

# APPENDIX B: Supply and Demand in the West Eugene Industrial Area

## Introduction

The following information represents research by Economic Consultants Oregon and the Eugene Planning Department providing the underlying basis for many of the findings and recommendations. Tables I, II, and III deal with supply-side questions, while Tables IV, V, and VI deal with the demand side of industrial development.

## Supply

The following information has been compiled from the Lane County Geographic Information System's Parcel File for January 1, 1976, and updated to March 31, 1978.

Table I

## VACANT AND PARTIALLY DEVELOPED INDUSTRIALLY ZONED LAND IN LARGE PARCELS IN EUGENE AND WEST EUGENE INDUSTRIAL AREAS

|              | <u>Category I</u>  |                  | <u>Category II</u> |                  |
|--------------|--------------------|------------------|--------------------|------------------|
|              | <u>No. Parcels</u> | <u>No. Acres</u> | <u>No. Parcels</u> | <u>No. Acres</u> |
| West Eugene  | 8                  | 388.55           | 10                 | 318.6            |
| Other Eugene | -                  | -                | 3                  | 64.0             |
| Total        | 8                  | 388.55           | 13                 | 383.6            |

Category I: Parcels Suitable for Light-Medium Industrial Use

These are parcels of ten acres or more, zoned for industrial use and with access to improved arterials or arterials scheduled for improvement within the next two years.

1. Map 17-04-27, Tax Lot 400; owner, Alexander; acreage, 30.39.

Access on the north is from 1st Avenue. The southern 671 feet of this long narrow lot lies south of the A-3 Channel and is characterized by slope on the Stewart Road Knoll.

Available, 30.39 acres.

2. Map 17-04-27, Tax Lots 701 and 501; owner, Agripac; acreage, 15.13 and 2.0, respectively.

Map 17-04-26, Tax Lot 4100; owner, Agripac; acreage, 23.22.

These parcels involve contiguous ownership by Agripac. Access is from 1st Avenue for Tax Lot 501 and for Tax Lot 701 via Tax Lot 501. Access is from Seneca Road for Tax Lot 4100. A large warehouse is located on Tax Lot 4100 on an additional 6.71 acres. Tax Lot 4100 is therefore considered "partially developed" and was not reflected in the purely vacant land illustrated on Map No. 3. The land remaining in Tax Lot 4100 is, however, included in the acreage available for development and reflected in the 40.35 acre figure below.

Available, 40.35 acres.

3. Map 17-04-27, Tax Lots 402 and 404; owner, Hult; acreage, 4.91 and 15.61, respectively.

Access for Tax Lot 402 is from 1st Avenue and for Tax Lot 404 is through 402 or through 17-04-34, 34-01, under the same ownership to the west. A portion of Tax Lot 404 has been included in the Universal Industrial Park, leaving 5.8 acres remaining outside the park.

Available, 10.71 acres.

4. Map 17-04-28-1, Tax Lot 2800; owner, Camac Veneer; acreage, 29.98.

Map 17-04-27-23, Tax Lot 1100; owner, Camac Veneer; acreage, 18.71.

Access to both these parcels is from Bertelsen Road. Adjacent to this vacant lot is the Camac Veneer manufacturing plant. This property is occasionally used by Camac for storage of excess sawdust.

Available, 48.69 acres.

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5. Map 17-04-33, Tax Lots 200 and 201; owner, estate of Clyde Montag; acreage, 67.02 and 2.93, respectively.

Access to these parcels is from Bertelsen Road and West 11th Avenue. The parcel is divided approximately into north and south halves by the Amazon Channel. More recently it has been the subject of industrial subdivision on 13 acres and of a zone change request for commercial development on 15 acres.

Available, 41.95 acres.

6. Map 17-04-34, Tax Lot 200; owner, Martinson; acreage, 75.29.

Access is from Bertelsen Road. A-3 Channel divides this parcel, leaving 25.6 acres north of the A-3 Channel and marsh area.

Available, 75.29 acres.

7. Map 17-04-34, Tax Lots 3101, 3200, and 3300; owner, Hult; acreage, 61.76, 6.56, and 2.69 acres.

Access is from 1st Avenue and Stewart Road for Tax Lot 3101 and to Stewart Road or through 3101 to 1st Avenue for Lots 3200 and 3300. The recently constructed Universal Industrial Park involves 16 acres of Lot 3101. This parcel is also split by the A-3 Channel, leaving 31 acres south of the channel and outside the industrial park and another 15 acres north of the channel and west of the industrial park.

Available, 55.25 acres.

8. Map 17-04-35, Tax Lots 900 and 914; owner, Southern Pacific; acreage, 46.17 and 2.41 acres.

Access for both parcels is from 7th Avenue. Tax Lot 900 is split by 7th Avenue. It has been reduced by subdivision and new ownerships to a 20-acre parcel south of 7th and a 9-acre parcel north of Lot 914.

Available, a 20-acre parcel and a 9-acre parcel.

9. Map 17-04-35, Tax Lot 1100; owner, Lafferty; acreage, 56.92.

Access for this parcel is from Seneca Road and Stewart Road.

Available, 56.92 acres.

TOTAL CATEGORY I: 388.5 Acres

## Category II: Large Parcels With Access Constraints

This category includes parcels of more than 10 acres in Eugene with constraints in terms of access.

1. Map 17-03-32-2 1, Tax Lot 300; owner, University of Oregon; acreage, 27.84 acres.

This parcel is one of the few large industrially zoned vacant parcels outside the West Eugene Industrial Area. Its access is difficult, occurring via 8th Avenue, just east of Hilyard Street, across the Southern Pacific Railroad tracks.

Available, 27.84 acres.

2. Map 17-04-15, Tax Lot 3700; owner, Southern Pacific; acreage, 20.91.

This parcel is located east of the Oregon Electric Railroad, with access from Prairie Road. It is not located in the West Eugene Industrial Area.

Available, 20.91 acres.

3. Map 17-04-22-1 1, Tax Lot 200; owner, Southern Pacific; acreage, 15.25 acres.

This parcel is located east of Bethel Drive, west of Rikhoff Avenue and lies just west of the main switching yards of the Southern Pacific Railroad. It is not located in the West Eugene Industrial Area.

Available, 15.25 acres.

4. Map 17-04-28, Tax Lot 1400; owner, Bohemia; acreage, 42.45 acres.

This parcel lies just south of the A-3 Channel, west of the Bohemia plant on Danebo Avenue. Access is from Danebo Avenue through the Bohemia plant. The parcel also has access to the Coos Bay Branch of Southern Pacific Railroad.

Available, 42.45 acres.

5. Map 17-04-28, Tax Lots 1500, 1700, and 1799; owner, Central Manufacturing; acreage, 33.63, 10.99, and 4.19 acres, respectively.

These parcels are in contiguous ownership with the Central Manufacturing plant and access is from Danebo Avenue.

Available, 48.81 acres.

Category II: Large Parcels With Access Constraints

This category includes parcels of more than 10 acres in Eugene with constraints in terms of access.

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5. Map 17-04-28, Tax Lots 1500, 1700, and 1799; owner, Central Manufacturing; acreage, 33.63, 10.99, and 4.19 acres, respectively.

These parcels are in contiguous ownership with the Central Manufacturing plant and access is from Danebo Avenue.

Available, 48.81 acres.

6. Map 17-04-28, Tax Lot 1900; owner, Olsson; acreage, 16.15 acres.

This parcel lies north and east of Olsson manufacturing plant, with access from Danebo Avenue and to the Coos Bay Branch of the Southern Pacific Railroad to the south.

Available, 16.15 acres.

7. Map 17-04-28, Tax Lot 2505; owner, Olsson; acreage, 10.07 acres.

This property is located across Danebo Avenue from Central Manufacturing and takes access from Danebo Avenue.

Available, 10.07 acres.

8. Map 17-04-28, Tax Lots 2700 and 2701; owner, Lane County; acreage, 28.92 and 6.98 acres, respectively.

These are County-owned parcels with access from Beltline Road only. They comprise the former County land-fill site.

Available, 35.9 acres.

9. Map 17-04-33, Tax Lot 100; owner, Nielson; acreage, 34.88.

This parcel has access from the west end of 5th and 6th avenues, west of Bertelsen Road, and is adjacent to Beltline. The parcel lies just south of the A-3 Channel and west of the Stubbert Industrial Park and Western Industrial Park.

Available, 34.88 acres.

10. Map 17-04-33, Tax Lot 900 (part); owner, Superior Land Company; acreage, 79.67 acres.

This is the vacant portion of a 123.6 acre tax lot which also contains the West Pacific Drag Strip. It is located at the northwest corner of Danebo and West 11th avenues, with access from both.

Available, 79.67 acres.

11. Map 17-04-33, Tax Lot 1300; owner, Glanz; acreage, 11.94 acres.

Located between Danebo Avenue and Beltline Road, this property has access to Danebo, through a contiguously owned single-family parcel of 2.94 acres.

Available, 11.94 acres.

12. Map 17-04-33, Tax Lot 1701; owner, Cuddeback; acreage, 20.43 acres.

This property is north of a contiguously owned industrial plant and has access to West 11th Avenue. It is occasionally used as a site for storage of logs from the adjacent mill. The portion of the tax lot referred to is inside the city, the remainder lies outside city limits.

Available, 20.43 acres.

13. Map 17-04-34, Tax Lot 500; owner, Jacobs; acreage, 24.25 acres.

No longer available as a 10-or-more acre parcel.

14. Map 17-04-34, Tax Lot 2900; owner, Owen; acreage, 19.3 acres.

This parcel is north of Stewart Road on a sloping knoll and takes access from Stewart.

Available, 19.30 acres.

TOTAL CATEGORY II: 383.60 acres

PD:er/PL77a19

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Table II  
LAND USE AND ZONING IN THE WEST EUGENE INDUSTRIAL AREA (number of acres)

| Land Use Categories*   | M-1 SR | M-2    | M-3      | M-3 SR | C-1 SR | C-2  | RA    | RG    | RG/SR | PL    | RW    | AG | Total    |
|------------------------|--------|--------|----------|--------|--------|------|-------|-------|-------|-------|-------|----|----------|
| Vacant                 | 2.42   | 216.65 | 958.52   | 0      |        | .02  | 1.88  | .75   | 0     | .61   | .35   | 0  | 1,181.21 |
| Commercial and Service | 1.19   | 91.77  | 256.02   | 0      | 0      | 2.20 | 0     | 1.31  | 0     | 36.01 | 0     | 0  | 390.01   |
| Industrial             | 0      | 70.87  | 456.87   | 1.00   | .41    | .31  | 0     | 0     | 0     | 0     | 52.91 | 0  | 582.38   |
| Residential            | .68    | 29.66  | 42.63    | 0      | 0      | 0    | 12.69 | 14.43 | .21   | 0     | 0     | 0  | 100.28   |
| Other                  | 0      | 73.30  | 113.59   | .50    | 0      | 3.04 | 2.30  | 3.24  | 0     | 3.56  | 43.94 | 0  | 243.46   |
| Total Acres            | 4.29   | 482.25 | 1,827.62 | 1.50   | .41    | 5.58 | 16.87 | 19.73 | .21   | 40.18 | 97.19 | 0  | 2,497.35 |

Source: Compiled by the Eugene Planning Department from Lane County Geographic Information System's Parcel File, January 1, 1976.

\* Vacant--Includes parcels used as agricultural land.

Commercial and Service--Includes recreation, retail trade, and services.

Industrial--Includes manufacturing, wholesale trade, transportation (including warehousing), communication, and utilities.

Residential--Includes mobile homes, group quarters, and both single-family and multiple-family residences.

Other--Includes roads and parking, bodies of water, and uses not otherwise classified.

Table III

VACANT ACRES, LAND BY PARCEL SIZE AND ZONING IN THE  
WEST EUGENE INDUSTRIAL AREA

| Zoning | SIZE (Acres)                    |                  |                    |                    |                     |                      |          | Total |
|--------|---------------------------------|------------------|--------------------|--------------------|---------------------|----------------------|----------|-------|
|        | Greater Than<br>GT LT<br>0 - .5 | GT LT<br>5 - 1.0 | GT LT<br>1.0 - 2.0 | GT LT<br>2.0 - 6.0 | GT LT<br>6.0 - 10.0 | Greater Than<br>10.0 |          |       |
| C-2    | 0.02                            | 0.00             | 0.00               | 0.00               | 0.00                | 0.00                 | 0.02     |       |
| M-1SR  | 0.00                            | 0.95             | 1.46               | 0.00               | 0.00                | 0.00                 | 2.41     |       |
| M-2    | 20.88                           | 32.23            | 31.76              | 97.53              | 12.85               | 20.42                | 215.67   |       |
| M-3    | 8.59                            | 17.79            | 40.43              | 78.77              | 69.43               | 742.84               | 957.85   |       |
| PL     | 0.00                            | 0.60             | 0.00               | 0.00               | 0.00                | 0.00                 | 0.60     |       |
| RA     | 0.83                            | 0.00             | 1.03               | 0.00               | 0.00                | 0.00                 | 1.86     |       |
| RW     | 0.34                            | 0.00             | 0.00               | 0.00               | 0.00                | 0.00                 | 0.34     |       |
| RG     | 0.73                            | 0.00             | 0.00               | 0.00               | 0.00                | 0.00                 | 0.73     |       |
| Total  | 31.39                           | 51.57            | 74.68              | 176.30             | 82.28               | 763.26               | 1,179.48 |       |

Source: Compiled by the Eugene Planning Department from Lane County Geographic Information System's Parcel File, January 1, 1976.



Table III  
VACANT ACRES, LAND BY PARCEL SIZE AND ZONING IN THE  
WEST EUGENE INDUSTRIAL AREA

| Zoning | SIZE (Acres)                    |                               |                 |                 |                  |                         | Total    |
|--------|---------------------------------|-------------------------------|-----------------|-----------------|------------------|-------------------------|----------|
|        | Greater<br>Than<br>GT<br>0 - .5 | Less<br>Than<br>LT<br>5 - 1.0 | GT<br>1.0 - 2.0 | LT<br>2.0 - 6.0 | GT<br>6.0 - 10.0 | Greater<br>Than<br>10.0 |          |
|        |                                 |                               |                 |                 |                  |                         |          |
| C-2    | 0.02                            | 0.00                          | 0.00            | 0.00            | 0.00             | 0.00                    | 0.02     |
| M-1SR  | 0.00                            | 0.95                          | 1.46            | 0.00            | 0.00             | 0.00                    | 2.41     |
| M-2    | 20.88                           | 32.23                         | 31.76           | 97.53           | 12.85            | 20.42                   | 215.67   |
| M-3    | 8.59                            | 17.79                         | 40.43           | 78.77           | 69.43            | 742.84                  | 957.85   |
| PL     | 0.00                            | 0.60                          | 0.00            | 0.00            | 0.00             | 0.00                    | 0.60     |
| RA     | 0.83                            | 0.00                          | 1.03            | 0.00            | 0.00             | 0.00                    | 1.86     |
| RW     | 0.34                            | 0.00                          | 0.00            | 0.00            | 0.00             | 0.00                    | 0.34     |
| RG     | 0.73                            | 0.00                          | 0.00            | 0.00            | 0.00             | 0.00                    | 0.73     |
| Total  | 31.39                           | 51.57                         | 74.68           | 176.30          | 82.28            | 763.26                  | 1,179.48 |

Source: Compiled by the Eugene Planning Department from Lane County Geographic Information System's Parcel File, January 1, 1976.

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#### Demand

The following information has been derived from a variety of sources with the relevant source indicated at the bottom of each table.

TABLE IV

YEARLY AVERAGES OF U.S. EMPLOYMENT IN SELECTED MANUFACTURING  
INDUSTRIES: 1970, 1972, 1974, 1976 (in thousands)

|   | 1970  | 1972  | 1974  | 1976  | 1970-1976<br>% Increase |
|---|-------|-------|-------|-------|-------------------------|
| Office, Computing, and<br>Accounting Machines (SIC 357)   | 284.7 | 245.4 | 294.4 | 291.9 | 2.5%                    |
| Electronic Computing Equipment<br>(SIC 3573)  | 190.2 | 172.0 | 211.7 | 219.6 | 15.5                    |
| Semiconductors and Related<br>Devices; and Other Electronic<br>Components (SIC 3674 & SIC 3679) | 288.1 | 289.9 | 379.9 | 330.0 | 14.5                    |
| Optical & Ophthalmic Goods<br>(SIC 383 & SIC 385)   | 53.7  | 54.4  | 66.5  | 64.0  | 19.2                    |
| Medical Instruments and<br>Supplies (SIC 384)   | 84.9  | 90.4  | 107.1 | 108.8 | 28.2                    |
| Photographic Equipment and<br>Supplies (SIC 286)  | 110.3 | 112.8 | 130.6 | 129.6 | 17.5                    |

SOURCE: U.S. Department of Labor, Bureau of Labor Statistics, EMPLOYMENT AND  
EARNINGS, February-March, 1971, 1973, 1975, 1977.

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Table V

PROJECTIONS OF TOTAL INDUSTRIAL EMPLOYMENT IN EUGENE  
AND THE METRO AREA: 1980, 1985, 1990, 1995, 2000\*  
(rounded to nearest 10 employees)

|                                       | 1977<br>Actual† | 1980** | 1985   | 1990   | 1995   | 2000   |
|---------------------------------------|-----------------|--------|--------|--------|--------|--------|
| Part 1: Eugene                        |                 |        |        |        |        |        |
| Heavy Industrial//                    | 3,245           | 3,193  | 3,187  | 3,162  | 3,124  | 3,098  |
| Light Industrial***                   | 8,717           | 9,506  | 11,626 | 13,439 | 15,205 | 17,084 |
| Part 2: Eugene-Springfield Metro Area |                 |        |        |        |        |        |
| Heavy Industrial                      | 8,618           | 8,411  | 8,315  | 8,148  | 7,961  | 7,794  |
| Light Industrial                      | 12,185          | 13,729 | 16,345 | 18,942 | 21,469 | 24,156 |
| Part 3: Lane County                   |                 |        |        |        |        |        |
| Heavy Industrial                      | 12,450          | 13,140 | 12,880 | 12,620 | 12,270 | 11,930 |
| Light Industrial                      | 11,790          | 15,300 | 18,180 | 20,950 | 23,740 | 26,680 |

\* We derive these projections from the projections for Lane County's total employment. Lane County: Population, Households, and Employment, Eugene, Oregon, Lane Council of Governments (L-COG), February 1978.

† We estimated total employment for 1977 in Eugene based on the following assumptions: 1) Eugene captured a share of the 1977 non-farm wage-and-salary employment for each sector equal to the simple average of the shares for each sector Eugene captured in April 1974 and March 1976; 2) Total employment in "lumber and wood" equals 1.023 times wage-and-salary employment in "lumber and wood"; total employment in "other durable" equals 1.037 times wage-and-salary employment in "other durable"; total employment in "food products"; and total employment in "other nondurable" equals 1.050 times wage-and-salary employment in "other nondurable."

\*\* We based our projections for Eugene and Eugene-Springfield on the assumption that the cities will maintain through 2000 the same share of Lane County's employment in the sectors comprising heavy and light industrial employment as they averaged in February and March 1976. These assumed shares were then imposed on Lane County employment projections based on April figures. The February and March shares may differ from the April share, but we cannot determine Eugene's employment by sector in April 1976. We obtained the projections for the Metro Area from Metro Plan Update, Residential, Commercial, Industrial, and Public Facility Land-Use Needs, Eugene, Oregon, L-COG, February 1978.

†† We based our estimates of "heavy industrial" employment on the definitions and assumptions of L-COG's research division used in L-COG, Metro Plan Update, cited elsewhere. L-COG's research division first defines "heavy manufacturing employment" as 100 percent of employment in lumber and wood products, 15 percent of

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|---------------------------------------|-----------------|--------|--------|--------|--------|--------|
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| Heavy Industrial††                    | 3,245           | 3,193  | 3,187  | 3,162  | 3,124  | 3,098  |
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| Heavy Industrial                      | 12,450          | 13,140 | 12,880 | 12,620 | 12,270 | 11,930 |
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\*\* We based our projections for Eugene and Eugene-Springfield on the assumption that the cities will maintain through 2000 the same share of Lane County's employment in the sectors comprising heavy and light industrial employment as they averaged in February and March 1976. These assumed shares were then imposed on Lane County employment projections based on April 1977 figures. The February and March shares may differ from the April share, but we cannot determine Eugene's employment by sector in April 1976. We obtained the projections for the Metro Area from Metro Plan Update, Residential, Commercial, Industrial, and Public Facility Land-Use Needs, Eugene, Oregon, L-COG, February 1978.

†† We based our estimates of "heavy industrial" employment on the definitions and assumptions of L-COG's research division used in L-COG, Metro Plan Update, cited elsewhere. L-COG's research division first defines "heavy manufacturing employment" as 100 percent of employment in lumber and wood products, 15 percent of

Footnotes to Table V (continued)

employment in durables other than lumber and wood products (i.e., Standard Industrial Classification (SIC) Code 24, and 6 percent of employment in nondurables other than food and kindred products (i.e., SIC Codes 22, 23, 26-31 (inclusive)). Then L-COG's research division assumes 90 percent of "heavy manufacturing employment" consists of "heavy industrial employment," as designated by the Metro Plan, and 10 percent of "heavy manufacturing employment" consists of "commercial employment." This heavy industrial includes 90 percent of employment in lumber and wood products, 13.5 percent (i.e., 90 percent of 15 percent) of durables (SIC Codes 25, 32-39), and 5.4 percent (i.e., 90 percent of 6 percent) of nondurables other than food and kindred (SIC Codes 22, 23, 26-31).

\*\*\* We based our estimates of "light industrial" employment on the definitions and assumptions of L-COG's research division (see it above). L-COG's research division first defines "light-medium manufacturing employment" as 100 percent employment in food and kindred products (SIC Code 20), 85 percent of employment in durables other than lumber and wood products (i.e., SIC Codes 22, 23, 25-31). Then L-COG's research division assumes 90 percent of "light-medium manufacturing employment," transportation, communication and utilities employment, and wholesale-trade employment, consists of "light-industrial employment," as designated by the Metro Plan, and 10 percent of all these categories consists of "commercial employment." Thus, light industrial includes 90 percent of employment in food and kindred products, transportation, communication and utilities, and wholesale trade, 76.5 percent (i.e., 90 percent of 85 percent) of durables other than lumber and wood products (SIC Codes 25, 32-39), and 84.6 percent (i.e., 90 percent of 94 percent) of other nondurables (SIC Codes 22, 23, 25-31).