

# Portland's Industrial Areas

Potential Land Use, Natural Resource, and Funding Strategies

# Agenda

- EOA Overview (30 mins)
- Industrial Strategies (30 mins)
- Industrial Policy Options (15 mins)
- Scenario Model Explanation and Discussion (45 mins)

# Meeting Purpose:

## Feedback

- What about the methodology needs clarifying?
- What additional information is needed?

## Alternatives

- How do we balance a wide range of objectives?
- What policy options are realistic?
- What are shared interests?

# EOA Timeline

- June 2025 Consolidate Feedback/Draft EOA
  - **Today – Input to inform Discussion Draft**
- July 2025 Publish Discussion Draft
- Aug-Sept 2025 Community Outreach (Online/In-Person)
  - **October – CWG meeting to share what we hear**
- November 2025 Publish Proposed Draft
- Dec 2025-Feb 2026 Planning Commission recommendation
- April-June 2026 City Council adoption

# Coordinated Policy Decisions

State, Metro and Local policy direction to protect natural resources and provide for economic growth

- **Statewide Planning Goals**
  - Goal 5 (Natural Resources)
  - Goal 9 (Economic Development)
- **Metro Urban Growth Management Functional Plan**
  - Title 4 (Industrial Areas)
  - Title 13 (Nature in Neighborhoods)
- **2035 Comprehensive Plan**
  - Chapter 6 (Economic Development)
  - Chapter 7 (Environment and Watershed Health)



*Columbia Slough*

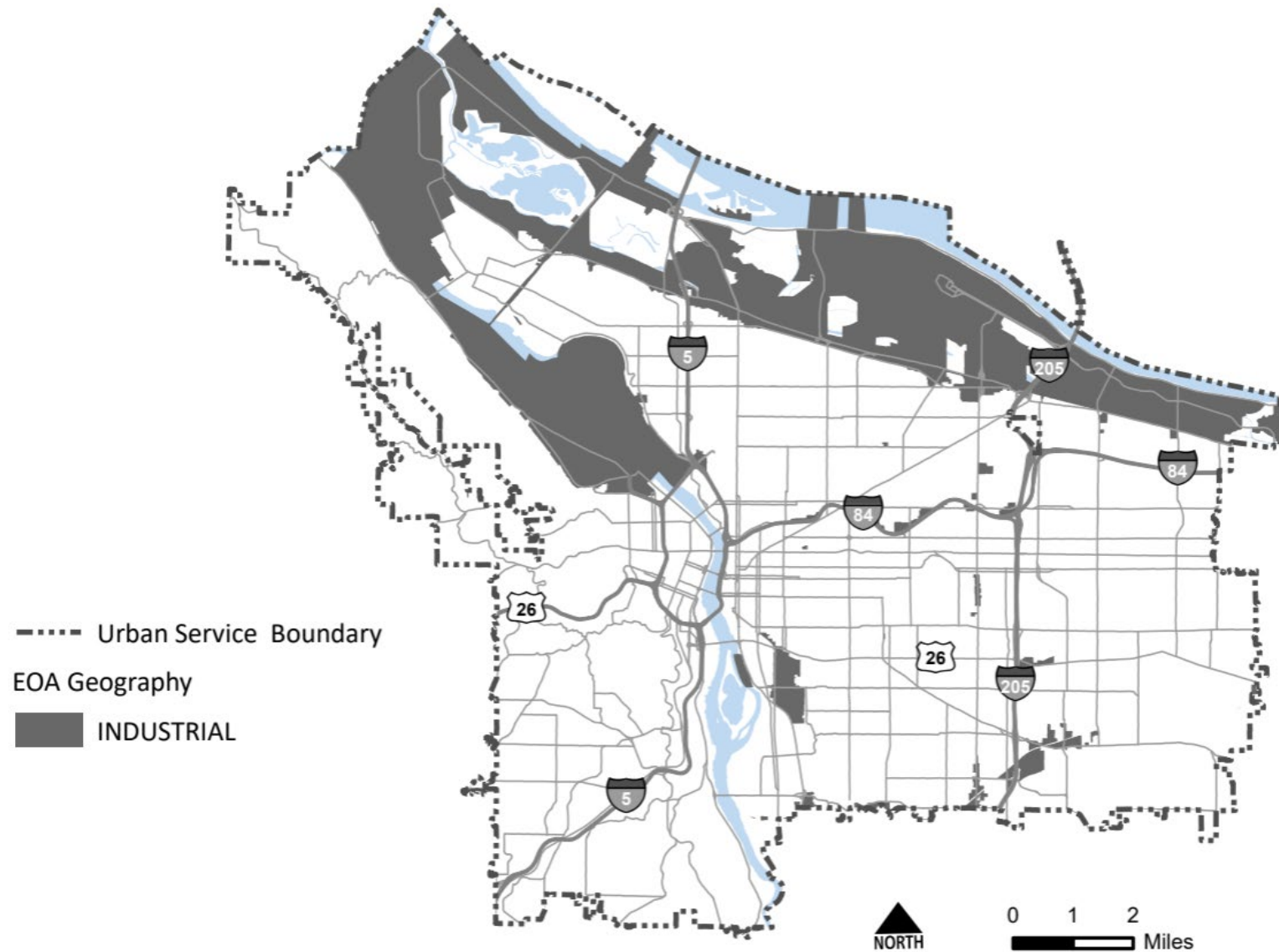
# Starting Place: Shared Goals for Portland's Future

- Accessible, High-Quality Jobs
- Clear, Consistent, and Predictable Regulation
- Protecting Habitat, Climate, and Community Health
- Productive and Ready Employment Lands

# Goal of the EOA is to Answer these Questions

1. How many jobs is Portland expected to add?
2. What kind of land and space will those jobs need?
3. Do we have enough suitable land to meet that need?
  - What other policy objectives impact land availability?

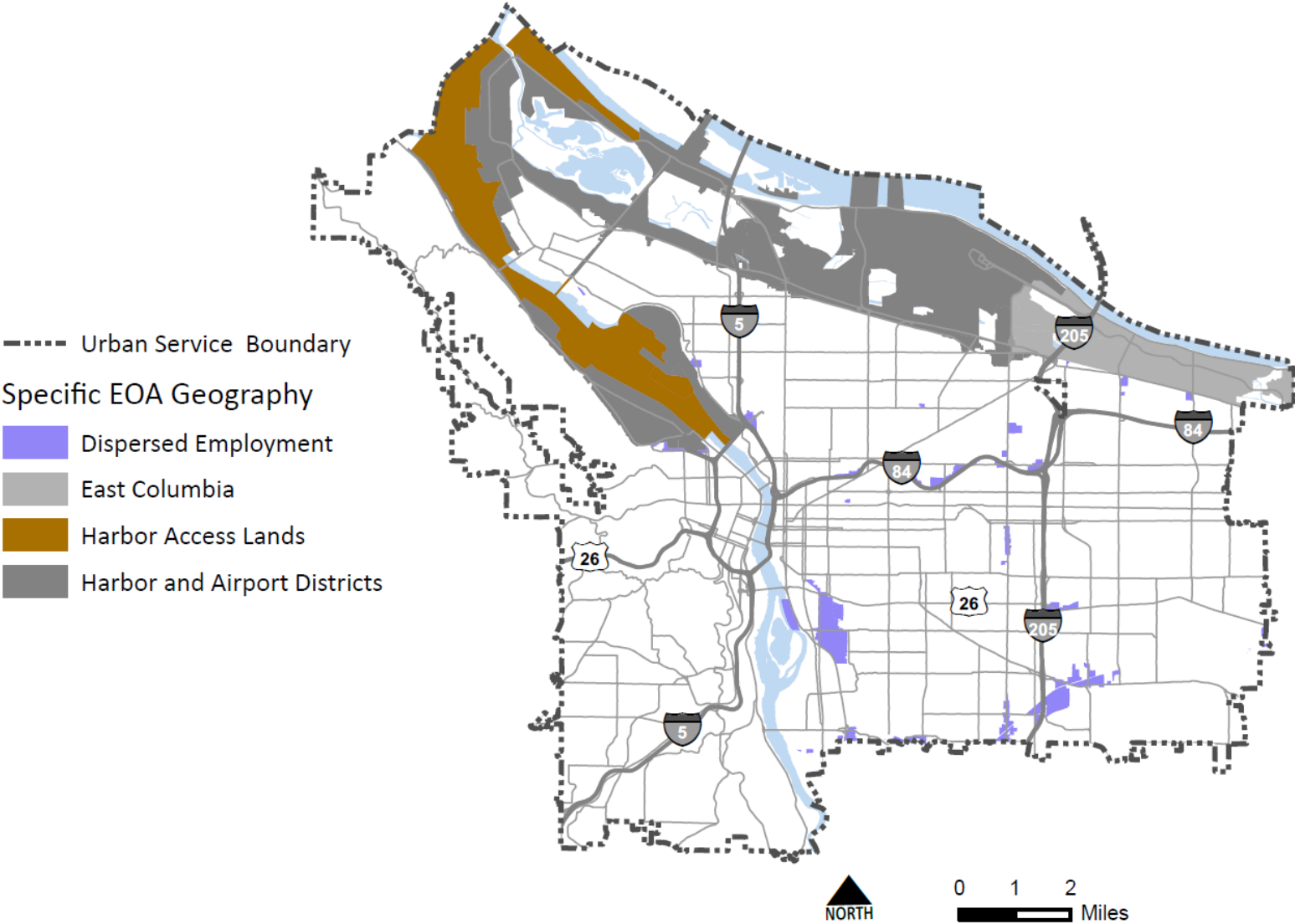
# Portland's Industrial Areas





# Projected New Jobs in Industrial Areas

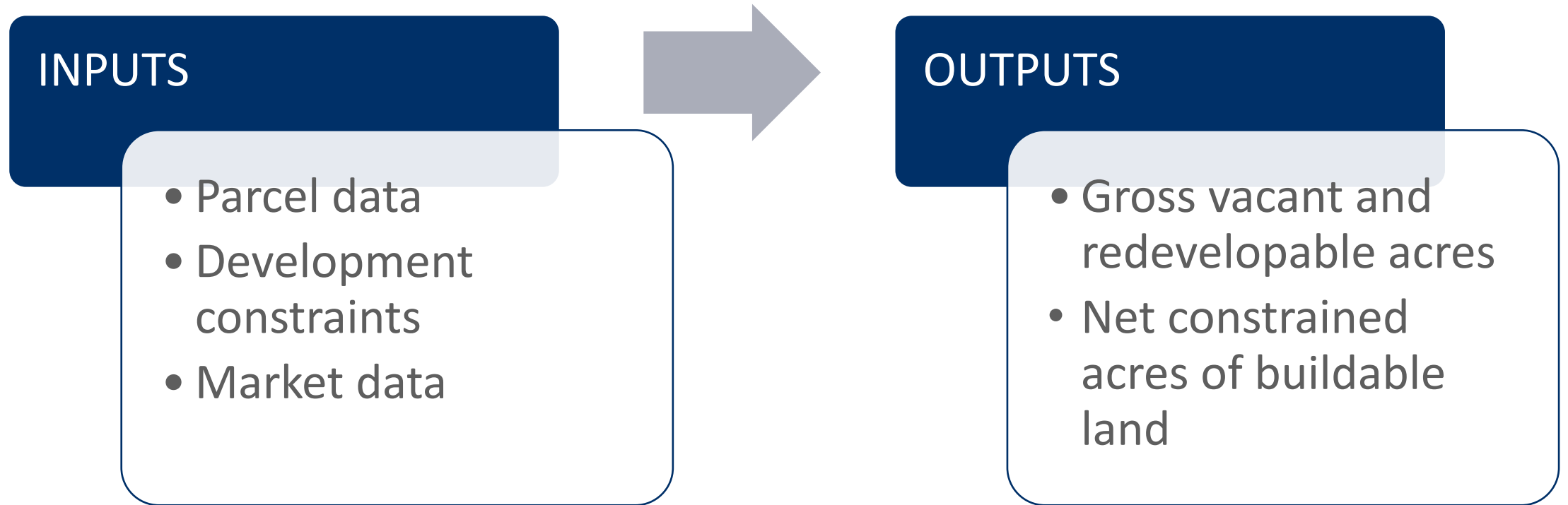
Area	Jobs in 2045
Harbor & Airport Districts	15,200
East Columbia	8,000
Dispersed Employment Areas	4,400
Harbor Access Lands	2,000
Total	29,600



# Land Demand

Area	New Jobs	Jobs per Acre	Total Acres
Harbor & Airport Districts	15,200	24	636
East Columbia	8,000	24	326
Dispersed Employment Areas	4,400	64	68
Harbor Access Lands	2,000	29	70
<b>Total</b>	<b>29,600</b>	<b>30</b>	<b>1,101</b>

# Land Supply: Buildable Land Inventory (BLI) Model



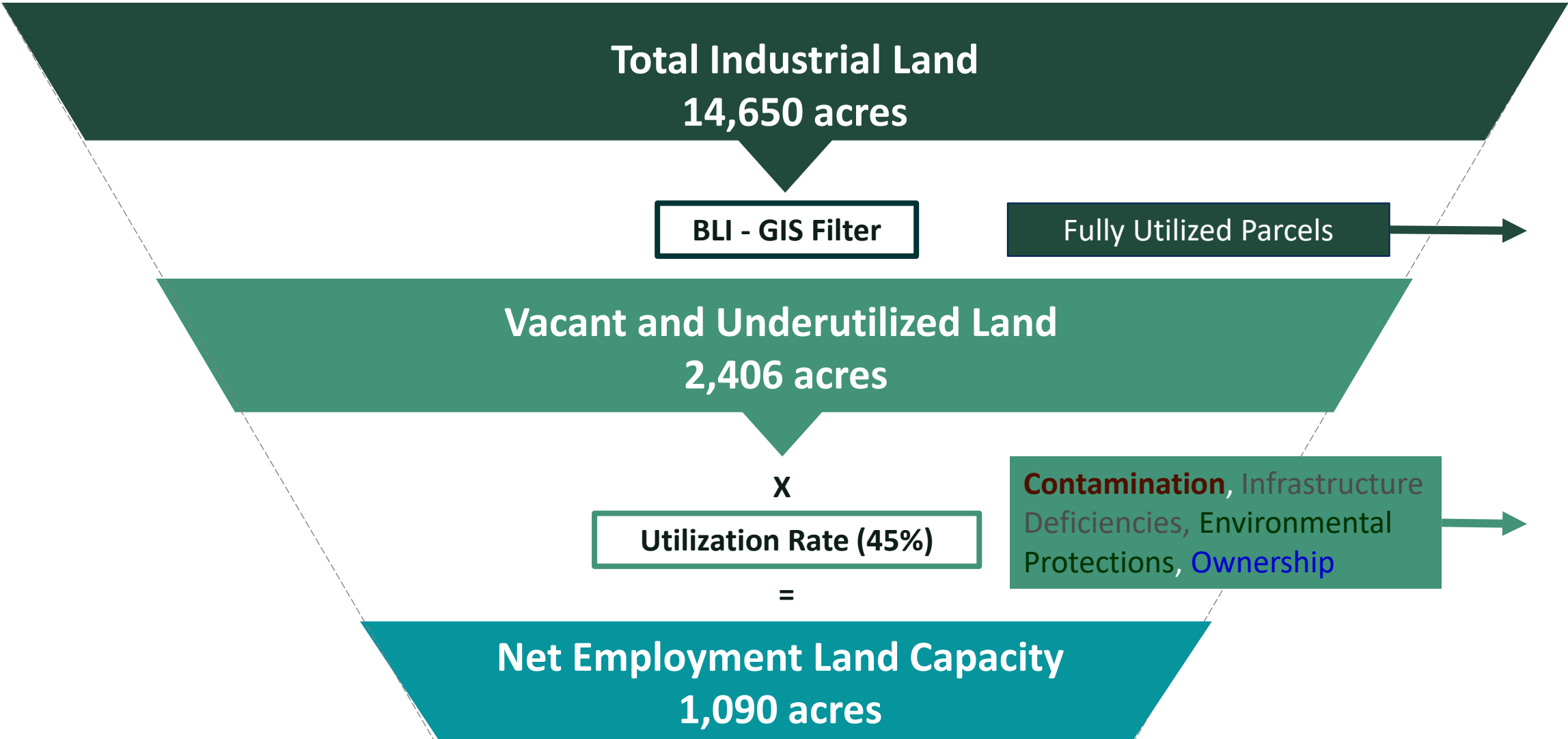
# BLI Constraints on Development

The model discounts capacity impacted by 'constraints':

- Brownfields
- Environmental overlays
- Greenway overlays
- Floodplain/high hazard area
- Steep slopes
- Substandard infrastructure/transportation

# 3. Do we have enough suitable land to meet that need?

## Filtering Industrial Land to Identify Net Capacity



# Discussion



# Scenario Planning

- Compare how different policy choices (high/med/low) affect land capacity.
- Helps to understand scale and impact of policy choices

	Base	Combinations								
Scenario	0	1	2	3	4	5	6	7	8	9
Natural Resources		low	med	med	high	high	high	med	low	med
Investment		low	low	med	high	med	low	med	med	high
Community Impact		low	low	high	high	low	high	low	low	high

# Policy Options



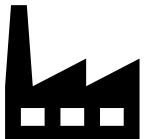
## Investment

Brownfields, Superfund, transportation, utilities



## Natural Resources

North Reach/floodplain, ezones, tree code






## Community Impacts

Proximity to residential areas



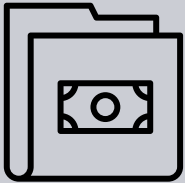

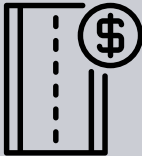
# Investment Strategies

## Process Improvements

	Name	Description	Impact
	<b>Fast-Track Industrial Permitting Program</b>	Allow for concurrent review of demolition, grading, land use, and CLOMR permits; faster EA scheduling.	Speeds up permitting and improves competitiveness for time-sensitive projects.
	<b>Developer-Led Infrastructure Reimbursement</b>	Allow private developers to build needed infrastructure and be reimbursed through a pre-approved process.	Enables improvements that support freight access, unlocking shovel-ready development.
	<b>High-Opportunity Site Support</b>	Maintain a list of priority sites with program support and permitting navigation.	Focuses resources and accelerates readiness for high-opportunity job-creating sites.

# Investment Strategies

## Targeted Incentives

	Name	Description	Impact
	Infrastructure Cost Offset Tools	Offers SDC deferrals, fee waivers, and utility gap funding for sites.	Lowers upfront costs to make industrial sites development-ready.
	Superfund & Brownfield Readiness Fund	Funds cleanup, planning, and incentives like NRD and tax credits.	Enables reuse of contaminated sites for traded-sector employment.
	Freight & Access Priority Projects	Identify freight projects for the financially constrained TSP for funding and construction.	Improves travel-time reliability and goods movement for industrial employers.

# Discussion



# Policy Choices Impacting Constraints



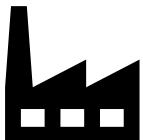
## Investment

Brownfield/superfund, transportation, utilities



## Natural Resources

North Reach/Floodplain, ezones, tree code



## Community Impacts

Varies by size and proximity to residential areas



# Natural Resources Policy Options

- **Ezones:** Adjust Environmental overlay zones (Ezones) in the Columbia Corridor (net expansions)
- **North Reach:** Increase setbacks from the Willamette River (25' to proposed 50') in North Reach, incorporate permanent floodplain requirements and apply River Environmental overlay zone to riparian resources
- **Tree Code:** planting and/or preservation in Heavy Industrial (IH) zone

# Policy Choices Impacting Constraints



## Investment

Brownfield/superfund, transportation, infrastructure



## Natural Resources

North Reach/Floodplain, ezones, tree code

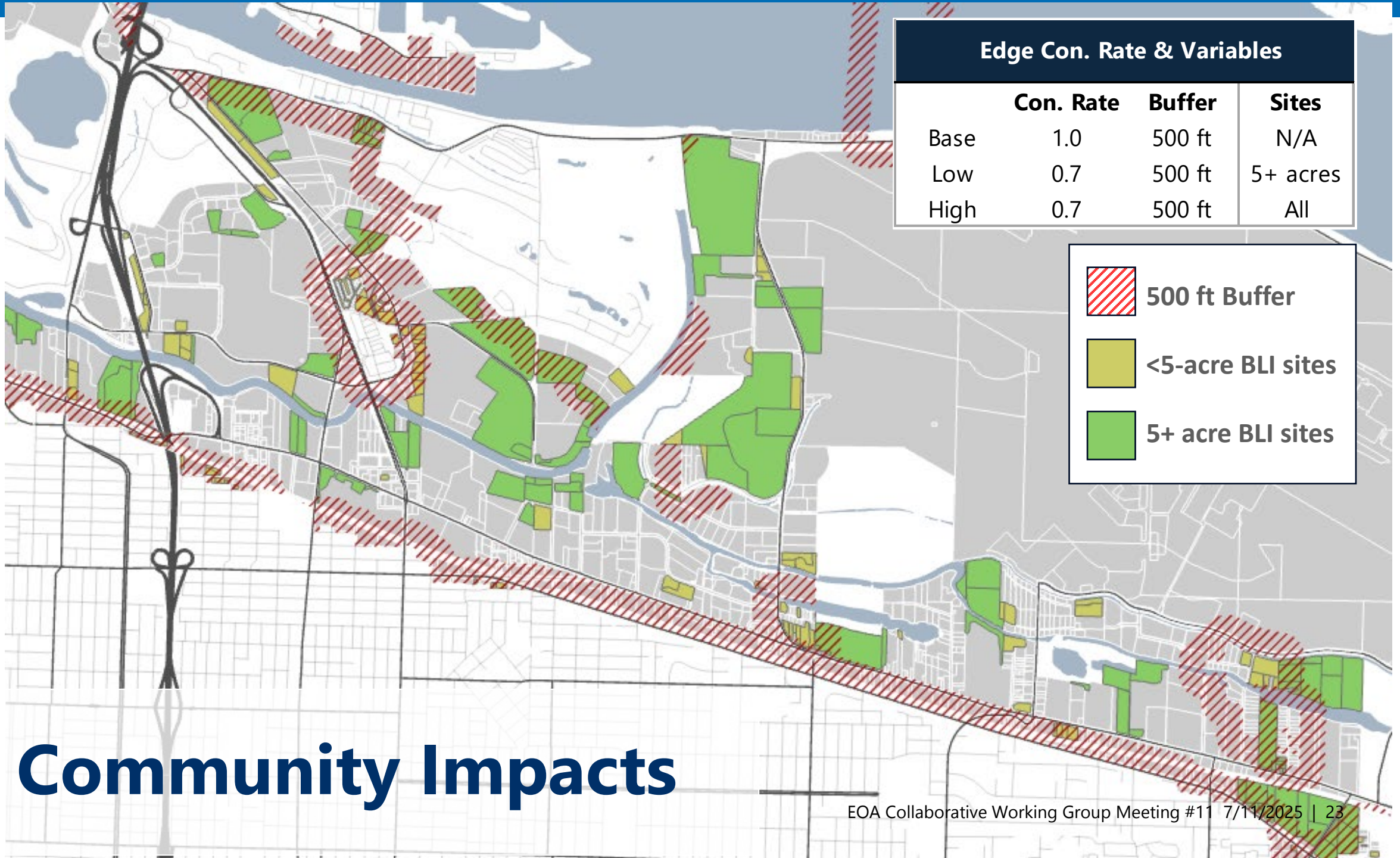


## Community Impacts

Varies by size and proximity to residential areas


































# Community Impacts

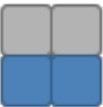
# Scenario Planning

Compare how different policy choices (high/med/low) affect land capacity

	Base	Combinations								
Scenario	0	1	2	3	4	5	6	7	8	9
Natural Resources										
Investment										
Community Impact										
Industrial Capacity	1,106	1,116	1,081	1,018	1,120	1,123	1,094	1,170	1,195	1,230



Low



Med



High

Projected 2045 Employment Demand: 1,101 Acres



# Scenario Planning

Compare how different policy choices (high/med/low) affect land capacity

Passive	
Nat. Res.	Low
Invest.	Low
Comm.	Low
1,116 acres	

Protective	
Nat. Res.	High
Invest.	Low
Comm.	High
1,018 acres	

Growth	
Nat. Res.	Low
Invest.	Med
Comm.	Low
1,230 acres	

Aggressive	
Nat. Res.	High
Invest.	High
Comm.	High
1,094 acres	

# Discussion:

## Trade-offs, Priorities, and Collaboration

- Impact of different policy scenarios on net developable land.
- Emphasis on:
  - Middle Wage Job Opportunities
  - Climate resilience
  - Economic competitiveness
- Which strategies matter most? What is realistic?
- Where can alignment unlock sites?

# Detailed Scenario Results

Description	Base	Combinations								
Scenario	0	1	2	3	4	5	6	7	8	9
Natural Resources Input	Nat. Res	low	med	high	med	med	high	high	med	low
Investment Input	Invest.	low	low	low	med	high	high	med	med	med
Edge Input	Edge	low	low	high	high	high	high	low	low	low

<b>Net Industrial Acres</b>	<b>1,106</b>	<b>1,116</b>	<b>1,081</b>	<b>1,018</b>	<b>1,120</b>	<b>1,123</b>	<b>1,094</b>	<b>1,170</b>	<b>1,195</b>	<b>1,230</b>
Dispersed Employment	114	113	111	97	103	103	98	106	111	112
East Corridor	184	194	181	169	178	178	169	173	182	195
Harbor Access Lands	69	70	70	70	115	115	115	150	150	150
Harbor & Airport Dist.	740	739	719	681	725	727	712	741	753	773
<b>Difference from Base</b>		1%	-2%	-8%	1%	1%	-1%	6%	8%	11%



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