



Buildable Land Inventory and Economic Opportunities Analysis



Bureau of Planning and Sustainability
Innovation. Collaboration. Practical Solutions.



Comprehensive Plan Update

- Task 2 Background Reports – Factual Basis
 - Economic Opportunities Analysis (EOA)
- Comp Plan
 - Policies
 - Map
 - Infrastructure Project List



Economic Opportunities Analysis

1. Recent Trends and Market Factors
2. Employment Growth Forecast (Demand)
3. Land Development Capacity (Supply)

Reconciliation – Surpluses and Shortfalls

4. Proposed Comp Plan Analysis



Version Control

- 2009 Draft
 - 2012 Re-write → Adoption
-
- Jan 2015 – Revised Draft ← *We are here*
 - Mar 2015 – Proposed Draft
 - May 2015 – PSC Recommended Draft
 - Fall 2015 – City Council Adopted (Final)



Employment Geographies

Central City

Central City Commercial

Central City Industrial

Industrial

Harbor and Airport Districts

Harbor Access Lands

Columbia East (east of 82nd Ave)

Dispersed Employment

Commercial

Gateway Regional Center

Town Centers

Neighborhood Commercial

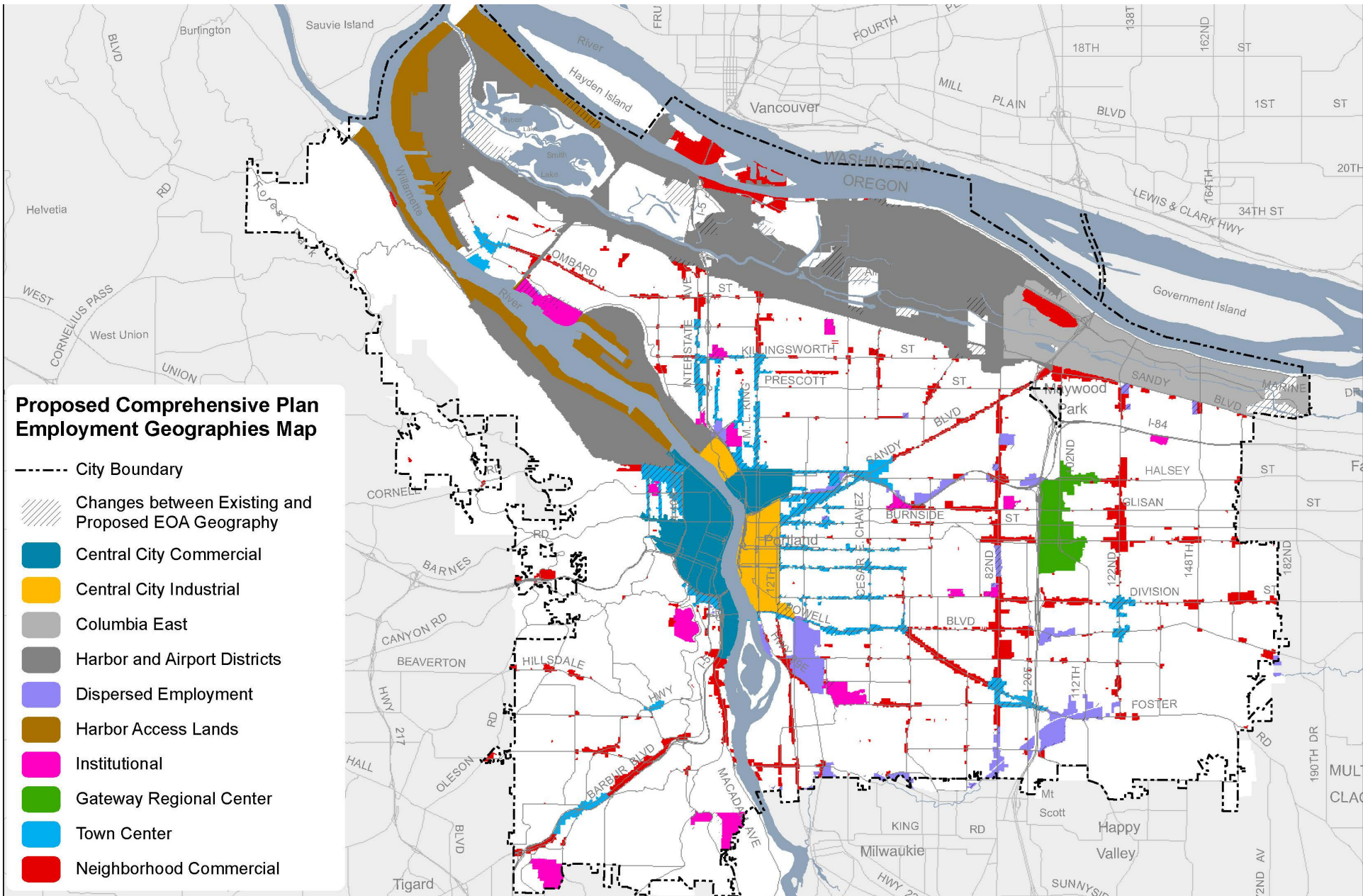
Institutions

Campus Institutions

Residential

Areas not included in other geographies





Proposed Comprehensive Plan Employment Geographies Map

- City Boundary
- //// Changes between Existing and Proposed EOA Geography
- Central City Commercial
- Central City Industrial
- Columbia East
- Harbor and Airport Districts
- Dispersed Employment
- Harbor Access Lands
- Institutional
- Gateway Regional Center
- Town Center
- Neighborhood Commercial

December 18, 2014

City of Portland, Oregon // Bureau of Planning & Sustainability // Geographic Information System

The information on this map was derived from City of Portland GIS databases. Care was taken in the creation of this map but it is provided "as is". The City of Portland cannot accept any responsibility for error, omissions or positional accuracy.

\\bpsfile\common\$\limit\employment_data\EOA_2014_Geography\maps\85x11_proposed_CompPlan_EOA_2014.mxd



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City of Portland, Oregon
Charlie Hales, Mayor • Susan Anderson, Director

2035 Employment Forecast

Metro Dec 2012 regional forecast

- Portland allocation: 142,000 new jobs
- 1.3% average annual growth rate
- 26% capture rate

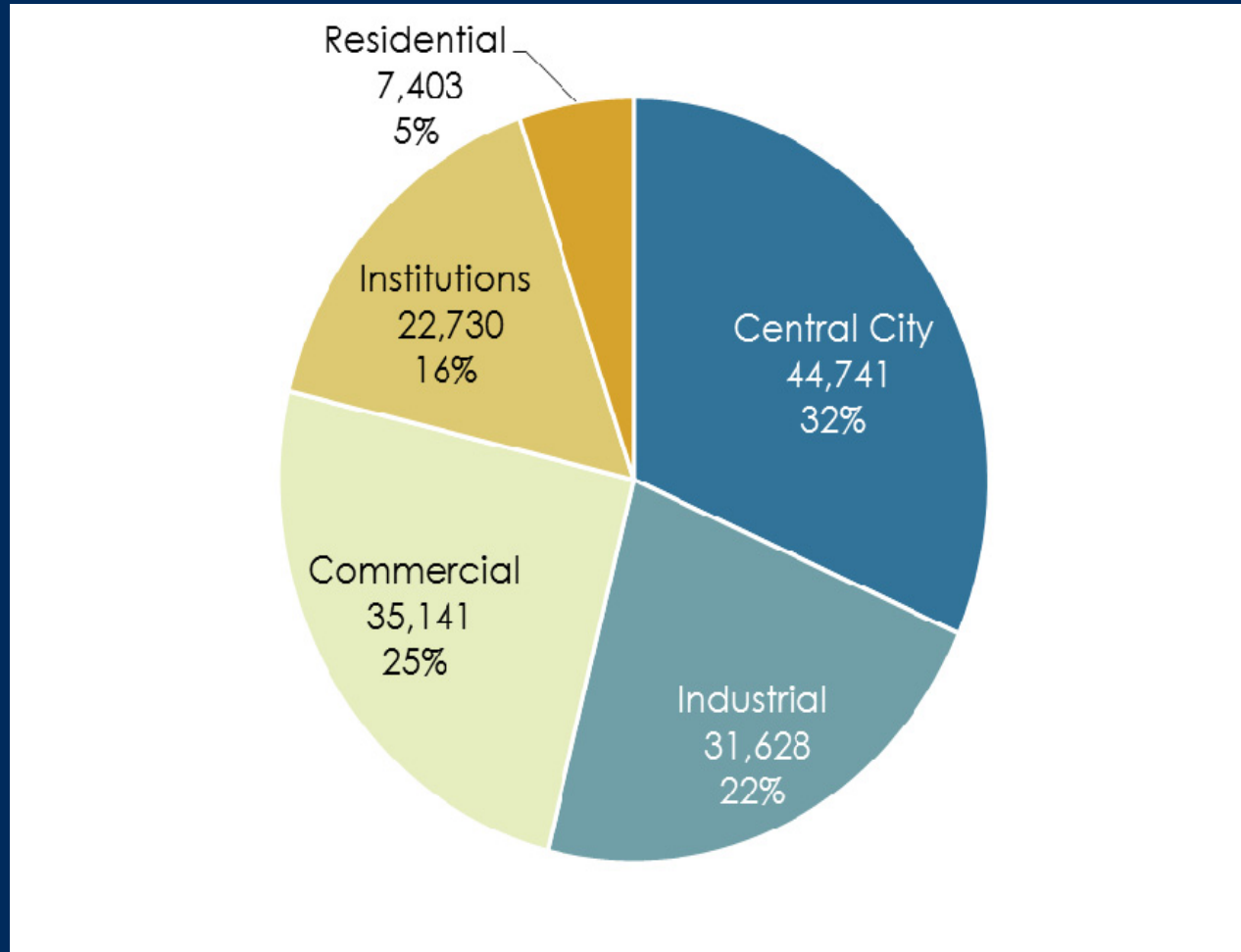


Forecast Methodology

1. Metro Regional Employment Forecast
2. Allocation to Employment Geography
3. Allocation by Building Type
4. Building Space per Employee
5. Intensity of Development (FAR)
6. Building square feet converted into land area (acres)



2035 Employment Forecast



Traded Sector Facilities

PDX Aviation Support	40 acres
Railyard Expansion	200 acres
Marine Terminal	110 acres
<hr/>	
Total	350 acres



Employment Land Demand

	Added Jobs	Total Acres
Central City	44,740	150
Industrial	31,630	1,700
Commercial	35,140	690
Institutions	22,730	370
Residential	7,400	-
<hr/>		
Total	141,640	2,910

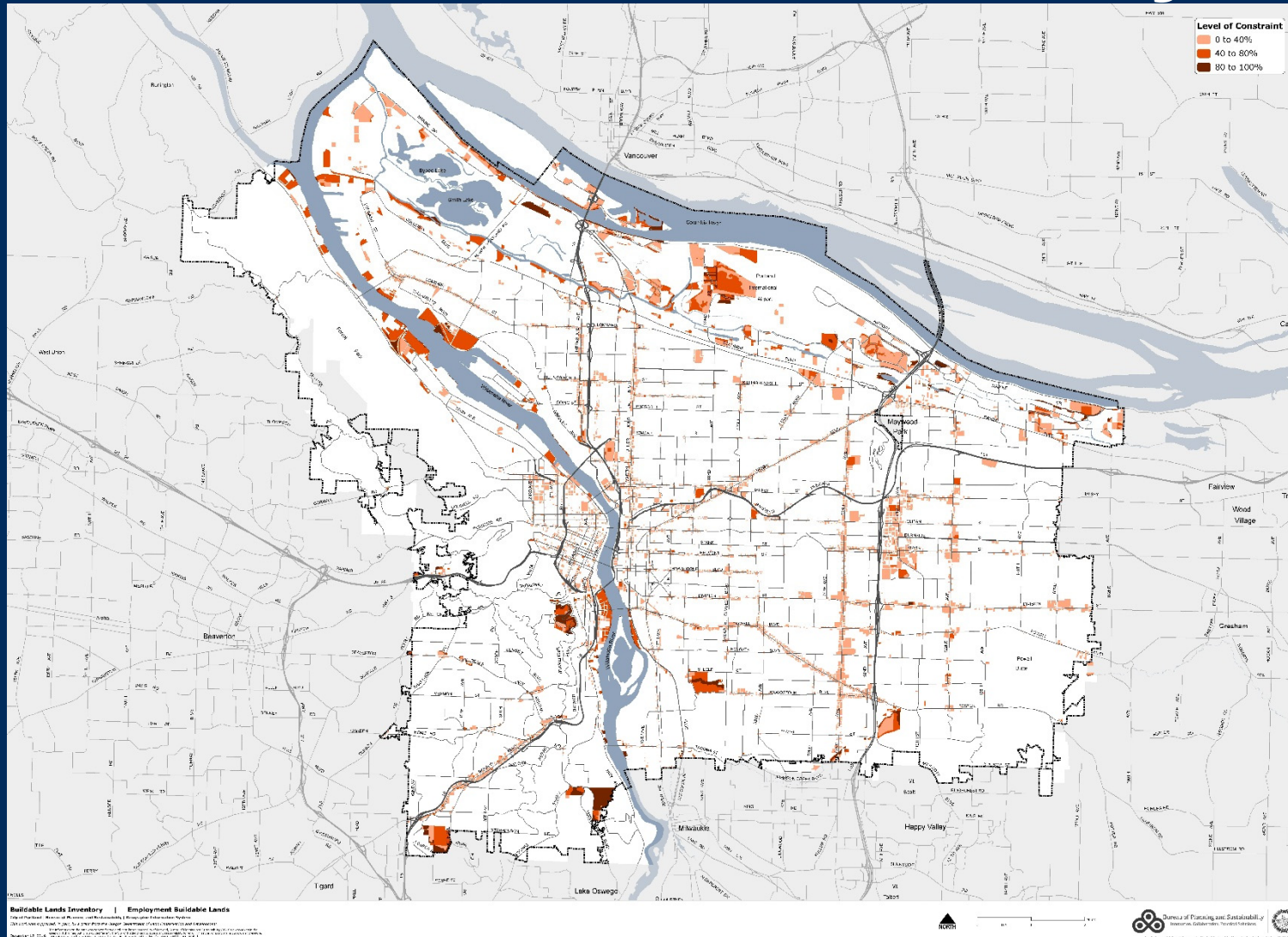


Buildable Land Inventory

1. Identify vacant land
2. Identify land likely to redevelop
3. Discount capacity based on physical constraints
4. Adjust capacity for mixed use development and market factors



Buildable Land Inventory



Employment Land Need Reconciliation

	Demand		Supply	
	Added Jobs	Land (acres)	Proposed Plan	Surplus/ Deficit
Central City	44,740	150	266	116
Industrial	31,630	1,700	1,813	113
Commercial	35,140	690	1,463	773
Institutions	22,730	370	522	152
Total	141,640	2,910	4,064	



EOA Next Steps

PSC

April 14, 12:30pm

City Council

Fall 2015

DLCD/LCDC

Review/Acknowledgement





Chapter 6

Economic Development

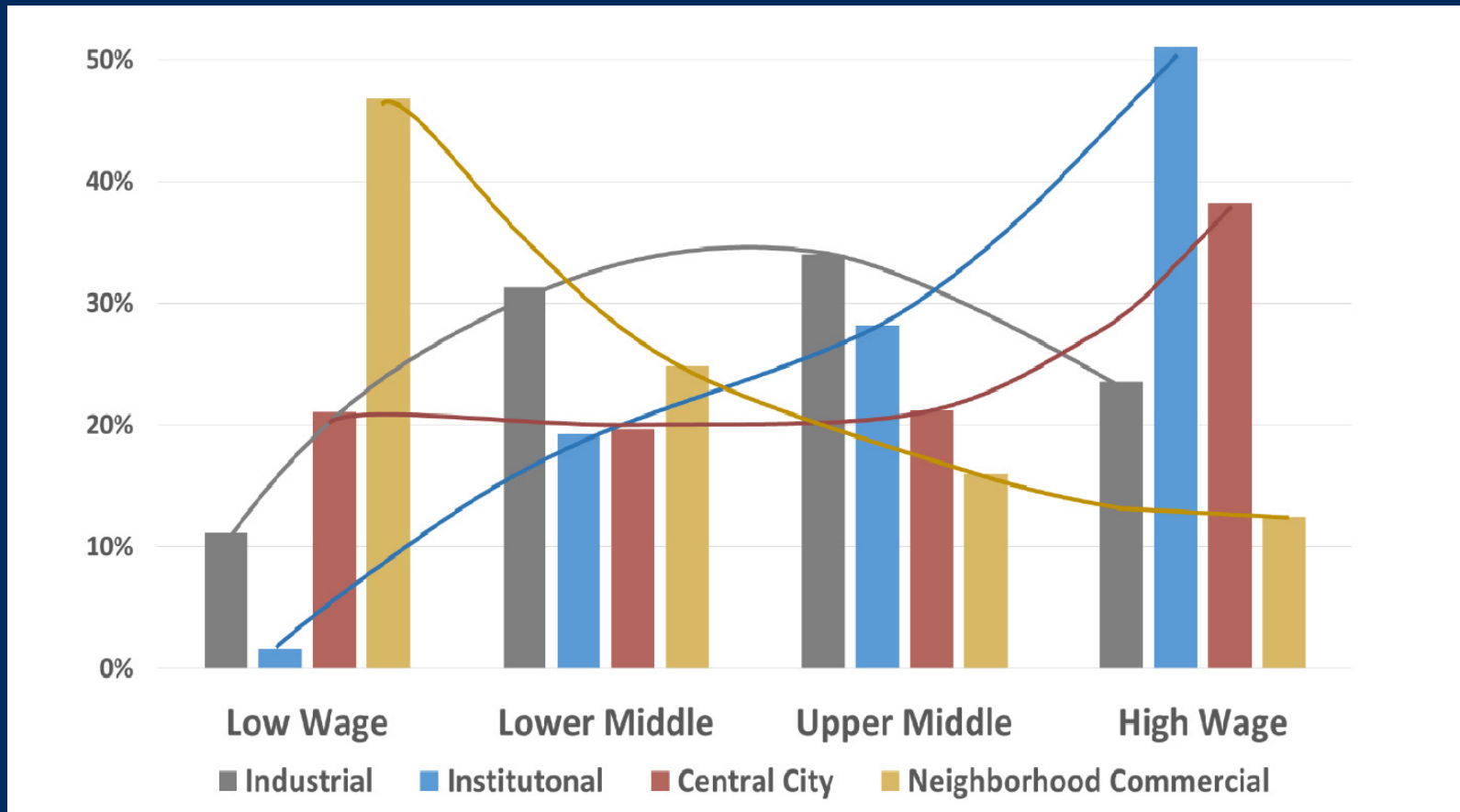


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Issue A. Economic Equity

2012 Wage Quartile Comparison of Portland's Employment



Issue A. Economic Equity

- **Policy 6.27 Income self-sufficiency.** Improve access to self-sufficient wage levels and career ladders for low-income people by maintaining an adequate and viable supply of employment land and public facilities to support and expand opportunities in Portland for middle and high wage jobs that do not require a 4-year college degree. Evaluate plans and investments for their impact on middle and high wage job creation and retention.
- **NEW 6.1. Diverse, growing community.** Expand economic opportunity and improve economic equity for Portland's diverse, growing population through sustained business growth



Issue B. Economic/environmental policies

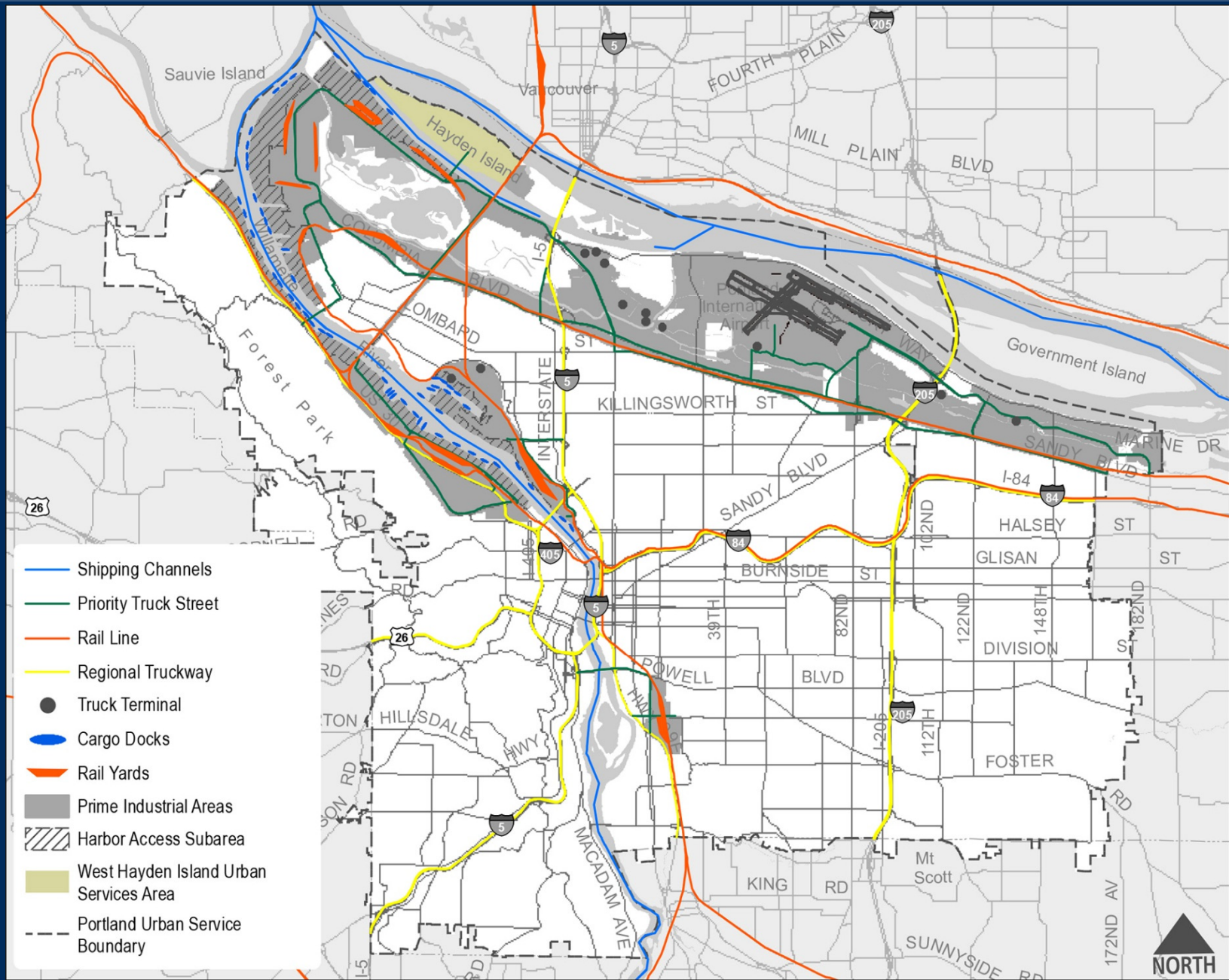
- Industrial Lands/Watershed Health Strategy
 - Retention and protection of prime industrial land
 - Intensification and reinvestment (Issue D)
 - Brownfield redevelopment (Issue D)
 - Map changes
 - Capacity Management



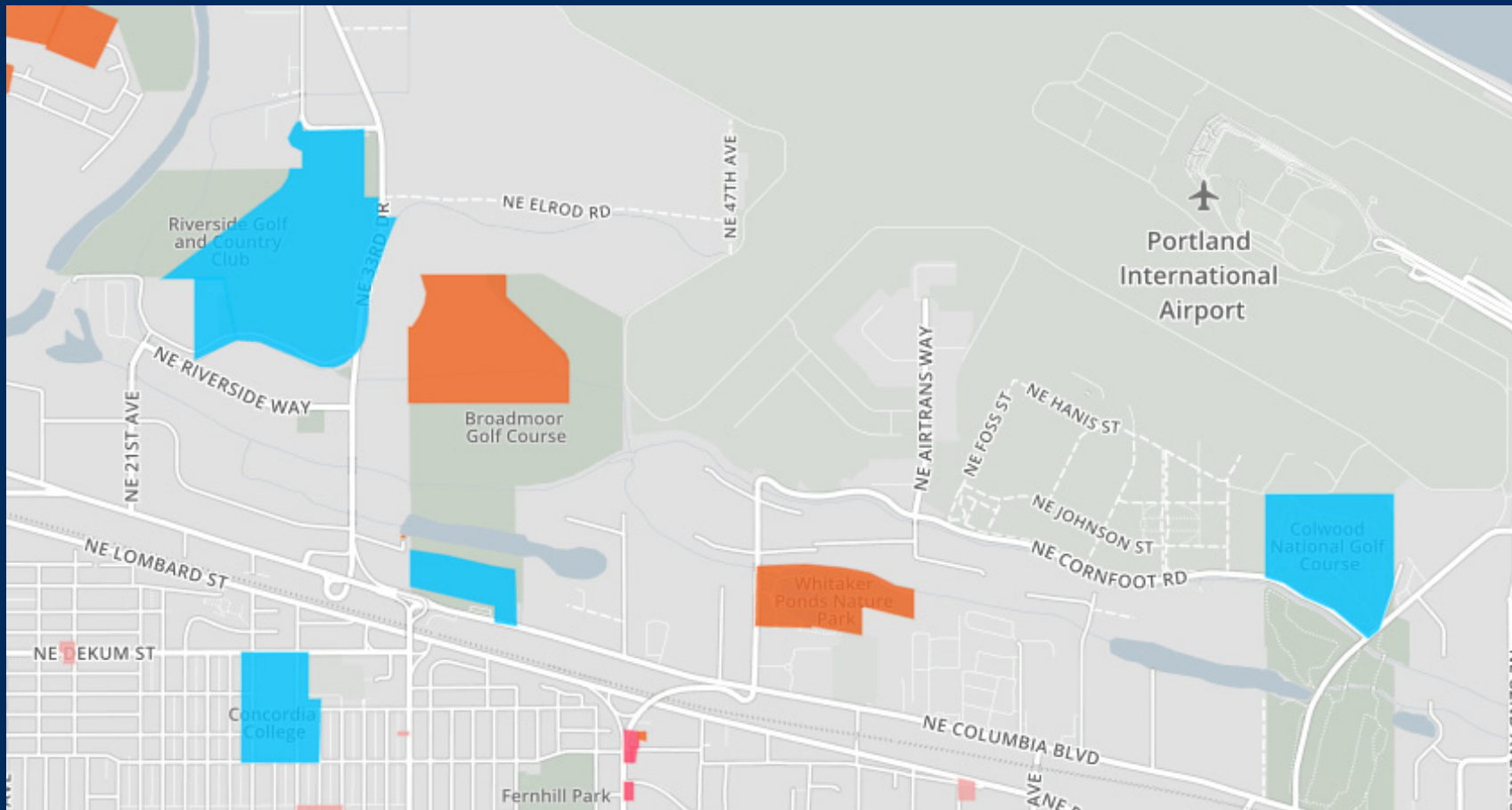
Industrial Land Capacity

Proposed IL/WH Strategies	Capacity (acres)
Industrial land retention	52
Brownfield redevelopment	124
Industrial land intensification	192
Airport golf courses	123





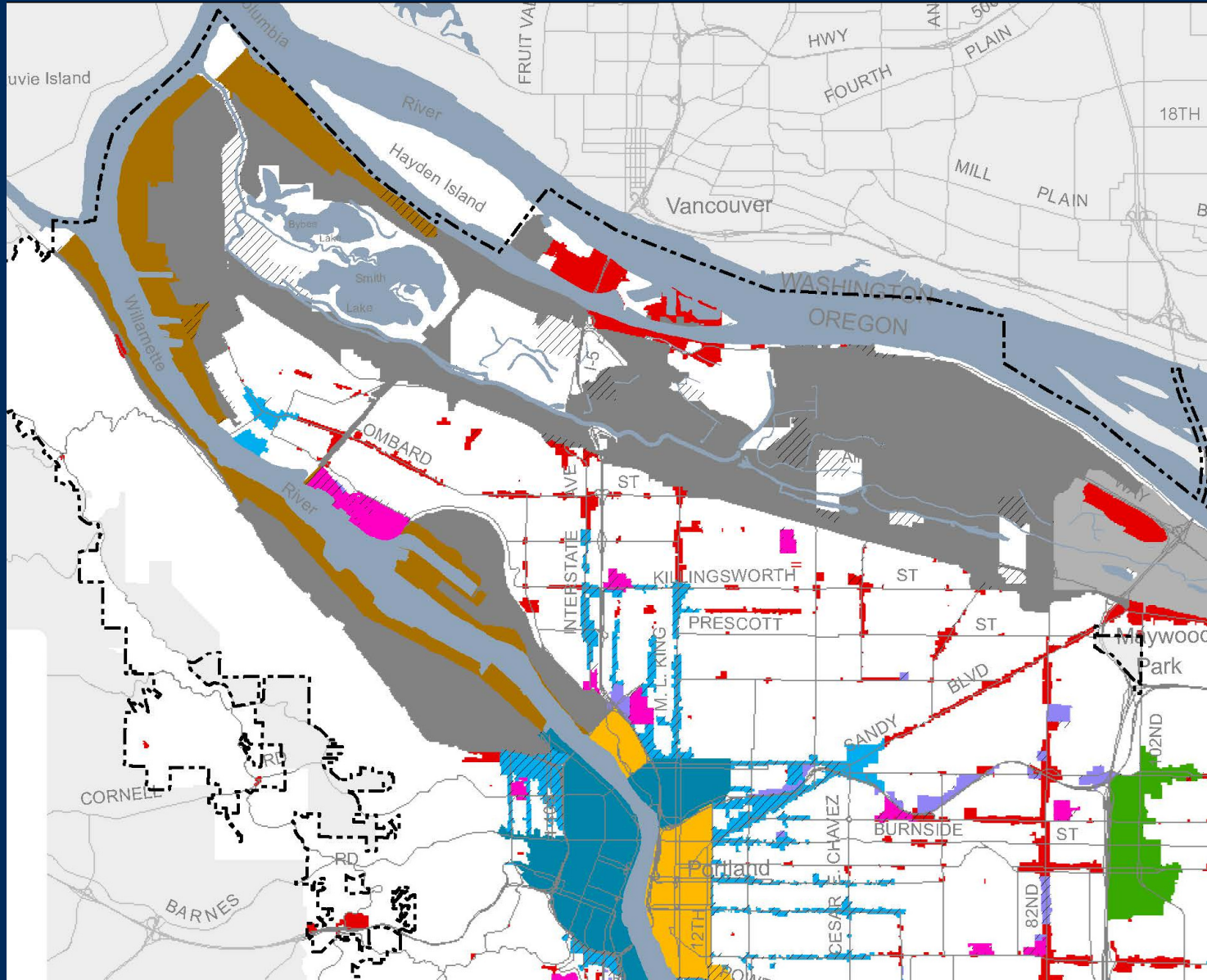
Proposed Map Changes for Airport Area Golf Courses



Issue C: Harbor Access Lands

- West Hayden Island
- Marine terminal land needs
- Harbor Access Lands needs





West Hayden Island

- Map designation as Rural Farm/Forest
- Policy 6.41 provides guidance for future annexation:
 - 300 acres for future deep water marine terminal, with operationally viable rail access
 - Permanently protect and enhance at least 500 acres as open space
 - Address local quality of life, public health, and traffic impacts
 - Achieve a net increase in ecosystem function



Metro Policy Consistency

- Title 3: Water Quality, Flood Management, and Fish and Wildlife Conservation – WHI is exempt
- Title 4: Industrial and Other Employment Areas – WHI is designated Regional Significant Industrial Area (RSIA)
- Title 13: Nature in Neighborhoods – WHI is Moderate Habitat Conservation Area
- Title 13: City of Portland develop a District Plan, in cooperation with the Port of Portland



Harbor Access Lands

- Selecting “low” commodity movement forecast
- Small 33 acre shortfall
- Shift some jobs/development to other industrial areas



Issue D: Freight System and Brownfields

- Intensification – 15% of new jobs in existing businesses/developed sites (192 acres)
- Brownfield redevelopment – increase rate from 40% to 60% (124 acres)
- Brownfield redevelopment – Portland Harbor Superfund



Strategic Freight Investments

- N Rivergate grade separation
- NE 33rd Ave Improvements
- Kenton Line capacity and overcrossings
- Time Oil Road reconstruction
- N Hayden Island Dr.
- Willamette channel deepening
- T-4 and T-6 improvements



Brownfield Redevelopment

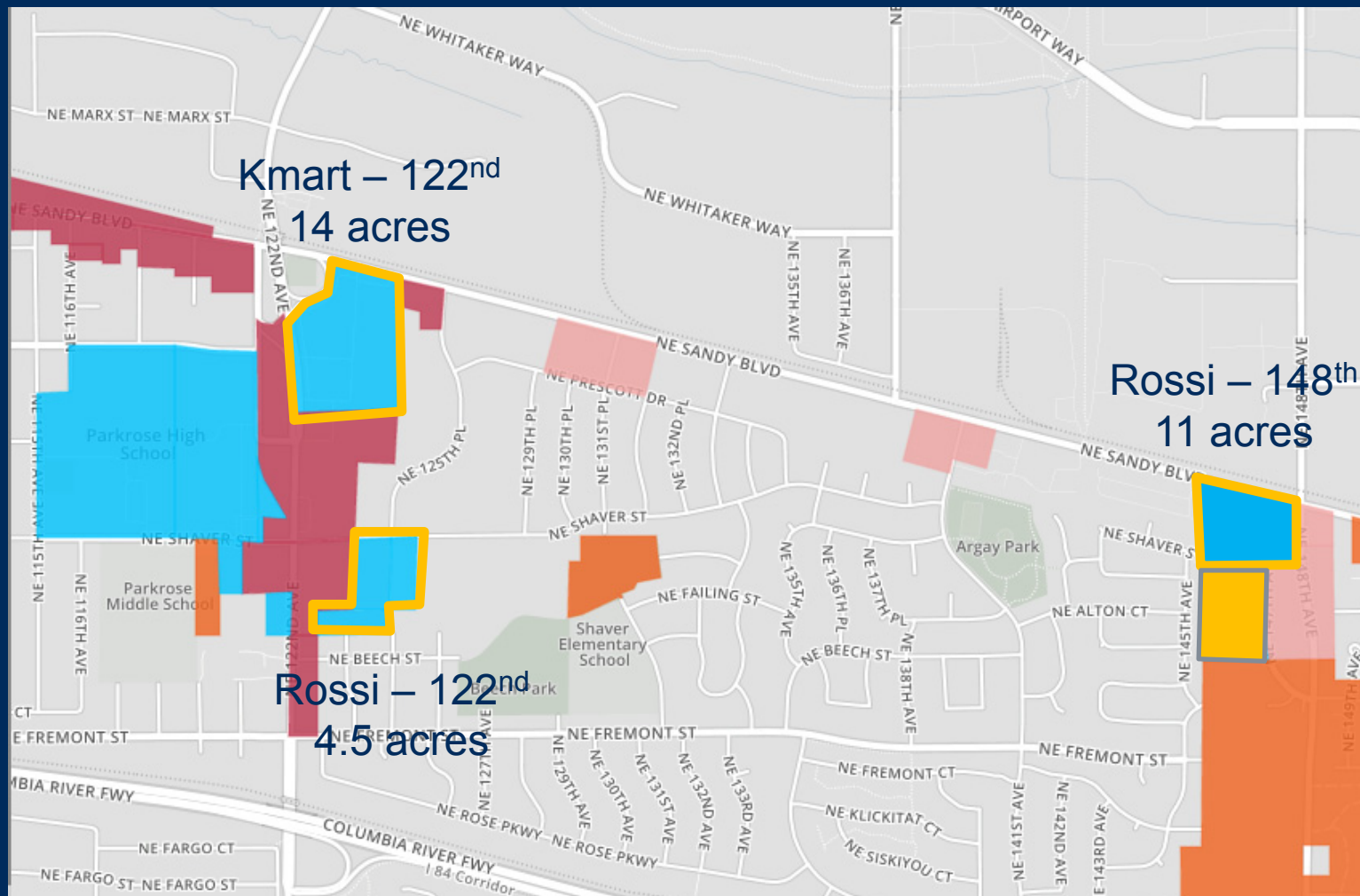
- Create an industrial/commercial brownfield redevelopment program.
- Lobby for State legislation and funding to expand brownfield redevelopment.
- Create incentives for cleanup and redevelopment but not be available to entities responsible for the contamination.
- Obtain Superfund liability relief for purchasers.
- Take a leadership role to promote cleanup of the Portland Harbor Superfund.
- Create a local industrial land bank.



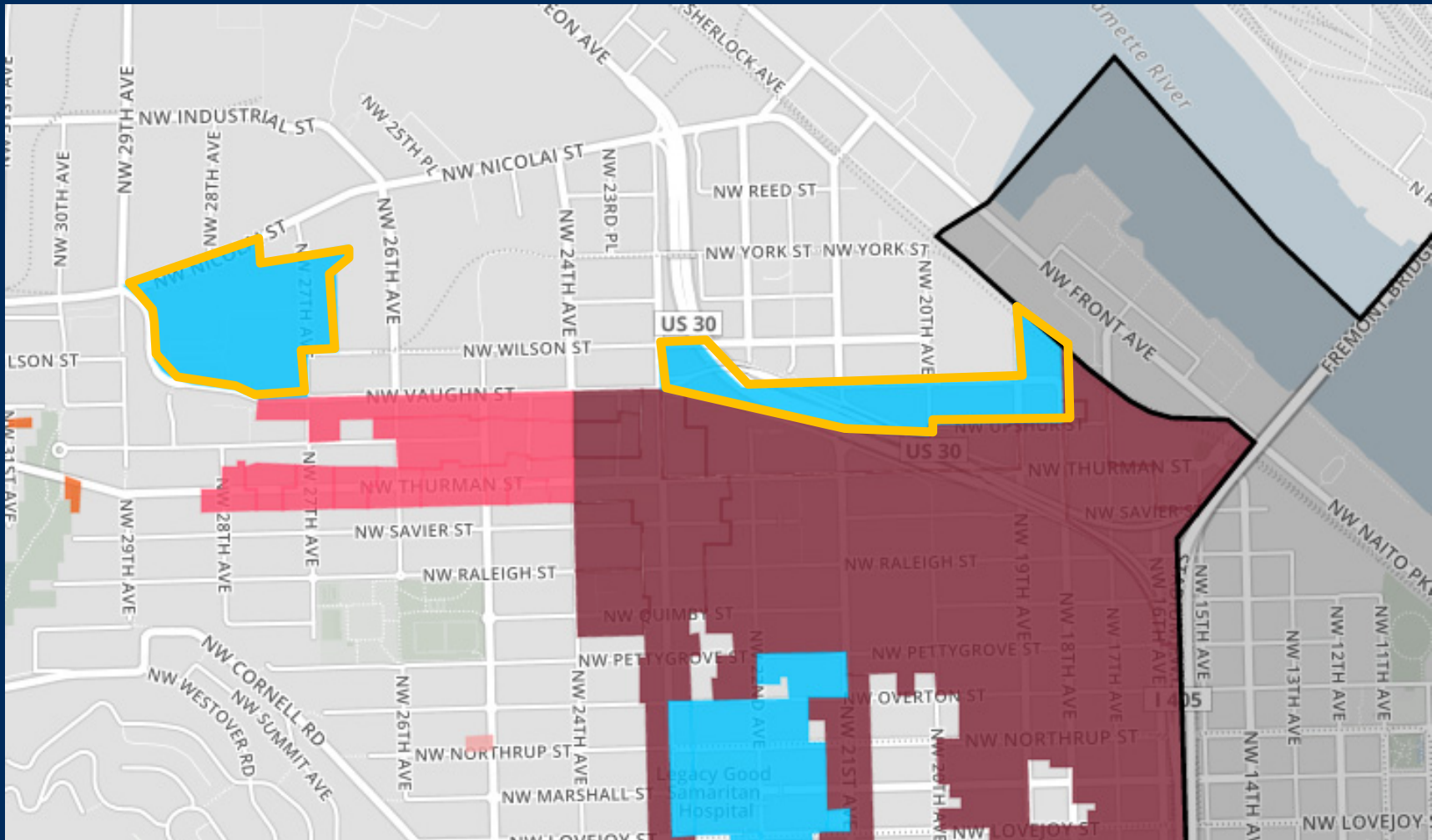
Issue E. Employment Land Map Changes



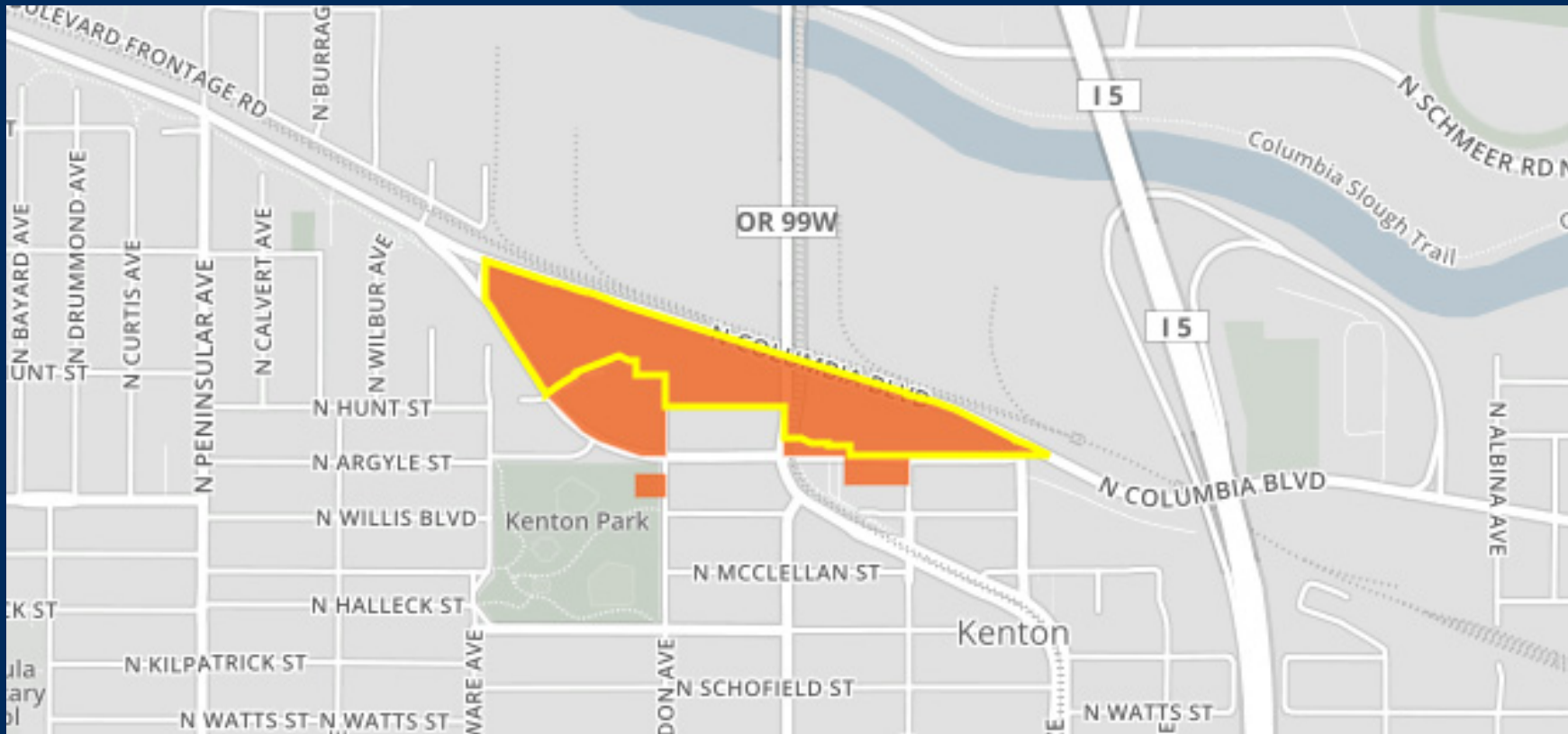
East Portland



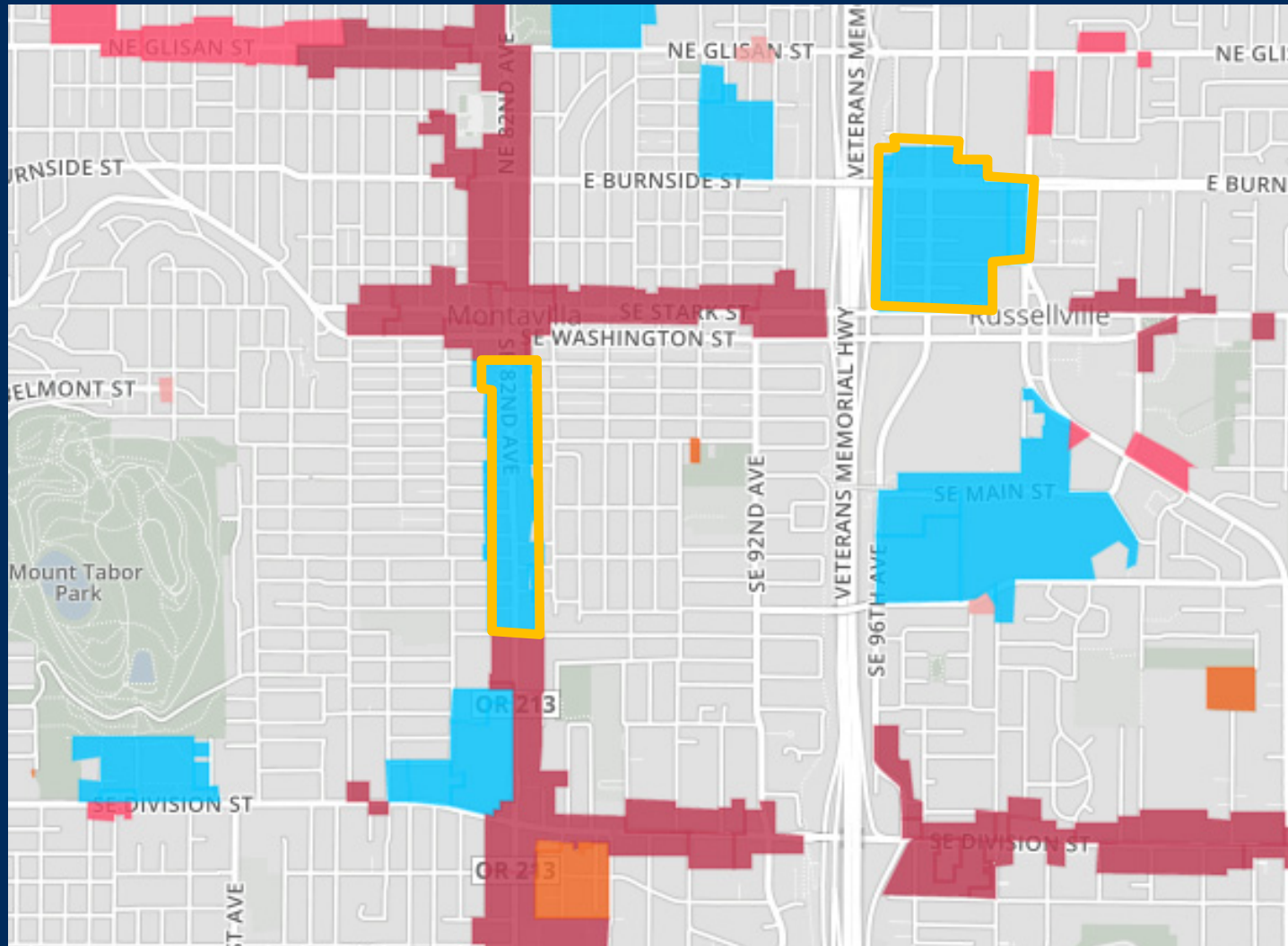
Northwest Industrial District



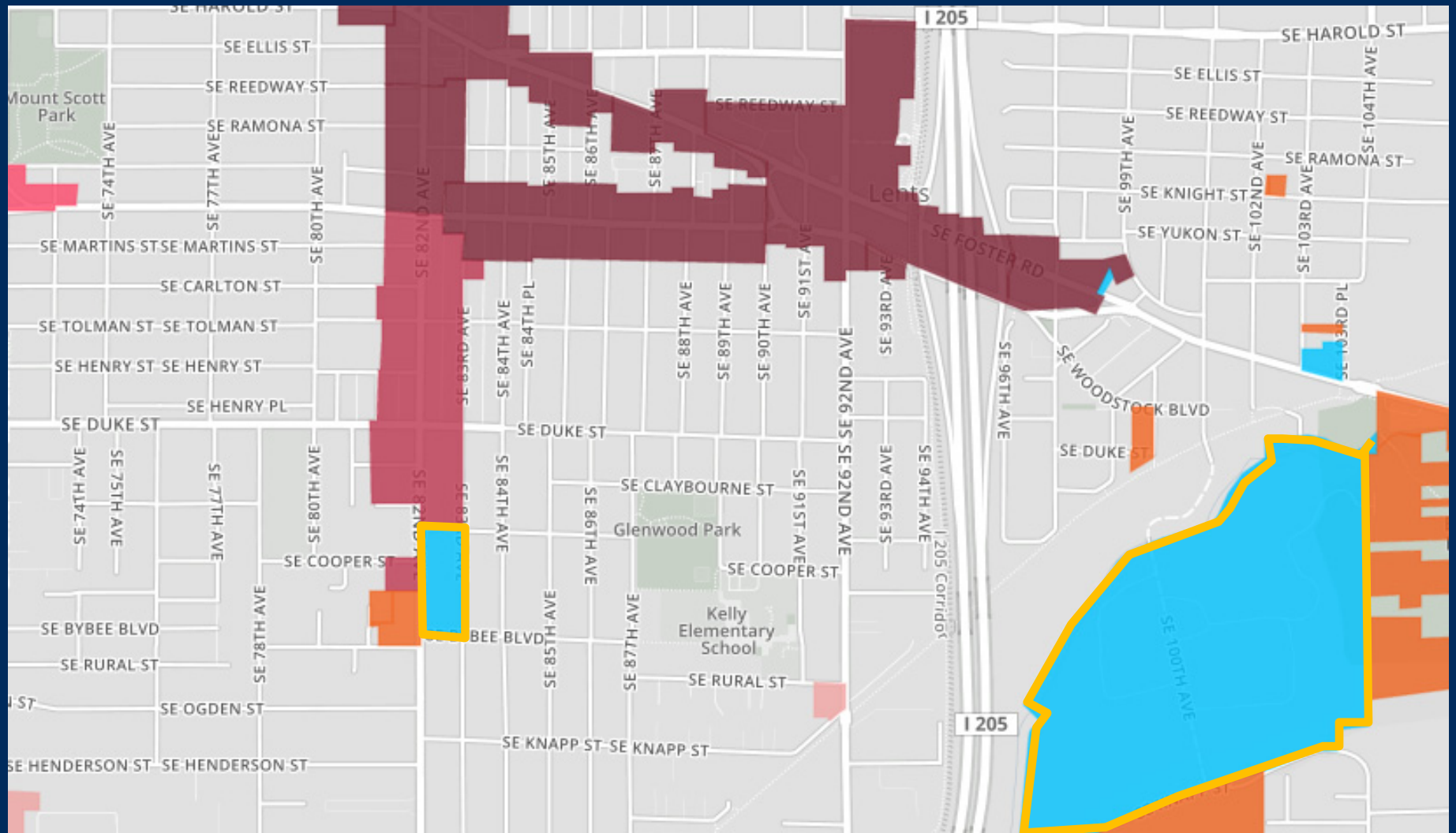
North Portland



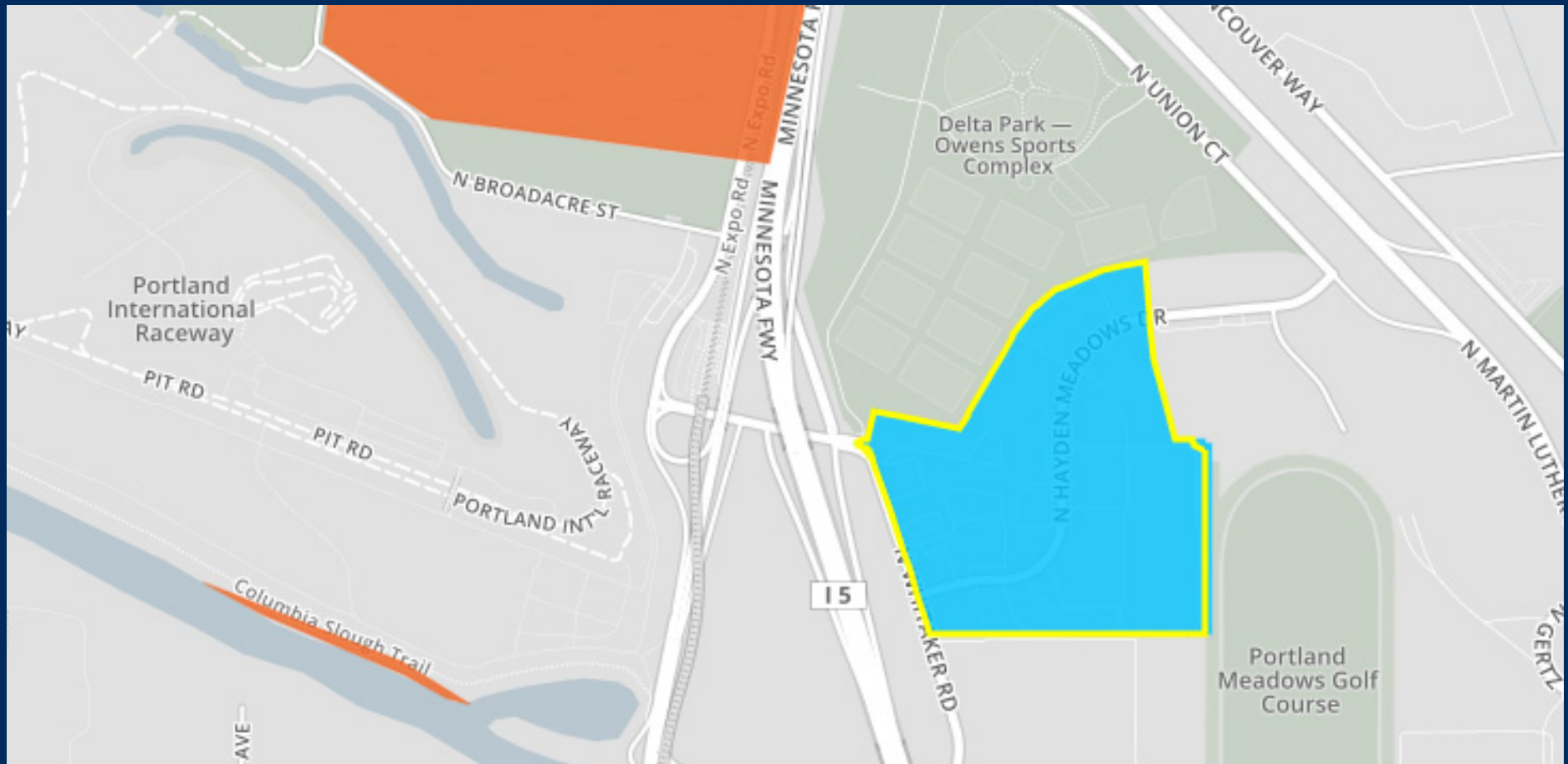
SE 82nd Ave and Gateway



SE 82nd Ave and Freeway Lands



N. Hayden Meadows Drive



Issue F.

Campus Institutions

- Most comments to be addressed in Task 5 zoning project (June)
- Change map designation to Campus Institutions for Marquam Hill, retain EX zoning and plan district
- Add Innovation District policy



Chapters 6 and 7 Policy Changes



Policy 6.17 Regulatory climate

- Improve development review processes and regulations to encourage predictability and support local and equitable employment growth and encourage business retention, including:
 - a. regulatory costs competitiveness
 - b. certainty for development review
 - c. flexible and innovative
 - d. avoid unnecessary delays
 - e. cost effective compliance



Policy 6.17 Regulatory climate

- 6.17.a. Maintain Portland's financial competitiveness in employment land development markets with respect to cumulative regulatory costs.
- 6.17.e. Promote cost effective compliance with federal and state mandates, productive intergovernmental coordination, and ~~avoid~~ efficient, well-coordinated development review and permitting procedures



Policy 6.36 Prime industrial land

Protect the multimodal freight-hub industrial districts at Portland Harbor, Columbia Corridor, and Brooklyn Yard as prime industrial land that is prioritized for long-term retention:

- a. limit quasi-judicial map amendments
- b. limit conversion for non-industrial uses
- c. minimize regulatory impacts
- d. offset capacity reductions



Policy 6.36 Prime industrial land

- **6.36.e.** Limit the use of prime industrial land for siting of parks, schools, large-format places of assembly, and large-format retail sales.
- **6.36.f.** Promote efficient use of freight hub infrastructure and prime industrial land by limiting non-industrial uses that do not need to be located in the prime industrial area.

