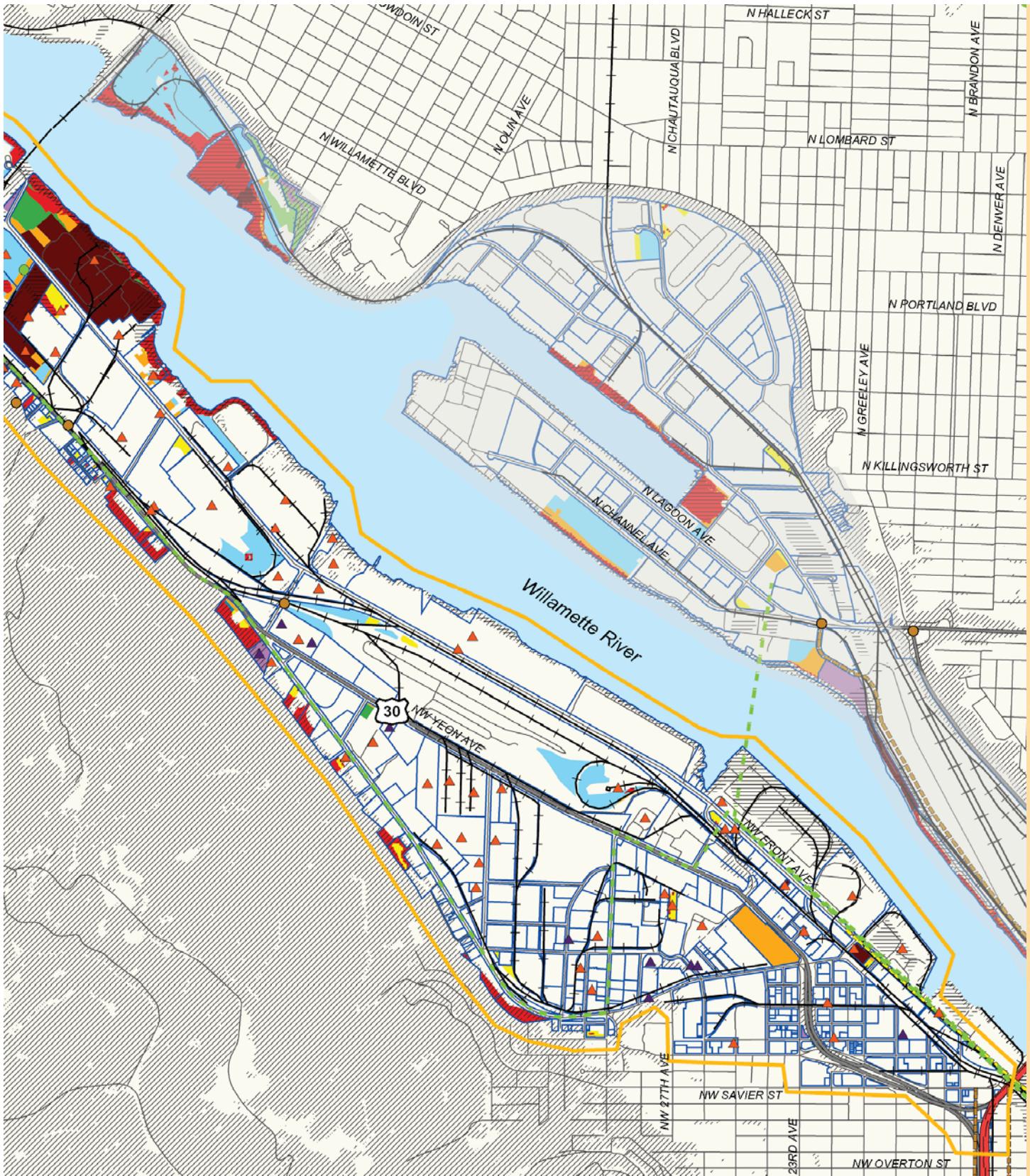
Transportation Infrastructure

- Railroads
- Freeways
- Major Truck Streets
- Streets



0 415 830 1,660 2,490 3,320 Feet

NORTHWEST INDUSTRIAL DISTRICT



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 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.

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