

Citywide Industrial Land Inventory and Assessment



Inventory Report: Final Draft, July 2003

Prepared by the City of
Portland Bureau of Planning

In cooperation with the Portland
Development Commission



City of Portland
Bureau of Planning

PDC
PORTLAND
DEVELOPMENT
COMMISSION

Acknowledgements

Mayor Vera Katz, Commissioner-in-Charge

Portland Bureau of Planning

Gil Kelley, Planning Director

Joe Zehnder, Principal Planner

Project Staff

Steve Kountz, Senior Planner

Debbie Bischoff, Senior Planner

Gary Odenthal, Technical Services Manager

Bronwyn Buckle, Community Service Aide

Portland Development Commission

Don Mazziotti, Executive Director

Marty Harris, Economic Development Director

Project Staff

Elissa Gertler, Economic Development Manager

Robert Smith, GIS Assistant

Table of Contents

Introduction.....	iii
1. Methodology.....	1
A. Inventory Area and Districts.....	1
B. Determination of Sites.....	1
C. Database Fields and Data Sources.....	2
D. Limitations and Next Steps.....	6
2. Citywide Industrial Lands Summary.....	9
A. Land and Employment by District.....	9
B. Industries by Employment.....	10
C. Land Supply Characteristics.....	11
D. Site Advantages.....	12
E. Site Constraints.....	15
3. Industrial District Summaries.....	16
A. Airport.....	16
Industry Mix.....	16
Land Supply Characteristics.....	17
Site Advantages.....	18
Development Constraints.....	20
B. Banfield.....	24
Industry Mix.....	24
Land Supply Characteristics.....	25
Site Advantages.....	26
Development Constraints.....	26
C. Columbia Corridor East.....	30
Industry Mix.....	30
Land Supply Characteristics.....	31
Site Advantages.....	32
Development Constraints.....	33
D. Columbia Corridor West.....	36
Industry Mix.....	36
Land Supply Characteristics.....	37
Site Advantages.....	38
Development Constraints.....	39
E. Inner Eastside.....	42
Industry Mix.....	42
Land Supply Characteristics.....	43
Site Advantages.....	44
Development Constraints.....	45
F. Northwest Industrial.....	48
Industry Mix.....	48
Land Supply Characteristics.....	49
Site Advantages.....	50
Development Constraints.....	51
G. Outer Southeast.....	54
Industry Mix.....	54
Land Supply Characteristics.....	55
Site Advantages.....	56
Development Constraints.....	57
H. Rivergate.....	60
Industry Mix.....	60
Land Supply Characteristics.....	61

Site Advantages.....	63
Development Constraints.....	64
I. Swan Island / Lower Albina.....	70
Industry Mix.....	70
Land Supply Characteristics.....	71
Site Advantages.....	72
Development Constraints.....	73
4. Industrial and Employment Zones Performance.....	76
Land and Employment by Zone.....	76
Land Use Characteristics.....	77
Site Constraints.....	79

List of Maps

Citywide Industrial Land Inventory.....	v
Airport Industrial District.....	21
Airport Vacancy and Site Constraints.....	22
Banfield Industrial District.....	27
Banfield Vacancy and Site Constraints.....	28
Columbia Corridor East Industrial District.....	33
Columbia Corridor East Vacancy and Site Constraints.....	34
Columbia Corridor West Industrial District.....	39
Columbia Corridor West Vacancy and Site Constraints.....	40
Inner Eastside Industrial District.....	45
Inner Eastside Vacancy and Site Constraints.....	46
Northwest Industrial District.....	51
Northwest Vacancy and Site Constraints.....	52
Outer Southeast Industrial District.....	57
Outer Southeast Vacancy and Site Constraints.....	58
Rivergate Industrial District.....	65
Rivergate Vacancy and Site Constraints.....	66
Swan Island / Lower Albina Industrial District.....	71
Swan Island / Lower Albina Vacancy and Site Constraints.....	72

Introduction

The Citywide Industrial Land Inventory is a site-by-site description of Portland's industrial land supply. The Portland Bureau of Planning conducted the inventory in partnership with the Portland Development Commission. This project assembles the most recent information available in Spring 2003 from a variety of sources on the following topics:

- industry mix, such as industry classification of employers and number of employees;
- land supply characteristics, such as site size, vacancy, and property values;
- site advantages, such as transportation access by various modes, access to public redevelopment resources, and planned public improvements nearby; and
- site constraints, such as environmental resources, site contamination, and proximity to housing.

The inventory is part of a larger project, the *Citywide Industrial Land Inventory and Assessment*, that includes an analysis of demand for land in industrial districts and associated urban renewal areas and 17 cases studies assessing the redevelopment potential of specific sites in these areas. The project is an initial step in the implementation of Portland's *Strategy for Economic Vitality* (2002) and its priority recommendation to preserve, protect, and redevelop industrial sites. The inventory also will be used and regularly updated as a marketing database for the City's vacant industrial land.

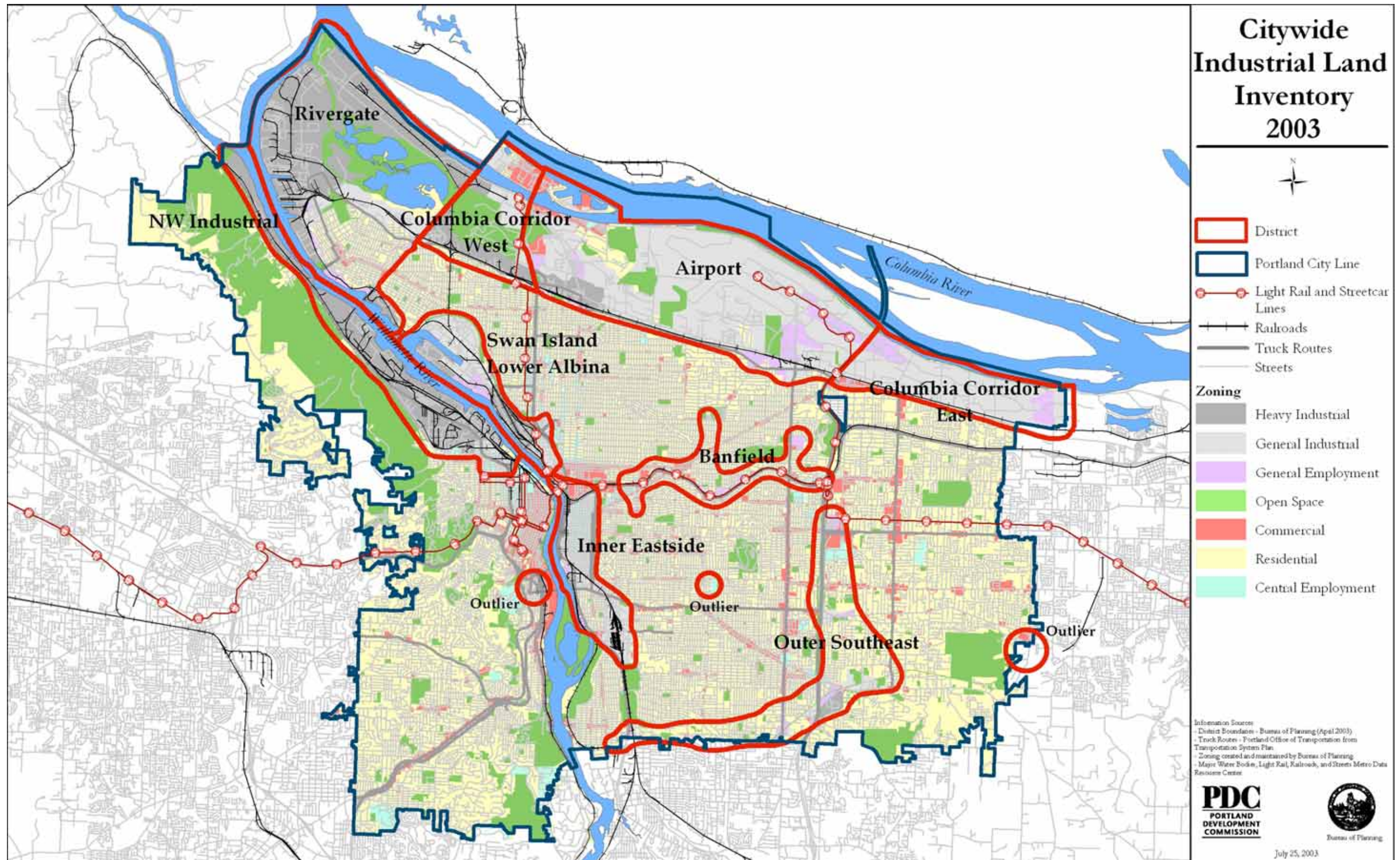
A secondary purpose of the inventory is to provide an up-to-date understanding of the characteristics, function and performance of the city's industrial areas. A citywide industrial lands inventory has not been done since the industrial sanctuary planning efforts in the 1980s. Information collected in the inventory is relevant to a range of upcoming policy decisions: designation of "regionally significant industrial lands" to comply with Metro's Title 4; refinement and implementation of industrial development strategies; potential changes to the industrial base zones to better accommodate evolving industrial uses; and future rezoning requests involving industrial land.

Inventory Area

The lands examined in the inventory were selected to reflect properties generally committed to future industrial and industrially related uses, what essentially makes up Portland's industrial land supply. The inventory area consists of all taxlots with General Industrial (IG), Heavy Industrial (IH), or General Employment (EG) zoning in the *Portland Zoning Code* and any additional taxlots with the corresponding land use designations in Portland's *Comprehensive Plan*. The inventory area is shown in the Citywide Industrial Land Inventory map below, along with the industrial district boundaries used to aggregate and present inventory results.

Report Organization

The products of the inventory are a citywide industrial sites database and this summary report of inventory findings. Chapter 1 presents the inventory methodology, while describing its limitations and suggesting further research for more comprehensive and accurate results. Chapter 2 is an overview of Portland's industrial lands supply, aggregated information on the entire inventory area. Chapter 3 characterizes each of the nine industrial districts identified in the inventory. Database results are presented as summary tables, maps, and brief descriptions. Chapter 4 is a comparative summary of how each of the industrial and employment zones that make up the city's industrial land supply are performing.



1. Methodology

A. Inventory Area and Districts

The inventory area consists of all taxlots with General Industrial (IG), Heavy Industrial (IH), or General Employment (EG) zoning in the *Portland Zoning Code* and any additional taxlots with corresponding Industrial Sanctuary or Mixed Employment designations in Portland's *Comprehensive Plan*. The latter are expected to convert to industrial or employment zones over the long term. General Employment zones are included because they emphasize industrial and industrially related uses, while allowing a somewhat broader mix of land uses.

Central Employment zones were not included, because locations where that zone is applied, such as the Pearl District, have generally developed into a broader mix of uses, more characteristic of an urban center than an industrial area. There are also existing industrial businesses located outside of the inventory area and other zones that allow future industrial development, but the *Portland Zoning Code* and the *Comprehensive Plan* provide less commitment to accommodation of future industrial uses in those areas.

The inventory area was divided into nine districts, so that inventory data can be aggregated to characterize and distinguish the different industrial areas in Portland. District boundaries are shown in the Citywide Industrial Land Inventory map above. Most of the districts represent large, contiguous areas: Airport; Columbia Corridor East; Columbia Corridor West; Inner Eastside (Central Eastside and Brooklyn); Northwest Industrial (Guild's Lake and Linnton); Rivergate (including St. Johns); and Swan Island/Lower Albina. Two other districts represent groupings of noncontiguous areas: Banfield and Outer Southeast. Banfield includes the industrial areas concentrated along the Banfield Freeway east of the I-205 Freeway. Outer Southeast is the group of industrial areas along the southern city border, in Lents, and along the I-205 Freeway. A few "outlier" properties, which do not fit within the boundaries of these districts, are also included in the inventory. Outliers comprise only 17 acres of land, 0.1 percent of the inventory area.

How the Columbia Corridor, Portland's largest contiguous industrial area, was divided into districts deserves further explanation. Columbia Corridor Association and Port of Portland staff were consulted about how best to divide this area, which represents several overlapping jurisdictions. Columbia Corridor is too expansive to characterize as a single district, but dividing it into eight to ten districts comparable in size to the Swan Island or Northwest Industrial areas would complicate the presentation of inventory data and emphasize distinctions of diminishing usefulness. Rivergate was acknowledged as a distinct district, developed by the Port of Portland and largely characterized by its large marine terminals and rail facilities. Rivergate's boundary extends east to the Burlington Northern Santa Fe railroad cut and, for the purpose of this inventory, was drawn to include the smaller St. Johns industrial areas to the south. Largely for simplicity, I-5 and I-205 were used to divide the remainder of the Columbia Corridor into three districts. The resulting Airport district between I-5 and I-205 is the largest district in the inventory.

B. Determination of Sites

The basic geographical units of the inventory are "sites," which are linked to descriptive data about the underlying land, such as how many people are employed there or how much of the site is in the 100-year floodplain. Generally, the term "site" is used in this study to mean contiguous taxlots under single ownership—what are essentially development sites.

The Metro and City of Portland geographical information systems utilize taxlots, defined by county assessment and taxation (A&T) records, to map properties. The *Regional Industrial Lands Study* (Otak, Inc., 1999) and Metro's vacant industrial lands inventory use those taxlots as the basic unit for describing and mapping properties. Two shortcomings of using taxlots to represent industrial properties are apparent. First, properties under single ownership may include multiple taxlots that have no relation to the property's existing development pattern or to how the owner might reconfigure the property in the future. The inventory area consists of 4,022 sites and 6,736 taxlots. Second, using taxlots may give a false impression of the availability of large sites (e.g., over 50 acres), which has been identified as an issue in Portland and the region. Since the purpose of this study relates to

understanding the developability of properties, contiguous property ownerships are used instead of taxlots to represent properties.

The following steps were used to define sites in the inventory database:

- Taxlots were used as a starting point from the City’s CGIS (Corporate Geographical Information System) SDE database, which includes ownership information from February 2003.
- Taxlots were included in the inventory only if they intersected industrial (IG1, IG2, or IH) zones, employment (EG1 and EG2) zones, or the corresponding industrial (IS) or mixed employment (ME) comprehensive plan designations. However, these taxlots in some cases also encompassed zones other than those of primary interest.
- A modified owner field was created, which was a simplified version of the A&T owner field to standardize owner names. Adjustments were made for small inconsistencies in the data entry of these names, such as abbreviations and joint names in reverse order.
- The taxlots were dissolved on this modified owner name to create sites defined by adjacency and common ownership. Rights-of-way (either street or railroad) separate distinct sites, so that a site may be smaller than a city block but not larger.
- Publicly owned sites less than 1,000 square feet were deleted, in order to remove taxlots that function as fragments of right-of-way. Aerial photos were reviewed on privately owned sites generally less than 1,000 square feet, and they were merged with the adjacent larger site if it appeared to function as a single site.

Other review steps, described below under data limitations, were initiated and then postponed to a second phase of the project or future research. These additional steps did not result in actions to further define sites or modify the database. For example, due to the apparent extent and complexity of the multiple-employer configurations on single sites and multiple-site configurations of some owners, the site definition was not modified based on employer data.

C. Database Fields and Data Sources

The database was developed using a variety of source data. The majority of the data was compiled in the City of Portland Bureau of Planning Geographic Information System (GIS) in April 2003. Three main tables were developed, linked by site identification numbers: the assessor table, the site table, and the employment table. Calculations and data sources of the fields in each table are described below.

Land Supply Characteristics

Assessed land, improvement, and total property values	Assessed values are the sum of all taxlot values per site, derived from Multnomah County Assessment & Taxation data, February 2003.
Census Tract	2000 Census Tracts are identified for each site, derived from Metro RLISLite data. Each site’s census tract was determined by the location of the GIS-determined centroid of the site.
<i>Comprehensive Plan</i> designations	The one or more <i>Comprehensive Plan</i> map designations applied to each site are identified from Bureau of Planning maps, April 2003. Sites are also identified where the base zone on some portion of the site is inconsistent with the <i>Comprehensive Plan</i> designation.
Historic and conservation districts	A historic or conservation district, if any, applied to the site is identified from Bureau of Planning zoning maps digitized by Roy F. Weston, Inc. and updated by Bureau of Planning through February 2003. Data is registered to taxlots.

Inventory districts	Industrial district boundaries were developed by Bureau of Planning and Portland Development Commission for this inventory, March 2003.
Plan districts	A <i>Portland Zoning Code</i> plan district, if any, applied to the site is identified from Bureau of Planning maps, April 2003.
Property description (Multnomah County only)	Descriptions are identified from the Multnomah County Assessor taxcode. A look-up table was provided by Portland Corporate GIS (CGIS).
Sites	Bureau of Planning created the sites layer by dissolving taxlots on modified owner names. Taxlot data is from CGIS SDE data, February 2003. A&T data is from Multnomah County, February 2003. Bureau of Planning cleaned up the owner name field for consistency.
Site area	The square footage and acreage of sites were calculated by Bureau of Planning GIS.
Taxlots	All Multnomah County taxlot data is from county Assessment & Taxation, February 2003. Clackamas County taxlot data is from RLISLite shapefile, February 2003. Sites consist of one or more taxlots.
Vacant lands, 2001	The vacant (unimproved) proportion of sites is derived from Metro 2001 Vacant Lands Inventory data developed from aerial photography.
Vacant, buildable lands, Tiers A-D, 2000	<p>The vacant (unimproved) and buildable proportion of sites, defined by Metro, are categorized by tiers of development constraints. Vacant, buildable land consists of vacant land developed from July 2000 aerial photography, deducting Title 3 lands (wetland and surrounding 50-foot buffers, 100-year floodplain, 1996 flood inundation area, and riparian buffers). Otak developed the Tier A-D classifications in the <i>Regional Industrial Lands Study</i>, December 1999.</p> <ul style="list-style-type: none"> ▪ Tier A is land with no identified constraints in 1-acre or larger taxlots. ▪ Tier B land is constrained by "landbanked" corporate ownership, lease only, access, or unstable soil limitations, in 2-acre or larger taxlots. Bureau of Planning further identified the Tier B sites that are occupied, based on ES202 employment data, as an indication of partially vacant sites with landbanked acreage. ▪ Tier C is in two categories: infill taxlots less than 1 acre in size and overvalued land exceeding \$5.50 per square foot. ▪ Tier D is redevelopable land with floor area ratio of less than 10 percent and constrained by buildings, brownfields, or existing uses.
Zoning	The one or more base zones (up to four) and any overlay zones applied to the site are derived from City of Portland official zoning maps, April 2003. Bureau of Planning calculated the proportion of sites in each base zone.

Employment and Industries

Employment and industry data are provided from two sources. Data used for maps and for identifying largest employers are from Inside Prospects, a private data source. All other employment and industry data used in the inventory are from ES202 data provided by the Oregon Employment Department, 2000. ES202 data is confidential

and aggregated for planning purposes so not to reveal information on individual employers, and it is not to be distributed. ES202 data consists of “covered employment,” which is estimated from unemployment insurance tax reports submitted quarterly by employers. Only employers required to report to the state for unemployment insurance or workers’ compensation purposes are included, so the ES202 data does not necessarily represent all employment on any given site. Data was originally geo-coded by Metro using the business site address and the street centerline shapefile. Data points were moved onto taxlots by Bureau of Planning and Portland Development Commission to match A&T site address when possible. Additional modification of locations was done for employers who clearly matched the taxlot owner name.

Employment	The number of employees per district or other aggregated area represent covered employment reported by firms for a particular address, derived from Oregon Employment Department ES202 data, 2000.
Firms	The number of firms per district or other aggregated area represent reporting units identified with a particular address, derived from Oregon Employment Department ES202 data, 2000.
Industry	Industry segments are based on “standard industrial classification” (SIC) codes applied by the Oregon Employment Department to firms submitting unemployment insurance tax reports. The employment table shown in Chapter 2 correlates industry segments with two-digit SIC codes.

Site Advantages

All distances, unless otherwise noted, are developed “as the crow flies” from the GIS-determined centroid of the site to the nearest 100 feet.

Capital Improvements Plan (CIP) projects	Capital projects are identified from the City of Portland CIP Database, April 2003, maintained by Portland Corporate GIS. The Bureau of Planning identified projects expected to expand the development capacity of specific industrial districts.
Enterprise zone	Sites are identified if at least partially included within a federally designated enterprise zone, derived from Portland Development Commission data, April 2003.
New markets tax credits	Sites are identified if at least partially included within a 2000 census tract where federal “new markets” tax credits are authorized. Inclusion in a census tract is based on the GIS-determined centroid of each site, derived from Metro RLISLite, 2001.
Urban renewal area	The proportion of sites at least partially in an urban renewal area is derived from Portland Development Commission data, March 2003.
Transportation access	Distances are calculated from transportation facilities to the GIS-determined centroid of each site, measured in feet to the nearest 100-foot segment in most cases.
<ul style="list-style-type: none"> • Truck Route 	Distance is measured to the nearest Regional Truck Street or Major Truck Street, as mapped by the Portland Office of Transportation, <i>Portland Transportation System Plan</i> , effective December 2002. Routes were developed using citywide street centerlines in approximate center of rights-of-way.

<ul style="list-style-type: none"> Airport 	Distance is measured to a point representing the center of the airport U.S. Post Office.
<ul style="list-style-type: none"> Freeway 	Distance is measured to the nearest freeway on or off ramp. Ramps are from citywide street centerline data maintained by Portland Office of Transportation, February 2003.
<ul style="list-style-type: none"> Bus stop, route, and frequency 	Distance is measured to nearest bus stop, using Metro RLISLite data, February 2003. The original source is Tri-Met transit data, January 2002. Data is derived quarterly from route systems maintained by Tri-Met on top of Metro's street network coverage. Bus routes listed include all that stop at the nearest bus stop. Peak route table frequency provided by Metro from Tri-Met data, May 2003.
<ul style="list-style-type: none"> Railroad 	Distance is measured in 50-foot intervals to the nearest heavy rail line (main, branch, and spur tracks) from Metro RLISLite data, February 2003. Railroad line on a site has a distance of 0. Railroad line within 50' of the site boundary has a distance of 50. Sites with adjacent access to railroads are identified if a railroad line is within 50 feet of the site boundary.
<ul style="list-style-type: none"> Harbor 	Sites with adjacent access to Portland Harbor are identified if located between the river and nearest street or railroad right-of-way. Portland Harbor is defined to extend down river from the Steel Bridge to the Willamette River mouth and up river on the Columbia to the Bonneville Power Administration (BPA) right-of-way.

Site Constraints

100-year floodplain	The proportion of sites within the 100-year floodplain are derived from Federal Emergency Management Association (FEMA) maps. Data in Johnson Creek is exact from FEMA data, while the remainder of the City is from a U.S. Army Corps of Engineers representation of FEMA maps and modified for better relative positional accuracy by Bureau of Planning, February 2003.
1996 flood inundation area	The proportion of sites within 1996 flood inundation area is derived from U.S. Army Corps of Engineers data digitized from aerial photos taken during the February 1996 flood. Data is not registered to taxlot base maps.
10 percent or greater slope	The proportion of sites with slope of 1(vertical) to 10(horizontal) or steeper was developed by Bureau of Planning in November 2002. Elevation information is from Metro 2001 digital terrain model (DTM). Slopes were mathematically derived from the DTM using ERDAS Imagine and ArcGIS software. The raster output was converted to vector data. This data is not registered to taxlots.
Composite environmental constraints	The combined proportion of sites where one or more of the following constraints apply: "p" or "n" overlay zones, 100-year floodplain, wetland, slopes of 10 percent or more, or 1996 flood inundation area.
Metro Goal 5 land	The proportion of sites identified as significant habitat or riparian area was derived from Metro inventories developed to comply with Statewide Planning Goal 5, May 2002. Goal 5 lands include riparian resource significance rankings and wildlife habitat areas, including habitats of concern.
"p" and "n" overlay zones	The proportion of sites with any Environmental Protection (p) or River Natural (n) overlay zones are derived from Bureau of Planning maps, February 2003.
Proximity to residential zone	Distance is measured from the nearest residential zone to the GIS-determined centroid of each site, derived from City of Portland official zoning maps, April 2003.

Sewer access, or lack of	Sewer collection line data is developed and maintained by the Bureau of Environmental Services, May 2003. Adjacent sewer access to a site is flagged if a collection line is within 50 feet or less from the boundary of the site.
Wetland	This layer is the National Wetland Inventory (NWI) with revisions made by local governments in the tri-county region. These revisions were coordinated by Metro's Growth Management Department, 1998.

D. Limitations and Next Steps

The Bureau of Planning pulled together data from various sources, mostly included in their original form, to populate the inventory database—a process that revealed many limitations in the data for describing industrial areas and the developability of sites in these areas. Potential exists for substantial refinement of the inventory in its current form, depending on how, and how extensively, the inventory information will be used. Some of the data limitations are evident in the previous section describing the various database fields and their source data. The following discussion highlights issues that warrant specific mention or further explanation. Next steps could be taken as a second phase of preparing the inventory or as future research.

Determination of Sites

The steps used to define sites in the database are described above. Additional steps of varying complexity could be taken to further refine site boundaries.

- Some single sites may be shown currently as multiple sites. Adjacent sites that have the same property owner, but substantially different owner names, such as Darigold and Land O'Lakes, have not been consolidated. To do so consistently could be done by reviewing aerial photos of the entire study area and highlighting where properties function as a single site, with selected confirmation by field investigation.
- Some small sites may be not be practical development sites for a variety of reasons. They may be portions of private roads, railroad right-of-way, narrow riverfront strips of land under separate ownership, or similar types of exceptions. There are 387 sites in the inventory under 5,000 square feet in size.
- Some site definitions may not match how the site is used. Building polygons were also intersected with sites to consider aligning site boundaries with building boundaries. However, questionable site boundaries were not adjusted because of the difficulty of identifying separate, adjacent buildings on a consistent basis.

Geographical Accuracy of Employers

Only 44 percent of the 4,022 inventory sites, representing 36 percent of the inventory acreage, have ES202 employment data points on them, a proportion that is surprisingly low. Also, 37 percent of the 1,767 sites with employment data points have more than one employer, representing 52 percent of the acreage in sites with employment data points. Many factors could explain the high proportion of sites without employment.

- Some employer points are not positioned on the correct sites. Only the employment points geocoded by Metro that fell within a right-of-way were checked for accuracy. Data points were moved onto taxlots to match the A&T site address when possible, and some additional modification of locations was done for employers who clearly matched the taxlot owner name. Further steps could be taken to improve positional accuracy.
- Some single sites may be shown as multiple sites. Some inventory sites could be combined with adjacent sites to more accurately reflect single property ownership, as proposed above.
- Employers with more than one facility may not have reported employment for each location. For example, a firm may report the company's employment at the primary locations where employees report to work and not at all of the industrial facilities where employers actually do work. This limitation is inherent to the ES202 data but could be partly overcome by comparison with Inside Prospects data on employer locations and with field investigation.

Land Area by Industry

The database provides the opportunity to describe the site size characteristics of each industry and the mix of employers on multiple-employer sites—topics that appear ripe for further study. However, the database in its current form has two significant limitations for relating land area to industries.

- Most of the inventory area is on sites that are not linked to specific employers and industries. As described in the preceding section, 64 percent of the inventory area is in sites that have no ES202 employer points. This is partly because an estimated 26 percent of the inventory area is vacant (unimproved). Another factor is that some very large transportation facility sites, such as rail yards, have no mapped employers on them or have non-transportation employers that do not adequately represent the use of the site. The combination of rail yards, public marine terminals, and the airport account for about 20 percent of the inventory acreage, which could be specifically allocated to transportation, at least as the predominant use. Steps to refine site boundaries and the positional accuracy of employer points could further reduce the acreage of developed, non-transportation sites with no employer points.
- About half of the acreage in sites with employer points have more than one employer. Therefore, a methodology is needed for allocating the acreage of multiple-employer sites to specific industries. City staff suggestions for allocating that acreage include identifying the predominant use of larger industrial sites, excluding service sector employers on large industrial sites (such as a cafeteria in a manufacturing plant), and apportioning the acreage of smaller sites evenly among the on-site employers. Identifying patterns in the mix of industries on large multiple-employer sites could also provide useful information about the beneficial co-location of industries.

Vacant, Buildable Lands

- The land supply identified as vacant and buildable is neither complete nor definite. The inventory incorporated the existing classification of vacant, buildable lands that Metro has applied to industrial areas at the regional level. That classification methodology identifies vacant land from aerial photography and then deducts Title 3 lands with significant development constraints, including wetlands and surrounding 50-foot buffers, 100-year floodplain, 1996 flood inundation area, and riparian buffers. However, development is feasible in some of the excluded areas deemed unbuildable and may be very constrained on some of the included sites. For example, development is allowed in floodplain areas, subject to floodproofing and balanced cut-and-fill requirements. The inventory also included data on a range of development constraints that further inform this analysis. The demand analysis and case studies being prepared by ECONorthwest and Group Mackenzie may suggest areas for further refinement of Metro's classification methodologies of buildable, vacant land, which may require augmenting the inventory.
- The inventory's Tier A classification of "development ready" vacant lands is not necessarily complete. The inventory incorporated Metro's existing Tier A-D classification of development constraints on vacant industrial sites developed in the *Regional Industrial Lands Study* (RILS). A shortcoming of that analysis is that Tier B is used to describe a very large share of vacant, buildable land (67 percent of vacant, buildable land in Portland), and the extent of development constraints (or readiness for development) on that land varies widely. The "land-banked" (vacant 2+ acre portions of occupied sites) and lease only portions of Tier B land may be suitable for immediate development to a limited range of industrial uses. How limited is a question for further study. The demand analysis and case studies may also suggest areas for further refinement of the RILS tiers of industrial development constraints.

Substandard Streets and Infrastructure

- The ability to describe the infrastructure limitations of sites and districts is inherently limited. Staff from the Portland Office of Transportation and Bureau of Environmental Services were contacted for information on industrial site constraints and district capacity, and they pointed out that an adequate assessment depends largely on the specific type and scale of development being proposed. In general, the City's industrial districts are developed urban areas with capacity for growth, and industrial facilities with special infrastructure needs can usually be accommodated although the cost may be prohibitive for a given project. Researching those development constraints on a hypothetical basis may not be cost effective.

- The limited data in the inventory on infrastructure constraints could be augmented. Projects in Portland's Capital Improvements Program that will expand the development capacity in specific industrial areas have been identified in the inventory. Also, sites without on-site or adjacent sewer collection lines have been identified. Limited information on substandard streets could be added to the inventory, but it will not include cost estimates of street improvements that may be required for new development on vacant sites. Level-of-service assessments have been done on some streets and intersections but they are not comprehensive for industrial areas. The "Truck Access and Circulation Analysis" currently being prepared by the Portland Office of Transportation may provide, or identify the need for, additional capacity analysis for truck circulation.

Brownfields

- Some environmental cleanup and investigation sites have not been included. The Oregon Department of Environmental Quality lists 511 sites in Portland within its Environmental Cleanup Site Information Database as of May 22, 2003. Of these 511 sites, the Bureau of Planning confirmed and geocoded 298 sites within the inventory area, and another 123 are clearly located outside of the inventory area. The 90 remaining sites in the DEQ inventory were not geocoded, because either the location could not be confirmed from the DEQ information available, the project site is identified in a right-of-way or river, or the project site covers multiple properties. Additional steps could be taken to link more of the identified cleanup projects to industrial sites in the inventory. Even then, the DEQ database only covers the investigation and cleanup sites that have been reported. The number of unreported sites is not known.
- The identified locations of environmental cleanup and investigation projects are approximate. The cleanup and investigation projects cited in the inventory are linked to industrial sites, but no information was available on a consistent basis to determine the location of contaminants within the site or the amount of land affected.

2. Citywide Industrial Lands Summary

A. Land and Employment by District

Portland has approximately 16,600 acres of land (generally excluding right-of-way) in the inventory area, which is essentially the city's industrial land supply. This area includes all properties with industrial or general employment zoning or with corresponding designations in Portland's *Comprehensive Plan* as of April 2003. The inventory area is divided into about 4,000 "sites," generally defined here as adjacent taxlots under single ownership. In 2000, the businesses located on these lands employed an estimated 108,800 workers. The average number of jobs per acre was 6.5. The Columbia Corridor and Portland Harbor areas located along the Columbia and Willamette Rivers account for 92 percent of the inventory area.

District	Citywide Inventory Area 2003				Employment 2000		
	Sites	District Share	Acreage	District Share	Jobs	District Share	Jobs Per Acre
Banfield	80	2%	117	1%	1,966	1.8%	16.8
Columbia Corridor	1,518	38%	8,428	51%	40,992	37.7%	4.9
Airport	976	24%	5,780	35%	26,071	24.0%	4.5
Columbia Corridor East	393	10%	1,731	10%	12,748	11.7%	7.4
Columbia Corridor West	149	4%	917	6%	2,173	2.0%	2.4
Portland Harbor	1,218	30%	6,956	42%	41,946	38.5%	6.0
NW Industrial	605	15%	1,759	11%	17,659	16.2%	10.0
Rivergate	330	8%	4,154	25%	9,309	8.6%	2.2
Swan Island/Lower Albina	283	7%	1,042	6%	14,978	13.8%	14.4
Inner Eastside	890	22%	633	4%	19,723	18.1%	31.2
Outer Southeast	303	8%	472	3%	3,848	3.5%	8.2
Outliers	13	0%	17	0%	343	0.3%	20.4
All Districts	4,022	100%	16,623	100%	108,818	100.0%	6.5

B. Industries by Employment

An estimated 3,600 businesses employed 108,800 workers in the inventory area in 2000, which is about 28 percent of Portland's total employment. Three fourths of the inventory area jobs were in the industrial sectors: 32 percent in manufacturing, 19 percent in transportation, 17 percent in wholesale trade, 7 percent in construction, and 1 percent in communication and utilities. Portland's largest industrial specialties are transportation (about 20,700 jobs), transportation equipment manufacturing (8,700 jobs), and primary metals manufacturing (5,300 jobs), each of which have 60 percent or more of their metro area employment (Oregon portion) located in Portland's industrial areas.

Industry Segments*	SIC	Firms & Jobs 2000				Portland Specialties		Yearly Pay per Worker	
		Firms	Jobs/ Firm	Jobs	Share of District Jobs	Inventory Area Share of Metro Area Jobs	Metro Area Location Quotient**	Average Pay, Multnomah County	Percent of Pay in All Industries
Construction	15-17	294	26	7,752	7%	17%	1.10	\$46,355	126%
Manufacturing	20-39	673	51	34,466	32%	27%	1.12	\$43,745	119%
Food products	20	46	65	2,979	3%	38%	0.75	\$36,320	99%
Apparel & textiles	22-23	25	19	467	0%	20%	0.33	\$27,979	76%
Wood products	24	39	23	891	1%	12%	1.45	\$52,094	142%
Furniture & fixtures	25	25	36	902	1%	37%	0.71	\$33,547	91%
Paper products	26	19	39	736	1%	24%	0.74	\$49,279	134%
Printing & publishing	27	91	30	2,759	3%	27%	1.08	\$42,480	115%
Chemical products	28	29	26	754	1%	45%	0.26	\$47,871	130%
Petroleum products	29	6	52	313	0%	100%	0.39	\$45,977	125%
Rubber & plastics	30	27	20	536	0%	11%	0.77	\$32,479	88%
Stone, clay & glass	32	27	40	1,085	1%	34%	0.90	\$39,019	106%
Primary metal industries	33	26	202	5,260	5%	71%	1.71	\$48,014	130%
Fabricated metal products	34	112	29	3,214	3%	31%	1.10	\$35,503	96%
Industrial machinery	35	95	25	2,413	2%	18%	1.05	\$47,163	128%
Electronic equipment	36	19	116	2,200	2%	8%	2.62	\$48,313	131%
Transportation equipment	37	42	208	8,724	8%	72%	1.05	\$51,232	139%
Instruments	38	12	30	356	0%	4%	1.61	\$36,240	98%
Miscellaneous manufacturing	39	28	23	642	1%	26%	0.99	\$28,355	77%
Transportation	41-47	399	52	20,651	19%	60%	1.30	\$36,453	99%
Local and interurban transit	41	17	183	3,107	3%	100%	0.99	\$19,632	53%
Trucking & warehousing	42	217	29	6,328	6%	41%	1.34	\$38,115	104%
Water transportation	44	24	57	1,375	1%	62%	1.85	\$52,121	142%
Air transportation	45	51	173	8,813	8%	85%	1.28	\$35,237	96%
Transportation services	47	89	11	961	1%	26%	1.30	\$35,338	96%
Communication & Utilities	48-49	33	36	1,175	1%	8%	0.90	\$81,345	221%
Wholesale Trade	50- 51	965	19	18,807	17%	30%	1.45	\$43,884	119%
Retail Trade	52- 59	385	25	9,568	9%	6%	1.02	\$20,869	57%
Finance, insurance, real estate Services	60-69 70-89	112 723	11 19	1,207 13,926	1% 13%	2% 6%	1.18 1.02	\$47,093 \$33,500	128% 91%
Government	90-98	7	158	1,106	1%	1%	0.82	\$38,709	105%
Nonclassifiable	99	34	4	120	0%	26%	0.22	\$38,615	105%
Combined Industrial Sectors	15-51	2,368	35	82,891	76%	29%	1.18	\$45,607	124%
All Industries	01-99	3,629	30	108,818	100%	13%	1.00	\$36,797	100%

* Data on some industry segments is suppressed to meet confidentiality requirements. As a result, the numerical totals for some

sectors and combined sectors do not match those of the industry segments shown.

** Share of Portland metro area employment (Oregon portion) in this industry divided by the share of U.S. employment in the industry.

Data Sources: "Covered employment" data from Oregon Employment Department and U.S. Bureau of Labor Statistics.

C. Land Supply Characteristics

Vacant Land

Metro estimated the amount and location of vacant, buildable industrial land in 2000 by identifying apparently unimproved sites from aerial photos and excluding from these sites any Title 3 lands, which consist of identified wetlands and 50-foot buffers, 100-year floodplain, 1996 flood inundation area, and riparian buffers. According to this analysis, Portland has approximately 2,000 acres of what Metro generally categorizes as vacant, buildable land in the inventory—12 percent of the total acreage in the inventory.

Metro further categorized those 2,000 acres by types of development constraints, using the Tier A-D criteria developed by Otak in the *Regional Industrial Lands Study* (RILS) in 1999. Applying those criteria, Portland has an estimated 224 acres of vacant industrial land that is “development ready,” meeting the “Tier A” criterion of no identified development constraints. Two thirds of Portland’s vacant, buildable industrial land is in Tier B (1,338 acres), which is constrained by “landbanked” corporate ownership, lease-only requirements, access limitations, or unstable soils. Within this inventory, the Bureau of Planning further divided Tier B land into partly occupied and unoccupied sites, as a general indication which sites are constrained by landbanked ownership, based on the locations of employers identified in ES202 data by the Oregon Employment Department. An estimated 557 acres, 42 percent of all Tier B land, appears to be on partly occupied sites. Tier C includes 315 acres of land in Portland that is constrained by being undersized (less than 1 acre) or overvalued. An additional 126 acres is in Tier D, which is classified as redevelopable land with floor area ratio of less than 10 percent and constrained by buildings, brownfields, or existing uses.

	Total Vacant 2001	Buildable Vacant Land 2000 (deducting Title 3 lands)						
		Tier A - no constraints	Tier B - unoccupied	Tier B - part occupied	Tier C- infill	Tier C - overvalue d	Tier D - redevelop	Total Buildable
Sites	809	52	89	52	325	83	94	605
Acres	4,262	224	782	557	161	154	126	2,004
Vacancy Rate	26%	1%	5%	3%	1%	1%	1%	12%

Vacant Acres in Districts

Banfield	29	0	5	20	3	1	0.06	28
Columbia Corridor	2,567	174	389	328	88	54	88	1123
Airport	1,520	26	177	292	56	40	22	613
Columbia Corridor East	772	148	208	34	22	11	65	489
Columbia Corridor West	275	0	4	2	10	3	1	21
Portland Harbor	1,532	50	386	188	54	90	33	801
NW Industrial	316	3	34	83	27	26	9	182
Rivergate	1,137	47	330	101	21	46	21	566
Swan Island/Lower Albina	79	0	22	4	6	18	3	53
Inner Eastside	17	0	0	3	5	4	5	17
Outer Southeast	112	0.3	0	15	10	5	0.2	30
Outliers	3	0	0	2	2	0	0	5

Data source: Metro

Site Size

Average site size in the inventory area is about 4 acres. Forty-seven sites (developed and undeveloped) are 50 acres or larger in size, representing 43 percent of the total inventory acreage.

	< 3 Acres	3 - 9 Acres	10 - 19 Acres	20 - 49 Acres	50 + Acres	Average Site Size	Median Site Size
Sites	3,247	489	162	77	47		
% of All Sites	81%	12%	4%	2%	1%		
Acres	2,293	2,609	2,241	2,263	7,217	4.1	0.64
% of All Acres	14%	16%	13%	14%	43%		

Zoning

The *Portland Zoning Code* applies General Industrial (IG1 and IG2) zoning to 51 percent of the inventory area. Another 35 percent has Heavy Industrial (IH) zoning. General Employment (EG1 and EG2) zones apply to only 8 percent of the inventory area. The IG1 and EG1 zones emphasize small-lot development. Other zones (Open Space, Residential, Commercial, and Central Employment) make up 6 percent of the inventory area. The land area in other zones is included in the inventory because all or part of the affected taxlots have Industrial Sanctuary or Mixed Employment designations in Portland's *Comprehensive Plan*.

	Heavy Industrial	General Industrial		Employment		Other
	IH	IG1	IG2	EG1	EG2	
Acres	5,894	756	7,700	52	1,250	971
% of All Acres	35%	5%	46%	0.3%	8%	6%

Assessed Property Value

Assessed values determined by Multnomah County Assessment and Taxation Division serve as a proxy for market property values. The average assessed land value per square foot in the inventory area is \$6.58, and the average assessed value of property improvements per square foot is \$7.24. The average improvements-to-land-value ratio is 110 percent.

	Total Value, All Sites (\$000)	Higher Valued Sites*		Average Value per Square Foot	Improvements to Land Value Ratio
		Sites	% of All Sites		
Land	\$4,763,341	1,570	39%	\$6.58	110%
Improvements	\$5,245,879	1,804	45%	\$7.24	
Total	\$10,009,224	1,821	45%	\$13.82	

* Sites in district with value per square foot at least 120% of the average in all districts.

Industry Mix

Analysis of land area by industry has been postponed to a second phase of the inventory. To relate industry mix to land area, a more accurate analysis can be developed following the recommended database refinements in Chapter 1, including adjustments to employer locations and site boundaries (e.g., removing fragments and right-of-way), as well as field review.

D. Site Advantages

Transportation Access

Sixty-eight percent of the acreage in the inventory area is on sites within two miles of a freeway on-ramp or off-ramp, and 66 percent is on sites within one mile of a Regional or Major Truck Street, as designated in the Portland's

Transportation System Plan. Rail access is potentially available to 30 percent of the inventory acreage on sites with adjacent or on-site heavy rail lines. Deep channel maritime access is potentially available to 18 percent of the inventory acreage on sites along Portland Harbor between the river and the nearest street or railroad right-of-way. Ninety percent of the inventory area is on sites within a half-mile, approximately a 10-minute walk, from a bus stop.

Miles from site	Major Truck Street				Freeway				Airport			
	Sites	% of All Sites	Acres	% of All Acres	Sites	% of All Sites	Acres	% of All Acres	Sites	% of All Sites	Acres	% of All Acres
Less Than 1	3,664	91%	10,967	66%	2,311	57%	7,202	43%	38	1%	2,107	13%
Between 1 - 2	349	9%	5,621	34%	1,150	29%	4,142	25%	411	10%	1,919	12%
Between 2 - 5	9	0%	35	0%	537	13%	5,103	31%	1,085	27%	3,349	20%
Greater than 5	0	0%	0	0%	24	1%	175	1%	2,488	62%	9,248	56%

Railroad Access (Adjacent)				Harbor Access (Adjacent)				Bus Stop within 1/2 mile			
Sites	% of All Sites	Acres	% of All Acres	Sites	% of All Sites	Acres	% of All Acres	Sites	% of All Sites	Acres	% of All Acres
737	18%	4,984	30%	204	5%	3037	18%	3,945	98%	14,927	90%

Access to Public Redevelopment Financial Tools

Industrial sites that have access to public redevelopment financial tools may be considered advantageous by property owners, business owners, or land developers who are considering making real estate investments. Thirty-eight percent of all sites in the inventory area (22 percent of all acreage) are within one of the city's ten urban renewal areas. Urban renewal is a state sanctioned program designed to help communities improve and redevelop areas that are physically deteriorated, unsafe, or poorly planned. In urban renewal areas, public investment is used to stimulate private investment on a much larger scale. The amount of urban renewal funds invested in any one area is small compared to the private investment that follows. Urban renewal is primarily used to update and improve an area's infrastructure—through capital expenditures on transportation improvements and parks, for example—and to provide incentives for desired development such as affordable housing, family-wage jobs and building refurbishment. The result is that private investments pay for the lion's share of new building construction and renovation costs in urban renewal areas.

Over half of all sites (51 percent) in the inventory area are in the “enterprise zone.” The N/NE Portland Enterprise and Electronic Commerce Zone is a public/private partnership program managed by the Portland Development Commission. It provides a 5-year property tax abatement on new investment, and in certain cases, a 25 percent state income/excise tax credit, in exchange for meeting job creation and other requirements aimed at business creation within N/NE Portland. Companies may benefit if they lease, as long as they are responsible for property tax payments.

Thirty percent of the city's industrial sites are in census tracts that qualify as eligible for “New Markets” tax credits. The Portland New Markets Program, sponsored by PDC, seeks to facilitate long-term economic growth and community development in Portland's low-income communities by utilizing the federally funded New Markets Tax Credit Program. Through the program, PDC expects to attract and utilize new private funding sources for investment in job creation and training, affordable housing development, business development, public use projects, and other initiatives designed to enhance livability and stimulate economic growth.

Urban Renewal Area				Enterprise Zone		New Market Tax Credits	
Sites	% of All Sites	Acres	% of All Acres	Sites	% of All Sites	Sites	% of All Sites
1,532	38%	3,690	22%	2,034	51%	1,194	30%

E. Site Constraints

Environmental Site Constraints

Reflecting the location of most of Portland's industrial land along its rivers, 28 percent of the inventory area is within floodplain areas (100-year floodplain and/or 1996 flood inundation area). A composite environmental constraints layer was developed for the inventory, consisting of lands with floodplain, 10 percent or greater slopes, wetlands, and/or environmental protection (p or n) zones. This composite environmental constraints coverage applies to 35 percent of the inventory area. Metro's (2003) regional inventory of significant wildlife or riparian habitat, developed to comply with Statewide Planning Goal 5, applies to 28 percent of the industrial inventory area.

	Sites	% of All Sites	Acres	% of All Acres
Environmental Protection Zone (p)	218	5%	987	6%
Greenway Natural Zone (n)	18	0.4%	52	0.3%
100 Year Floodplain	861	21%	4,151	25%
Additional 1996 Flood Inundation Area	174	4%	469	3%
Title 3 Wetlands	154	4%	989	6%
10% or Greater Slope	1,745	43%	1,544	9%
Composite Constraints (all of above)	2,020	50%	5,863	35%
Goal 5 Significant Habitat Inventory	1,098	27%	4,621	28%

Proximity to Residential Zones

Nearby housing represents a potential constraint for industrial activities with significant off-site impacts. Two percent of the inventory area is on sites within 200 feet of a residential zone, and 12 percent is on sites within 500 feet of a residential zone.

Distance from site	Sites	% of All Sites	Acres	% of All Acres
Less than 200 feet	525	13%	294	2%
200 – 500 feet	988	25%	1,736	10%

Sites Lacking On-site or Adjacent Sewer

Three percent of the inventory acreage is on sites that lack on-site or adjacent access to public sewer collection lines.

Sites	% of All Sites	Acres	% of All Acres
356	9%	455	3%

Environmental Site Cleanup or Investigation Projects

The Oregon Department of Environmental Quality lists 511 sites in Portland within its Environmental Cleanup Site Information Database (May 22, 2003). Of these 511 sites, the Bureau of Planning confirmed and geocoded 298 sites within the inventory area. That list is not complete, because more information is needed to confirm the location of 90 of the DEQ project sites, as described in Chapter 1. Also, some cleanup and investigation sites are not reported to DEQ. Of the 298 project sites confirmed in the inventory area, 238 are active environmental cleanup or investigation projects. The other 60 are either completed cleanup projects or have received "no further action required" determinations by DEQ, indicating that they pose no significant threat to human health or the environment.

3. Industrial District Summaries

A. Airport

The Airport district is the portion of the Columbia Corridor situated between the I-5 and I-205 Freeways.

- 5,780 acres in Airport district
- 35% share of the acreage in all Portland industrial districts
- 976 sites (adjacent taxlots under single ownership)

Industry Mix

In the Airport district, an estimated 890 businesses employed 26,000 workers in 2000. Three fourths of those jobs were in the industrial sectors. Not surprisingly, air transportation is the largest industry specialty in that district, having an estimated 6,600 jobs that represent 64 percent of the metro area's (Oregon portion) employment in the industry. Other industrial specialties of the Airport district include trucking and warehousing, primary metals manufacturing, food products manufacturing, transportation services, and stone/clay/glass manufacturing, each of which have relatively high concentrations of their metro area employment in the Airport district.

Largest 15 Industry Segments

Largest 15** Industry Segments	Firms & Jobs 2000				District Specialties		Yearly Pay per Worker	
	Firms	Jobs/ Firm	Jobs	Share of District Jobs	District Share of Metro Jobs	Location Quotient*	Average Pay, Multnomah County	Percent of Pay in All Industries
Air Transportation	47	141	6,646	25%	64%	20.92	\$35,237	96%
Wholesale Trade	222	19	4,313	17%	7%	2.23	\$43,884	119%
Services	175	21	3,745	14%	2%	0.51	\$33,500	91%
Retail Trade	104	21	2,205	8%	1%	0.48	\$20,869	57%
Trucking & Warehousing	70	30	2,075	8%	13%	4.39	\$38,115	104%
Construction	54	19	1,015	4%	2%	0.73	\$46,355	126%
Food Products Mfg.	12	62	748	3%	9%	3.08	\$36,320	99%
Primary Metals Mfg.	7	103	720	3%	10%	3.15	\$48,014	130%
Printing & Publishing	10	67	674	3%	6%	2.11	\$42,480	115%
Fabricated Metal Products	25	24	588	2%	6%	1.83	\$35,503	96%
Industrial Machinery Mfg.	24	21	498	2%	4%	1.18	\$47,163	128%
Transportation Equipment Mfg.	11	38	414	2%	3%	1.11	\$51,232	139%
Transportation Services	32	12	395	2%	10%	3.41	\$35,338	96%
Stone, Clay & Glass Products	4	75	301	1%	9%	3.03	\$39,019	106%
Combined Industrial Sectors	576	34	19,618	75%	7%	2.24	\$45,607	124%
All Industries	894	29	26,065	100%	3%	1.00	\$36,797	100%

* Share of the district's employment in this industry divided by the share of metro area (Clackamas, Columbia, Multnomah,

Washington, Yamhill Counties) employment in the industry.

** Data on the fifteenth largest industry was suppressed for confidentiality.

Sources: Bureau of Planning calculations from Oregon Employment Department and U.S. Bureau of Labor Statistics data on

"covered employment."

Largest Employers

	Industry	Employment
Horizon Air-Flight Operations	Air Transportation Scheduled	500+
Sapa Anodizing, Inc.	Special Industry Machinery	500+
Portland Meadows	Racing Including Track Operation	250-499
Yellow Freight Systems	Trucking Except Local	250-499
T C Advertising, Inc. -Plant	Commercial Printing	250-499
Consolidated Freightways	Trucking Except Local	250-499
Market Transport Ltd.	Local Trucking Without Storage	250-499
Oak Harbor Freight Lines	Trucking Except Local	250-499
United Airlines	Air Transportation Scheduled	250-499
Performance Warehouse	Automotive Parts And Supplies	250-499
Huntleigh USA	Detective Guard And Armored Car Services	250-499
Laidlaw Transit, Inc.	School Buses	250-499
Owens Brockway Glass Containers	Glass Containers	250-499
Nabisco, Inc. -Bakery	Cookies And Crackers	250-499
Jubitz Corp. -Admin. Office	Gasoline Service Stations	250-499
Halton Company	Construction And Mining Machinery	250-499

Source: Inside Prospects

Land Supply Characteristics

Site Size

Average site size in the Airport district is about 6 acres, compared to a 4-acre average for all districts. Sixty percent of the district's acreage is in sites of 50 acres or larger, the biggest being the site of the airport itself (about 1,800 acres), which raises the district's average site size.

	< 3 Acres	3 - 9 Acres	10 - 19 Acres	20 - 49 Acres	50 + Acres	
Sites	773	127	47	12	17	Average
% of All Sites	79%	13%	5%	1%	2%	Site Size
Acres	642	638	662	345	3492	5.92
% of All Acres	11%	11%	11%	6%	60%	

Vacant Land

The Airport district contained 613 acres of vacant (unimproved), buildable industrial land in 2000 (Metro data), representing about 11 percent of the district's total acreage. Of that vacant land, only 26 acres is rated by Metro as having no identified development constraints (Tier A).

	Total Vacant, 2001	Buildable Vacant Land, 2000 (deducting Title 3 lands)						
		Tier A - no constraints	Tier B - unoccupied	Tier B - part occupied	Tier C - infill	Tier C - overvalued	Tier D - redevelop	Total Buildable
Sites	238	9	26	16	102	24	23	173
Vacant Acres	1,520	26	177	292	56	40	22	613
% of All Acres	26.3%	0.4%	3.1%	5.1%	1.0%	0.7%	0.4%	10.6%

Data source: Metro

Zoning

The *Portland Zoning Code* applies General Industrial (IG2) zoning to 81 percent of the acreage in the Airport district, compared to 46 percent of the acreage in all districts.

	Heavy Industrial	General Industrial		Employment		Other
	IH	IG1	IG2	EG1	EG2	
Acres	230	0	4,700	0	563	288
% of All Acres	4%	0%	81%	0%	10%	5%

Assessed Property Value

The average assessed land value per square foot in the Airport district is \$11.60, compared to an average \$6.58 in all districts. The average improvements-to-land-value ratio in the district is 47 percent.

	Total Value, All Sites (\$000)	Higher Valued Sites*		Average Value per Square Foot	Improvements to Land Value Ratio
		Sites	% of All Sites		
Land	\$2,921,050	114	2.8%	\$11.60	47%
Improvements	\$1,370,350	293	7.3%	\$5.44	
Total	\$4,291,403	249	6.2%	\$17.04	

* Sites in district with value per square foot at least 120% of the average in all districts.

Site Advantages

Transportation Access

This district is the region's air transportation hub. The entire district is within five miles of the airport and 36 percent of the district acreage is on sites within one mile. Sixty-one percent of the acreage in the district is on sites within a mile of a freeway on-ramp or off-ramp, and 94 percent within two miles. Rail access is potentially available to 4 percent of the district acreage on sites with on-site or adjacent to rail lines. Eighty-six percent of the district acreage is on sites within one half mile of a bus stop. MAX light rail also serves the airport.

Miles from site	Major Truck Street				Freeway				Airport			
	Sites	% of All Sites	Acres	% of All Acres	Sites	% of All Sites	Acres	% of All Acres	Sites	% of All Sites	Acres	% of All Acres
< 1	939	96%	3,328	58%	413	42%	3,544	61%	38	4%	2,107	36%
1 to <2	36	4%	2,434	42%	469	48%	1,879	33%	382	39%	1,869	32%
2 to <5	1	0%	18	0%	94	10%	356	6%	556	57%	1,804	31%
5 or more	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%

Railroad Access (Adjacent)				Harbor Access (Adjacent)				Bus Stop within 1/2 mile			
Sites	% of All Sites	Acres	% of All Acres	Sites	% of All Sites	Acres	% of All Acres	Sites	% of All Sites	Acres	% of All Acres
80	8%	248	4%	0	0%	0	0%	931	95%	4,986	86%

Access to Public Redevelopment Tools

Urban Renewal Area

Sites	% of All Sites	Acres	% of All Acres
-------	----------------	-------	----------------

Enterprise Zone

Sites	% of All Sites
-------	----------------

New Market Tax Credits

Sites	% of All Sites
-------	----------------

113	12%	993	17%	964	99%	173	18%
-----	-----	-----	-----	-----	-----	-----	-----

Capital Improvements Plan (CIP) projects

Projects in the City of Portland CIP Database that will expand the district’s development capacity:

- Sewer pipe and pump station (BES005413) - This is the primary project for five phases of a new sanitary sewer system (8,000 feet of pipe; four pump stations) in NE Portland. This system will provide sanitary sewer service to an area from Colwood Way to 42nd Avenue between Columbia Blvd. and the Columbia Slough.
- Freight mobility improvements (PDT000046) - Identify, design, and construct improvements aimed at easing congestion and safety problems in the area bounded by 82nd, Columbia, Killingworth, and I-205. While a primary goal is to improve freight mobility, pedestrian, bicycle, and transit access through the corridor will also be addressed. Project funding secured.
- NE Columbia turn lane (PDT000117) - Provide a right turn lane on NE Columbia Blvd. at NE MLK Blvd. Construction, construction engineering, right-of-way and contingency are not currently funded. Total project costs are estimated at \$942,800.
- NE 33rd slough crossing (PDT000088) – Replace the east half of NE 33rd Ave. over the Columbia Slough with a new concrete structure. Existing timber/concrete structure is approaching end of life cycle.
- NE 33rd/Lombard bridge upgrade (PDT000087) - NE 33rd Ave over NE Lombard St. and Union Pacific Railroad tracks. This structure is currently posted due to insufficient flexural capacity on the main and approach spans. Project will repair and rehabilitate these items, returning the structure to full capacity.
- Clark Road upgrade (PDT000033) - Upgrade Clark Road (between Glass Plant Road & 105th/Holman) and the intersection of Clark/105th/Holman to city standards. Curbs, drainage, walkways, and bikeway will be installed. The Port of Portland is extending Alderwood Road from its existing terminus east of International Parkway to Glass Plant Road in the summer of 2001. Clark Road will then provide connectivity between Portland International Center (PIC) and areas east of I-205. The improved undercrossing is expected to ease congestion at the adjacent I-205 overcrossings and provide important pedestrian/bicycle connectivity between the I-205 multi-use path and PIC.
- Non-potable water system (WTR000152) - Build non-potable water system for irrigation and cooling water. Limits: NE Airport Way, I-205 to NE 82nd Avenue. Lead Project: WTR000248 Water Reuse & Alternate Use.
- Intersection and street improvements (PDC000035) - Improve infrastructure to support market access and traffic capacity for the east/west streets. This includes funding for expansion/upgrade of NE Clark-Holman area intersections and the connection of Alderwood Road to the Portland International Center.

Development Constraints

Environmental Constraints

An estimated 27 percent of the district acreage is affected by environmental constraints within a composite layer developed for the inventory, consisting of lands with floodplain, 10 percent or greater slopes, wetlands, and/or environmental protection (p or n) zones. Twenty percent of the district acreage is in the floodplain.

	Sites	% of All Sites	Acres	% of All Acres
Environmental Protection Zone (p)	40	4%	137	2%
Greenway Natural Zone (n)	0	0%	0	0%
100 Year Floodplain	332	34%	1,123	19%
Additional 1996 Flood Inundation Area	26	3%	34	1%
Title 3 Wetlands	76	8%	190	3%
10% or Greater Slope	603	62%	410	7%
Composite Constraints (all of above)	656	67%	1,532	27%
Goal 5 Significant Habitat Inventory	347	36%	1,088	19%

Proximity to Residential Zones

Ten percent of the district acreage is on sites within 500 feet of a residential zone, and 2 percent is on sites within 200 feet, posing potential constraints for industrial activities with off-site impacts.

Distance from site	Sites	% of All Sites	Acres	% of All Acres
Less than 200 feet	186	19%	117	2%
200 - 500 feet	228	23%	454	8%

Sites Lacking On-Site or Adjacent Sewer

Only 2 percent of the district acreage is on sites that lack on-site or adjacent access to public sewer collection lines.

Sites	% of All Sites	Acres	% of All Acres
158	16%	107	2%

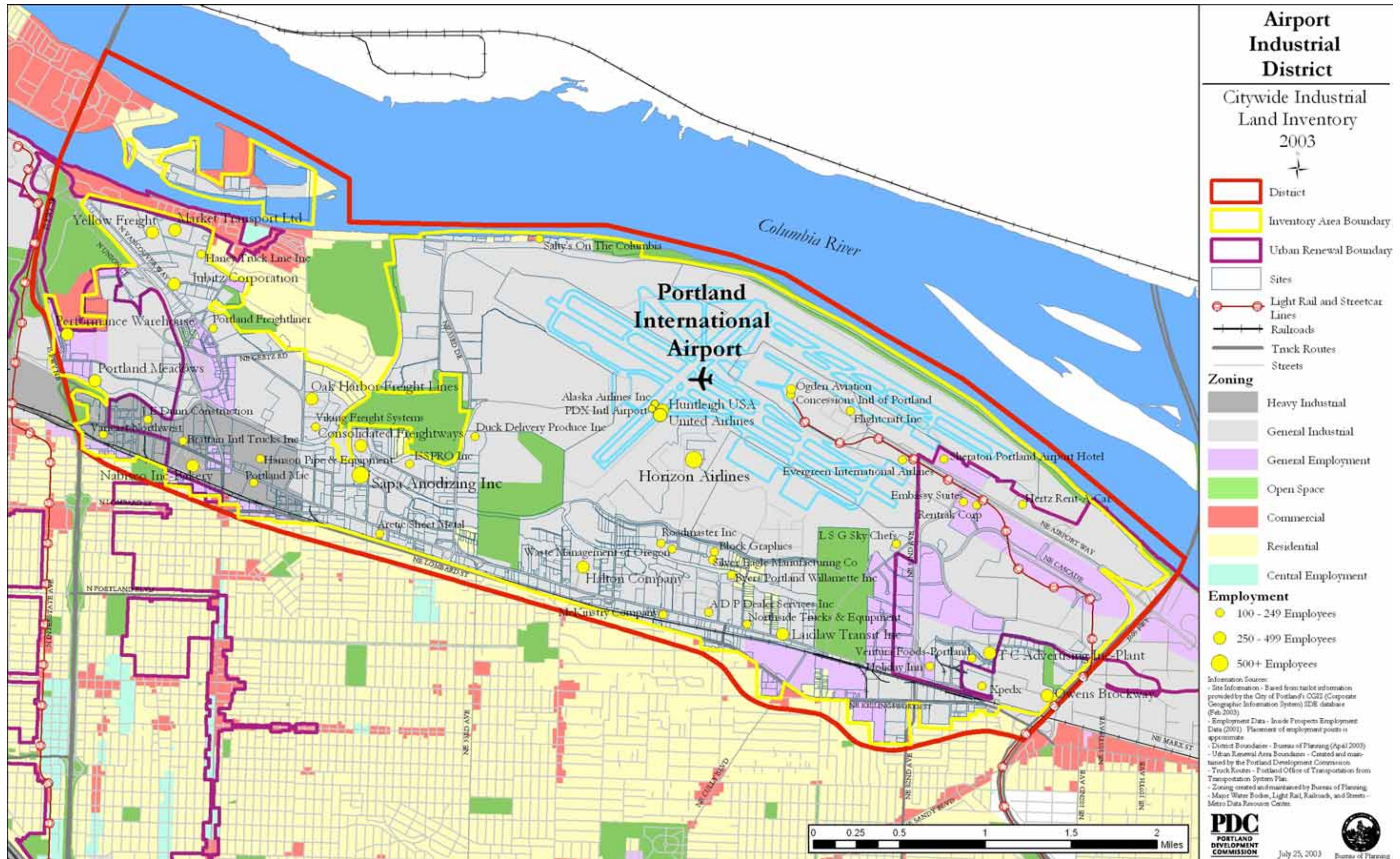
Environmental Site Cleanup or Investigation Projects

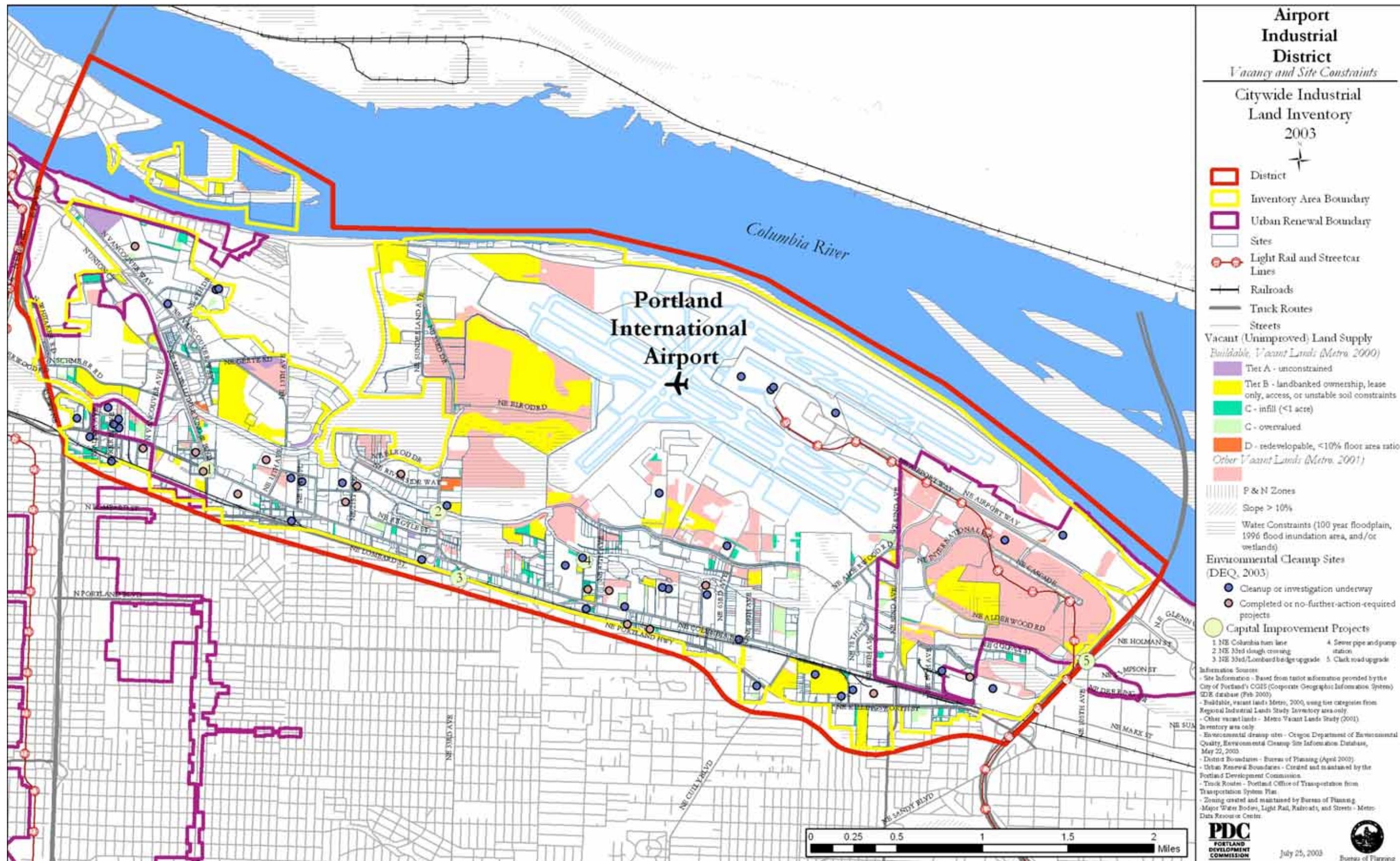
40 identified sites in the district have environmental cleanup or investigation projects underway.

16 identified sites in the district have completed cleanup projects or "no further action required" determinations

by DEQ, indicating that they pose no significant threat to human health or the environment.

Source: Oregon Department of Environmental Quality, Environmental Cleanup Site Information database, May 2003





B. Banfield

The Banfield district is the group of small industrial areas along the I-84 Freeway west of the I-205 Freeway.

- 117 acres in district
- 0.7% share of the acreage in all Portland industrial districts
- 80 sites (adjacent taxlots under single ownership)

Industry Mix

In the Banfield district, an estimated 70 businesses employed nearly 2,000 workers in 2000. Only 43 percent of those jobs were in the industrial sectors, compared to a 76 percent average for all inventory districts. Thirty-five percent of the district's employment was in services, 22 percent in wholesale trade, and 21 percent in retail trade.

Largest Industry Segments

Largest** Industry Segments	Firms & Jobs, 2000				District Specialties		Pay per Worker	
	Firms	Jobs/ Firm	Jobs	Share of District Jobs	District Share of Metro Jobs	Location Quotient*	Average Pay, Multnomah County	Percent of Pay in All Industries
Services	20	35	690	35%	0%	1.24	\$33,500	91%
Wholesale Trade	22	19	427	22%	1%	2.92	\$27,979	76%
Retail Trade	13	32	421	21%	0%	1.22	\$20,869	57%
Construction	6	15	90	5%	0%	0.86	\$46,355	126%
Combined others***	13	26	338	17%				

(printing & publishing; wood products mfg.; industrial machinery mfg.; stone, clay & glass mfg.; food products mfg.;

rubber & plastics mfg.; apparel & textiles mfg.; fabricated metal products mfg.; and non-classified establishments)

Combined Industrial Sectors	40	21	851	43%	0%	1.29	\$45,607	124%
All Industries	74	27	1,966	100%	0%	1.00	\$36,797	100%

* Share of the district's employment in this industry divided by the share of metro area (Clackamas, Columbia, Multnomah, Washington, Yamhill Counties) employment in the industry.

** The Banfield area firms span only 13 industry segments, all of which are included in the table.

*** Remainder of largest 13 industries are combined, because data on individual industries is suppressed.

Sources: Bureau of Planning calculations from Oregon Employment Department and U.S. Bureau of Labor Statistics data on "covered employment."

Largest Employers

	Industry	Employment
ABM Janitorial Services	Building Maintenance Services	500+
Albina Fuel Co.	Fuel Oil Dealers	100-249
Oregon Catholic Press	Newspapers	100-249

Source: Inside Prospects

Land Supply Characteristics

Site Size

Average site size in the Banfield district is 1.5 acres, compared to a 4-acre average in all districts. Seventy-two percent of the district acreage is in sites less than 10 acres in size, compared to an average 30 percent of the acreage in all inventory districts.

	< 3 Acres	3 - 9 Acres	10 - 19 Acres	20 - 49 Acres	50 + Acres	
Sites	68	10	1	1	0	Average Site Size
% of All Sites	85%	13%	1%	1%	0%	
Acres	42	42	12	22	0	1.46
% of All Acres	36%	36%	10%	19%	0%	

Vacant Land

The Banfield district contains 28 acres of vacant (unimproved), buildable land, representing about 24 percent of the district acreage.

	Total Vacant 2001	Buildable Vacant Land 2000 (deducting Title 3 lands)						Total Buildable
		Tier A - no constraints	Tier B - unoccupied	Tier B - part occupied	Tier C - infill	Tier C - overvalued	Tier D - redevelop	
Sites	11	0	1	1	6	1	2	10
Vacant Acres	29	0	5	20	3	1	0.06	28
% of All Acres	24.8%	0.0%	4.3%	17.1%	2.6%	0.9%	0.1%	23.9%

Data source: Metro

Assessed Property Value

The average assessed land value per square foot in the Banfield district is \$5.14. The average improvements-to-land-value ratio in the district is 211 percent, compared to an average 110 percent for all inventory districts.

Assessed Property Value:

	Total Value, All Sites (\$000)	Higher Valued Sites*		Average Value per Square Foot	Improvements to Land Value Ratio
		Sites	% of All Sites		
Land	\$26,210	38	0.9%	\$5.14	211%
Improvements	\$55,347	49	1.2%	\$10.86	
Total	\$81,557	53	1.3%	\$16.00	

* Sites in district with value per square foot at least 120% of the average in all districts.

Zoning

The *Portland Zoning Code* applies General Employment (EG1 or EG2) zoning to 70 percent of the acreage in the Banfield district, compared to 8 percent in all districts.

	Heavy Industrial	General Industrial		Employment		Other
	IH	IG1	IG2	EG1	EG2	
Acres	7	4	22	6	76	2
% of All Acres	6%	3%	19%	5%	65%	2%

Site Advantages

Transportation Access

Located along the I-84 Freeway, 97 percent of the acreage in the district is on sites within a mile of a freeway on-ramp or off-ramp. Rail access is potentially available to 24 percent of the district acreage at sites with on-site or adjacent access to the Union Pacific rail line. All of the district acreage is within one half mile of a bus stop.

Miles from site	Major Truck Street				Freeway				Airport			
	Sites	% of All Sites	Acres	% of All Acres	Sites	% of All Sites	Acres	% of All Acres	Sites	% of All Sites	Acres	% of All Acres
< 1	65	81%	114	97%	65	81%	114	97%	0	0%	0	0%
1 to <2	15	19%	3	3%	15	19%	3	3%	0	0%	0	0%
2 to <5	0	0%	0	0%	0	0%	0	0%	80	100%	117	100%
5 or more	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%

	Railroad Access (Adjacent)				Harbor Access (Adjacent)				Bus Stop within 1/2 mile			
	Sites	% of All Sites	Acres	% of All Acres	Sites	% of All Sites	Acres	% of All Acres	Sites	% of All Sites	Acres	% of All Acres
	7	9%	28	24%	0	0%	0	0%	80	100%	117	100%

Access to Public Redevelopment Resources

Urban Renewal Area				Enterprise Zone		New Market Tax Credits	
Sites	% of All Sites	Acres	% of All Acres	Sites	% of All Sites	Sites	% of All Sites
0	0%	0	0%	43	54%	9	11%

Capital Improvements Program (CIP) projects

No capital projects in the City of Portland CIP Database were identified that will expand this specific district's development capacity.

Development Constraints

Environmental Constraints

An estimated 16 percent of the district acreage is constrained by 10 percent or steeper slopes. No sites in the district are affected by floodplain, wetlands, or environmental protection (p or n) zones.

	Sites	% of All Sites	Acres	% of All Acres
Environmental Protection Zone (p)	0	0%	0	0%
Greenway Natural Zone (n)	0	0%	0	0%
100 Year Floodplain	0	0%	0	0%
Additional 1996 Flood Inundation Area	0	0%	0	0%
Title 3 Wetlands	0	0%	0	0%
10% or Greater Slope	33	41%	19	16%
Composite Constraints (all of above)	33	41%	19	16%

Goal 5 Significant Habitat Inventory | 0 0% | 0 0%

Proximity to Residential Zones

Eighty-one percent of the district acreage is on sites within 500 feet of a residential zone, and 24 percent is on sites within 200 feet, posing potential constraints for industrial activities with off-site impacts.

Distance from site	Sites	% of All Sites	Acres	% of All Acres
Less than 200 feet	45	56%	28	24%
200 - 500 feet	34	43%	67	57%

Sites Lacking On-Site or Adjacent Sewer

Only 1 percent of the district acreage is on sites that lack on-site or adjacent access to public sewer collection lines.

Sites	% of All Sites	Acres	% of All Acres
5	6%	1	1%

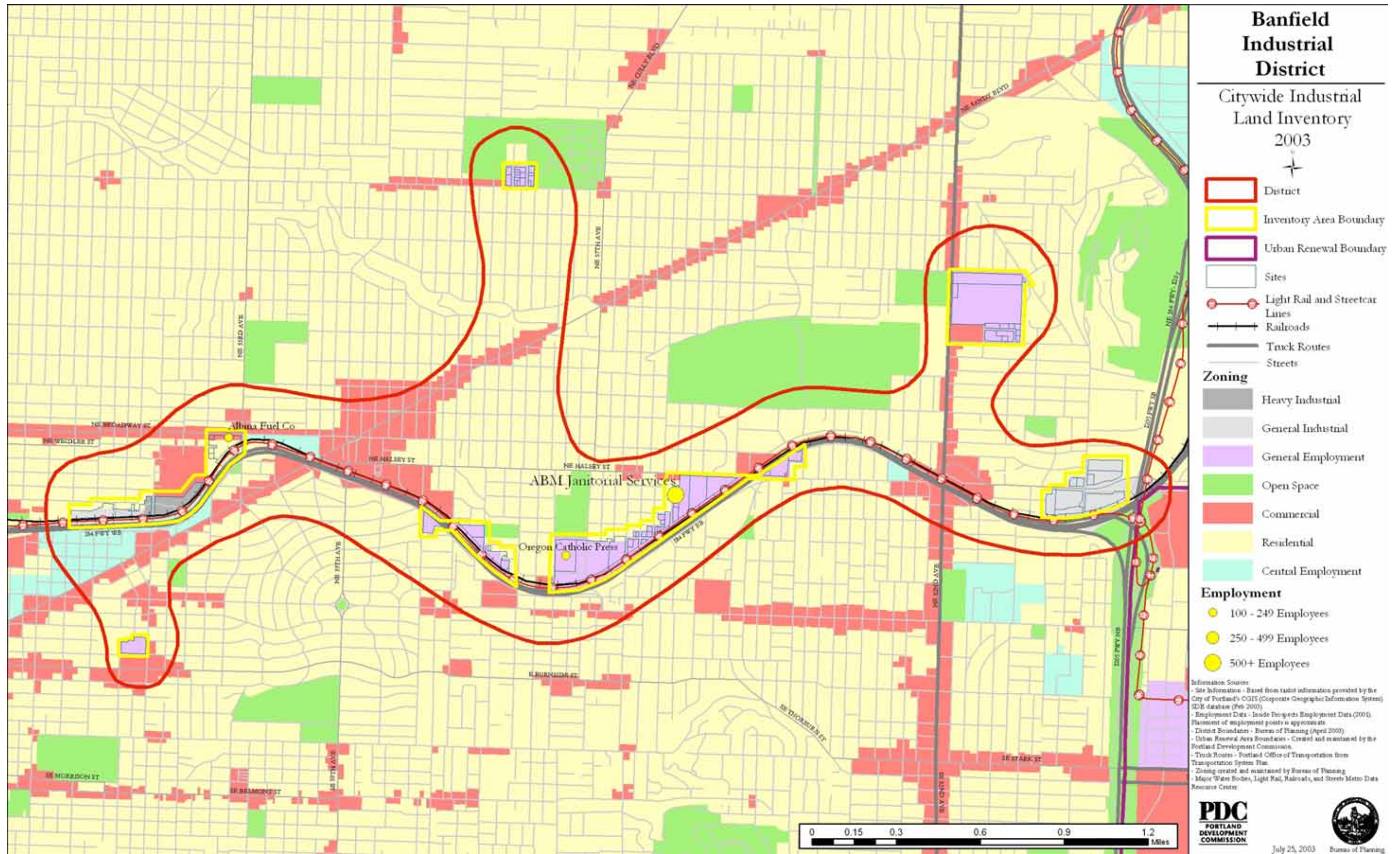
Environmental Site Cleanup or Investigation Projects

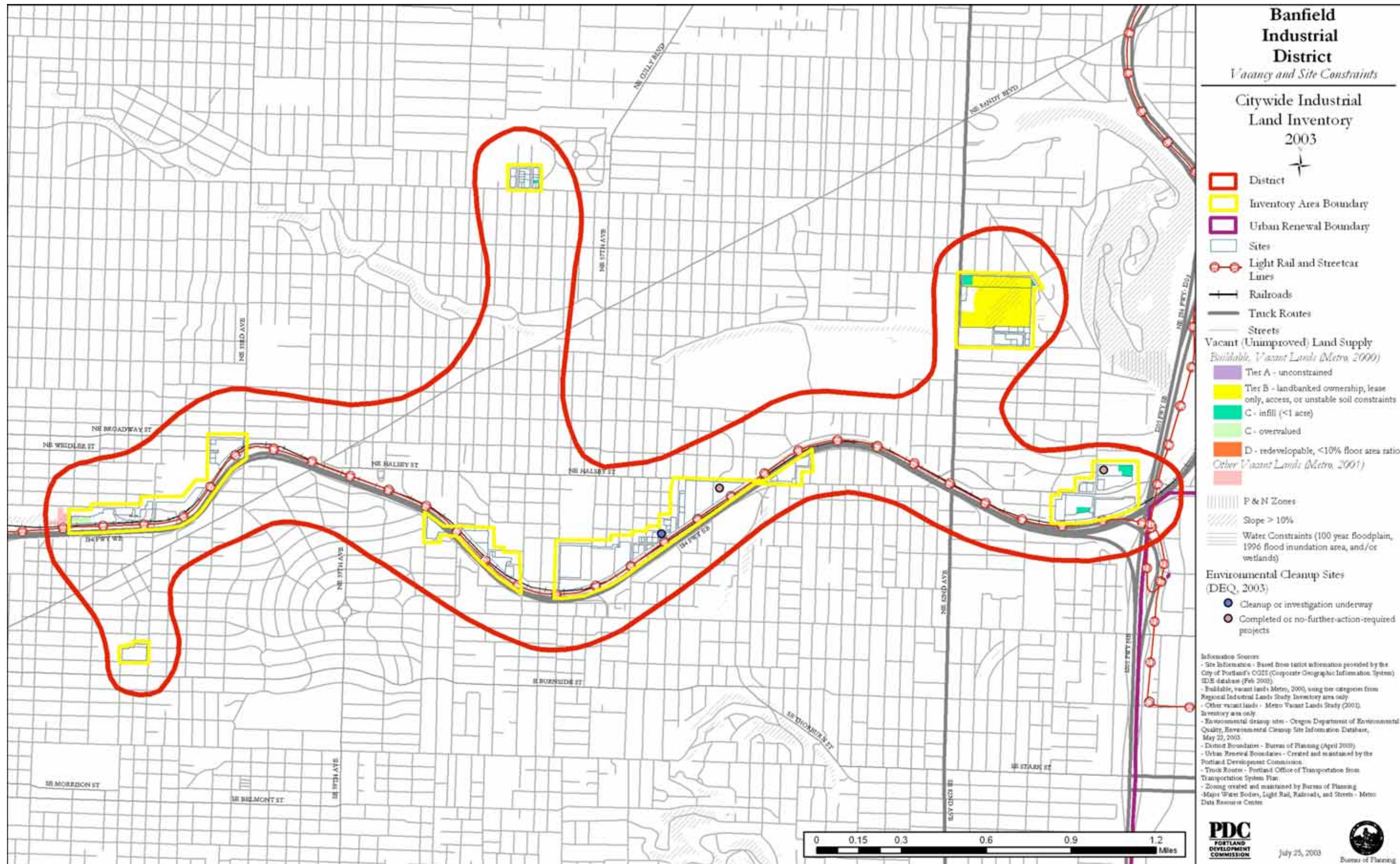
3 identified sites in the district have environmental cleanup or investigation projects underway.

2 identified sites in the district have completed cleanup projects or "no further action required" determinations

by DEQ, indicating that they pose no significant threat to human health or the environment.

Source: Oregon Department of Environmental Quality, Environmental Cleanup Site Information database, May 2003





C. Columbia Corridor East

The Columbia Corridor East district is the portion of the Columbia Corridor situated east of the I-205 Freeway.

- 1,731 acres in district
- 10% share of the acreage in all Portland industrial districts
- 393 sites (adjacent taxlots under single ownership)

Industry Mix

In the Columbia Corridor East district, an estimated 550 businesses employed 12,700 workers in 2000. Eighteen percent of the district's employment was in wholesale trade, 18 percent in services, and 15 percent in retail trade. The district has a high concentration of employment in fabricated metal products manufacturing, having an estimated 1,000 jobs among 21 firms that represent 10 percent of the metro area (Oregon portion) employment in that industry.

Largest 15 Industry Segments

Largest 15 Industry Segments	Firms & Jobs 2000				District Specialties		Yearly Pay per Worker	
	Firms	Jobs/ Firm	Jobs	Share of District Jobs	District Share of Metro Jobs	Location Quotient*	Average Pay, Multnomah County	Percent of Pay in All Industries
Wholesale Trade	161	14	2,322	18%	4%	2.45	\$43,884	119%
Services	104	22	2,243	18%	1%	0.62	\$33,500	91%
Retail Trade	60	32	1,947	15%	1%	0.87	\$20,869	57%
Construction	63	17	1,095	9%	2%	1.61	\$46,355	126%
Fabricated Metal Mfg.	21	48	1,007	8%	10%	6.40	\$35,503	96%
Trucking & Warehousing	25	30	762	6%	5%	3.30	\$38,115	104%
Industrial Machinery Mfg.	10	45	450	4%	3%	2.17	\$47,163	128%
Food Products Mfg.	5	69	346	3%	4%	2.91	\$36,320	99%
Transportation Services	26	13	327	3%	9%	5.78	\$35,338	96%
Printing & Publishing	11	22	239	2%	2%	1.53	\$42,480	115%
Communications & Utilities	7	28	194	2%	8%	5.24	\$33,547	91%
Furniture & Fixtures Mfg.	4	43	173	1%	7%	4.67	\$33,547	91%
Finance, Insurance, Real Estate	11	14	159	1%	0%	0.19	\$47,093	128%
Combined Others** (government; leather products mfg.)	3	337	1012	8%				
Combined Industrial Sectors	366	0	7,553	59%	0%	0.09	\$45,607	124%
All Industries	549	23	12,748	100%	2%	1.00	\$36,797	100%

* Share of the district's employment in this industry divided by the share of metro area (Clackamas, Columbia, Multnomah, Washington, Yamhill Counties) employment in the industry.

** Remainder of largest 15 industries are combined, because data on individual industries is suppressed.

Largest Employers

	Industry	Employment
Portland Habilitation Center	Job Training And Related Services	500+
Multnomah Education Service District	Elementary And Secondary Schools	500+
Leatherman Tool Group, Inc.	Hand And Edge Tools	500+
T R M Copy Centers Corp.	Office Equipment	250-499
Costco Wholesale Corp.	Department Stores	250-499
Corporate Express	Stationery And Office Supplies	250-499
Henkels & McCoy, Inc.	Water Sewer And Utility Lines	250-499
Atlas Copco Wagner, Inc.	Mining Machinery	250-499
Medical Management International	Offices Of Holding Companies	250-499

Source: Inside Prospects

Land Supply Characteristics

Site Size

Average site size in the district is 4.4 acres. Fifty-five percent of the district's acreage is in sites ranging from 3 – 19 acres in size, compared to an average 29 percent of the acreage in all districts.

	< 3 Acres	3 - 9 Acres	10 - 19 Acres	20 - 49 Acres	50 + Acres	Average Site Size
Sites	255	88	35	14	1	4.4
% of All Sites	65%	22%	9%	4%	0%	
Acres	270	473	488	410	90	
% of All Acres	16%	27%	28%	24%	5%	

Vacant Land

The Columbia Corridor East district contained 489 acres of vacant (unimproved), buildable industrial land in 2000 (Metro data), representing about 28 percent of the district's total acreage. Of that vacant land, 148 acres is rated as having no identified development constraints (Tier A), which is two thirds of the City's supply of Tier A land.

	Total Vacant 2001	Buildable Vacant Land 2000 (deducting Title 3 lands)						
		Tier A - no constraints	Tier B - unoccupied	Tier B - part occupied	Tier C - infill	Tier C - overvalued	Tier D - redevelop	Total Buildable
Sites	141	24	22	13	39	6	15	107
Vacant Acres	772	148	208	34	22	11	65	489
% of All Acres	44.6%	8.5%	12.0%	2.0%	1.3%	0.6%	3.8%	28.2%

Data source: Metro

Zoning

The *Portland Zoning Code* applies General Industrial (IG2) zoning to 87 percent of the acreage in the district.

	Heavy Industrial	General Industrial		Employment		Other
	IH	IG1	IG2	EG1	EG2	
Acres	0	0	1,498	0	232	1.0
% of All Acres	0%	0%	87%	0%	13%	0%

Assessed Property Value

The average assessed land value per square foot in the Columbia Corridor East district is \$3.63, compared to an average \$6.58 for all inventory districts. The average improvements-to-land-value ratio in the district is 193 percent.

	Total Value, All Sites (\$000)	Higher Valued Sites*		Average Value per Square Foot	Improvements to Land Value Ratio
		Sites	% of All Sites		
Land	\$273,697	32	0.8%	\$3.63	193%
Improvements	\$529,356	137	3.4%	\$7.02	
Total	\$803,055	104	2.6%	\$10.65	

* Sites in district with value per square foot at least 120% of the average in all districts.

Site Advantages

Transportation Access

Two thirds of the acreage in the district is on sites within one mile of a freeway on-ramp or off-ramp, and the entire district is within two miles. Rail access is potentially available to 17 percent of the district acreage on sites with on-site or adjacent to rail lines. All of the district is within one-half mile of a bus stop.

Miles from site	Major Truck Street				Freeway				Airport			
	Sites	% of All Sites	Acres	% of All Acres	Sites	% of All Sites	Acres	% of All Acres	Sites	% of All Sites	Acres	% of All Acres
< 1	289	74%	1008	58%	299	76%	1142	66%	0	0%	0	0%
1 to <2	104	26%	723.2	42%	94	24%	589.4	34%	29	7%	50.09	3%
2 to <5	0	0%	0	0%	0	0%	0	0%	338	86%	1315	76%
5 or more	0	0%	0	0%	0	0%	0	0%	26	7%	366.3	21%

	Railroad Access (Adjacent)				Harbor Access (Adjacent)				Bus Stop within 1/2 mile			
	Sites	% of All Sites	Acres	% of All Acres	Sites	% of All Sites	Acres	% of All Acres	Sites	% of All Sites	Acres	% of All Acres
	21	5%	293	17%	0	0%	0	0%	392	100%	1,729	100%

Access to Public Redevelopment Tools

Urban Renewal Area

Sites	% of		Acres	% of	
	All Sites	All Acres		All Sites	All Acres
261	66%		1,495	86%	

Enterprise Zone

Sites	% of	
	All Sites	All Acres
0	0%	

New Market Tax Credits

Sites	% of	
	All Sites	All Acres
3	1%	

Capital Improvements Plan (CIP) projects

Capital projects in the City of Portland CIP Database that will expand the district’s development capacity:

- Water main (WTR000127) - Install 196 feet of 16 inch diameter main. Site limits: bridge crossing over Columbia Slough at NE 138th Ave. Lead Project: WTR000266 ODOT Adjustments.

Development Constraints

Environmental Constraints

An estimated 31 percent of the district acreage is affected by environmental constraints within a composite layer developed for the inventory. The composite constraints layer consists of lands with floodplain, 10 percent or greater slopes, wetlands, and/or environmental protection (p or n) zones. Seventeen percent of the district acreage is in the Environmental Protection overlay zone, which generally precludes most development.

	Sites	% of All Sites	Acres	% of All Acres
Environmental Protection Zone (p)	119	30%	302	17%
Greenway Natural Zone (n)	0	0%	0	0%
100 Year Floodplain	129	33%	299	17%
Additional 1996 Flood Inundation Area	9	2%	42	2%
Title 3 Wetlands	28	7%	114	7%
10% or Greater Slope	222	56%	154	9%
Composite Constraints (all of above)	244	62%	535	31%
Goal 5 Significant Habitat Inventory	175	45%	520	30%

Proximity to Residential Zones

Ten percent of the district acreage is on sites within 500 feet of a residential zone, although virtually none is on sites within 200 feet. Proximity to housing poses potential constraints for industrial activities with off-site impacts.

Distance from site	Sites	% of All Sites	Acres	% of All Acres
Less than 200 feet	1	0.3%	0	0.01%
200 - 500 feet	49	12%	176	10%

Sites Lacking On-Site or Adjacent Sewer

Four percent of the district acreage is on sites that lack on-site or adjacent access to public sewer collection lines.

Sites	% of All Sites	Acres	% of All Acres
22	6%	74	4%

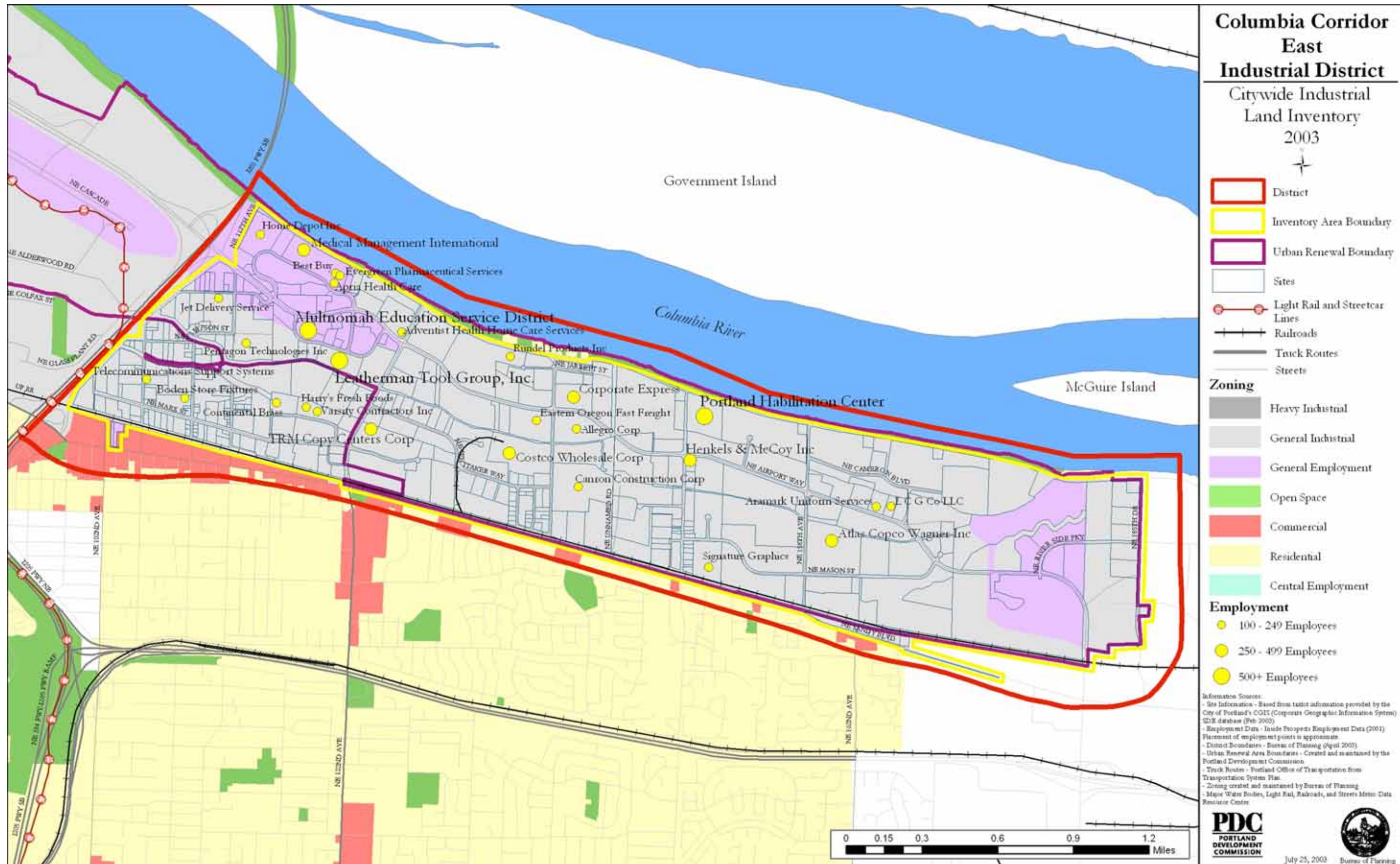
Environmental Site Cleanup or Investigation Projects

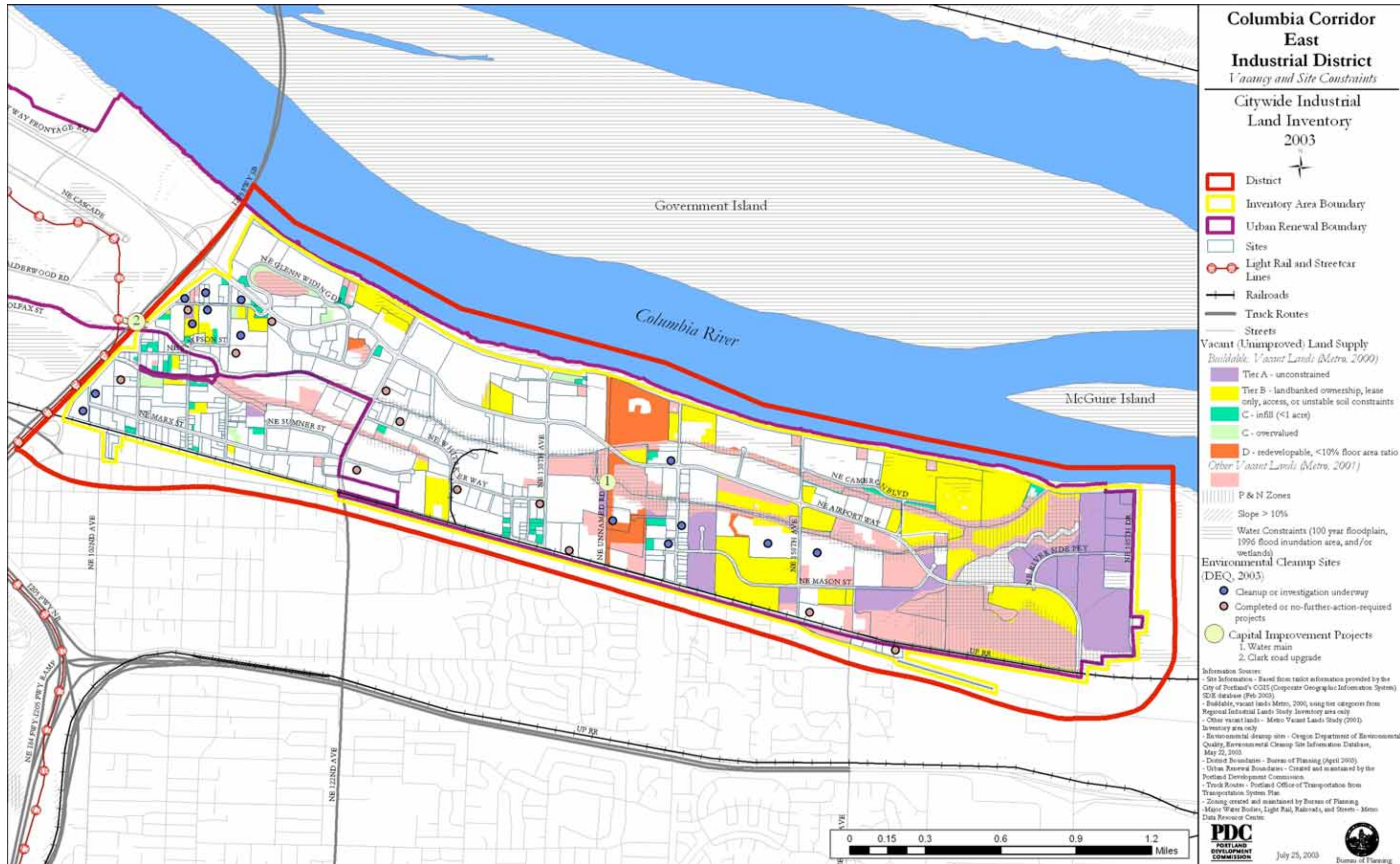
16 identified sites in the district have environmental cleanup or investigation projects underway.

11 identified sites in the district have completed cleanup projects or "no further action required" determinations

by DEQ, indicating that they pose no significant threat to human health or the environment.

Source: Oregon Department of Environmental Quality, Environmental Cleanup Site Information database, May 2003





D. Columbia Corridor West

The Columbia Corridor West district is the portion of the Columbia Corridor bounded by the I-5 Freeway on the east and the Burlington Northern Santa Fe Railroad cut on the west. It is situated between the Rivergate and Airport districts.

- 917 acres in district
- 6% share of acreage in all Portland industrial districts
- 149 sites (adjacent taxlots under single ownership)

Industry Mix

In the Columbia Corridor West district, an estimated 110 businesses employed about 2,200 workers in 2000. Thirty-seven percent of the district's employment was in wholesale trade, 14 percent in services, and 14 percent in wood products manufacturing.

Largest 15 Industry Segments

Largest 15 Industry Segments	Firms & Jobs 2000				District Specialties		Yearly Pay per Worker	
	Firms	Jobs/ Firm	Jobs	Share of District Jobs	District Share of Metro Jobs	Location Quotient*	Average Pay, Multnomah County	Percent of Pay in All Industries
Wholesale Trade	31	26	812	37%	1%	5.03	\$43,884	119%
Services	16	19	305	14%	0%	0.50	\$33,500	91%
Wood Products Mfg.	7	42	296	14%	4%	15.56	\$52,094	142%
Trucking & Warehousing	13	14	181	8%	1%	4.60	\$38,115	104%
Construction	10	8	84	4%	0%	0.72	\$46,355	126%
Finance, Insurance, Real Estate	5	5	27	1%	0%	0.19	\$47,093	128%
Transportation Equipment Mfg.	5	5	23	1%	1%	2.39	\$35,338	96%
Transportation Services	3	9	26	1%	0%	0.84	\$51,232	139%
Retail Trade	3	8	23	1%	0%	0.06	\$20,869	57%
Combined others**	7	49	345	16%				
(primary metals mfg., chemical products mfg., food products mfg., furniture & fixtures mfg., instruments mfg., petroleum products mfg.)								
Combined Industrial Sectors	85	21	1,812	83%	1%	2.48	\$45,607	124%
All Industries	111	20	2,173	100%	0%	1.00	\$36,797	100%

* Share of the district's employment in this industry divided by the share of metro area (Clackamas, Columbia, Multnomah, Washington, Yamhill Counties) employment in the industry.

Largest Employers

	Industry	Employment
Graphic Packaging Corp.	Packaging, Paper & Plastic Film Coated	250-499
Manheim's Portland Auto Auction	Automobiles And Other Motor Vehicles	100-249
Airgas, Inc.	Industrial Supplies	100-249
Familian Northwest, Inc.	Plumbing And Heating Supplies	100-249
L W O Corp.	Special Product Sawmills	100-249
American Linen	Power Laundries Family And Commercial	100-249
Rexam Image Products	Packaging, Paper & Plastic Film Coated	100-249

Source: Inside Prospects

Land Supply Characteristics

Site Size

Average site size in the Columbia Corridor West district is about 6 acres, compared to an average 4 acres for all districts. Forty-four percent of the district's acreage is in sites 50 acres or larger in size.

	< 3 Acres	3 - 9 Acres	10 - 19 Acres	20 - 49 Acres	50 + Acres	
Sites	101	27	11	5	5	Average Site Size
% of All Sites	68%	18%	7%	3%	3%	
Acreage	83	142	156	137	400	6.15
% of All Acres	9%	15%	17%	15%	44%	

Vacant Land

The Columbia Corridor West district contained only 21 acres of vacant (unimproved), buildable land in 2000 (Metro data), representing about 2 percent of the district's total acreage.

	Total Vacant 2001	Buildable Vacant Land 2000 (deducting Title 3 lands)						Total Buildable
		Tier A - no constraints	Tier B - unoccupied	Tier B - part Occupied	Tier C - infill	Tier C - overvalued	Tier D - redevelop	
Sites	55	0	3	1	21	4	1	29
Vacant Acres	275	0	4	2	10	3	1	21
% of All Acres	30.0%	0.0%	0.4%	0.2%	1.1%	0.3%	0.1%	2.3%

Data source: Metro

Zoning

The *Portland Zoning Code* applies Heavy Industrial (IH) zoning to 49 percent of the acreage in the district. Another 42 percent has General Industrial (IG2) zoning.

	Heavy Industrial	General Industrial		Employment		Other
	IH	IG1	IG2	EG1	EG2	
Acreage	452	0	389	0	10	66.00
% of All Acres	49%	0%	42%	0%	1%	7%

Assessed Property Value

The average assessed land value per square foot in the Columbia Corridor West district is \$1.98, compared to an average \$6.58 for all districts. Lower land values partially reflect that 69 percent of the district is floodplain. In contrast, the average assessed value of improvements per square foot in the district is \$11.27, compared to an average \$7.24 for all districts.

	Total Value, All Sites (\$000)	Higher Valued Sites*		Average Value per Square Foot	Improvements to Land Value Ratio
		Sites	% of All Sites		
Land	\$78,945	5	0.1%	\$1.98	<hr/> 570%
Improvements	\$450,003	24	0.6%	\$11.27	
Total	\$528,948	18	0.4%	\$13.24	

* Sites in district with value per square foot at least 120% of the average in all districts.

Site Advantages

Transportation Access

Seventy-nine percent of the acreage in the Columbia Corridor West district is on sites within a mile of a freeway on-ramp or off-ramp, and all of the district is within two miles. Ninety-one percent of the acreage in the district is on sites within 5 miles of the airport. Rail access is potentially available to 41 percent of the district acreage on sites with on-site or adjacent rail lines. Ninety-two percent of the district acreage is on sites within one-half mile of a bus stop.

Miles from site	Major Truck Street				Freeway				Airport			
	Sites	% of All Sites	Acres	% of All Acres	Sites	% of All Sites	Acres	% of All Acres	Sites	% of All Sites	Acres	% of All Acres
< 1	144	97%	894	97%	110	74%	729	79%	0	0%	0	0%
1 to <2	5	3%	23	3%	39	26%	188	21%	0	0%	0	0%
2 to <5	0	0%	0	0%	0	0%	0	0%	38	26%	80	9%
5 or more	0	0%	0	0%	0	0%	0	0%	111	74%	837	91%

Railroad Access (Adjacent)				Harbor Access (Adjacent)				Bus Stop within 1/2 mile			
Sites	% of All Sites	Acres	% of All Acres	Sites	% of All Sites	Acres	% of All Acres	Sites	% of All Sites	Acres	% of All Acres
47	32%	378	41%	0	0%	0	0%	139	93%	840	92%

Access to Public Redevelopment Tools

Urban Renewal Area

Sites	% of		Acres	% of	
	All Sites	All Acres		All Sites	All Acres
98	66%		230	25%	

Enterprise Zone

Sites	% of	
	All Sites	All Acres
138	93%	

New Market Tax Credits

Sites	% of	
	All Sites	All Acres
31	21%	

Capital Improvements Plan (CIP) projects

Capital projects in the City of Portland CIP Database that will expand the district's development capacity:

- Water main and hydrants (WTR000365 and WTR000381) - Approximately 12 miles of new and replacement mains are installed annually to support ongoing expansion, rehabilitation and replacement of the water

distribution piping system and related appurtenances. The Water Bureau accomplishes these activities through implementation of several sub-projects. Projects include main replacement, new mains (supply & development), new hydrants, bridge mains, regulators, and others. NOTE: WTR000365 - NE 185th Mains and WTR000381 - N Denver & Columbia Blvd.

Development Constraints

Environmental Constraints

Sixty-nine percent of the district acreage is in the floodplain. Nearly three fourths of the district is affected by environmental constraints within a composite layer developed for the inventory, consisting of lands with floodplain, 10 percent or greater slopes, wetlands, and/or environmental protection (p or n) zones.

	Sites	% of All Sites	Acres	% of All Acres
Environmental Protection Zone (p)	7	5%	42	5%
Greenway Natural Zone (n)	0	0%	0	0%
100 Year Floodplain	73	49%	627	68%
Additional 1996 Flood Inundation Area	11	7%	11	1%
Title 3 Wetlands	16	11%	98	11%
10% or Greater Slope	110	74%	100	11%
Composite Constraints (all of above)	130	87%	681	74%
Goal 5 Significant Habitat Inventory	80	54%	504	55%

Proximity to Residential Zones

Sixteen percent of the district acreage is on sites within 500 feet of a residential zone, and 1 percent is on sites within 200 feet, posing potential constraints for industrial activities with off-site impacts.

Distance from site	Sites	% of All Sites	Acres	% of All Acres
Less than 200 feet	16	11%	7	1%
200 - 500 feet	56	38%	136	15%

Sites Lacking On-Site or Adjacent Sewer

Five percent of the district acreage is on sites that lack on-site or adjacent access to public sewer collection lines.

Sites	% of All Sites	Acres	% of All Acres
19	13%	46	5%

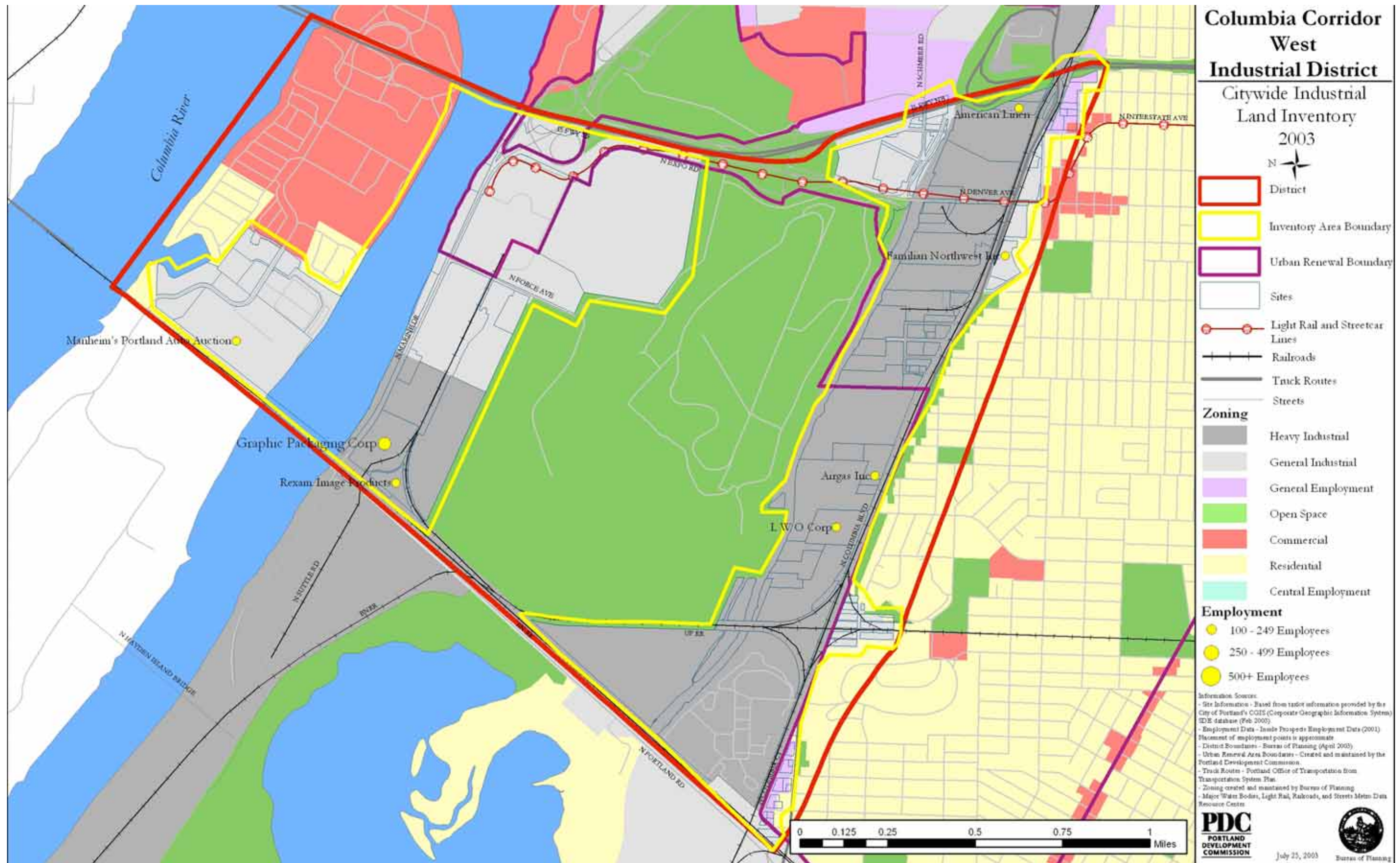
Environmental Site Cleanup or Investigation Projects

20 identified sites in the district have environmental cleanup or investigation projects underway.

3 identified sites in the district have completed cleanup projects or "no further action required" determinations

by DEQ, indicating that they pose no significant threat to human health or the environment.

Source: Oregon Department of Environmental Quality, Environmental Cleanup Site Information database, May 2003



Columbia Corridor West Industrial District

Citywide Industrial Land Inventory 2003

N

- District
- Inventory Area Boundary
- Urban Renewal Boundary
- Sites
- Light Rail and Streetcar Lines
- Railroads
- Truck Routes
- Streets

Zoning

- Heavy Industrial
- General Industrial
- General Employment
- Open Space
- Commercial
- Residential
- Central Employment

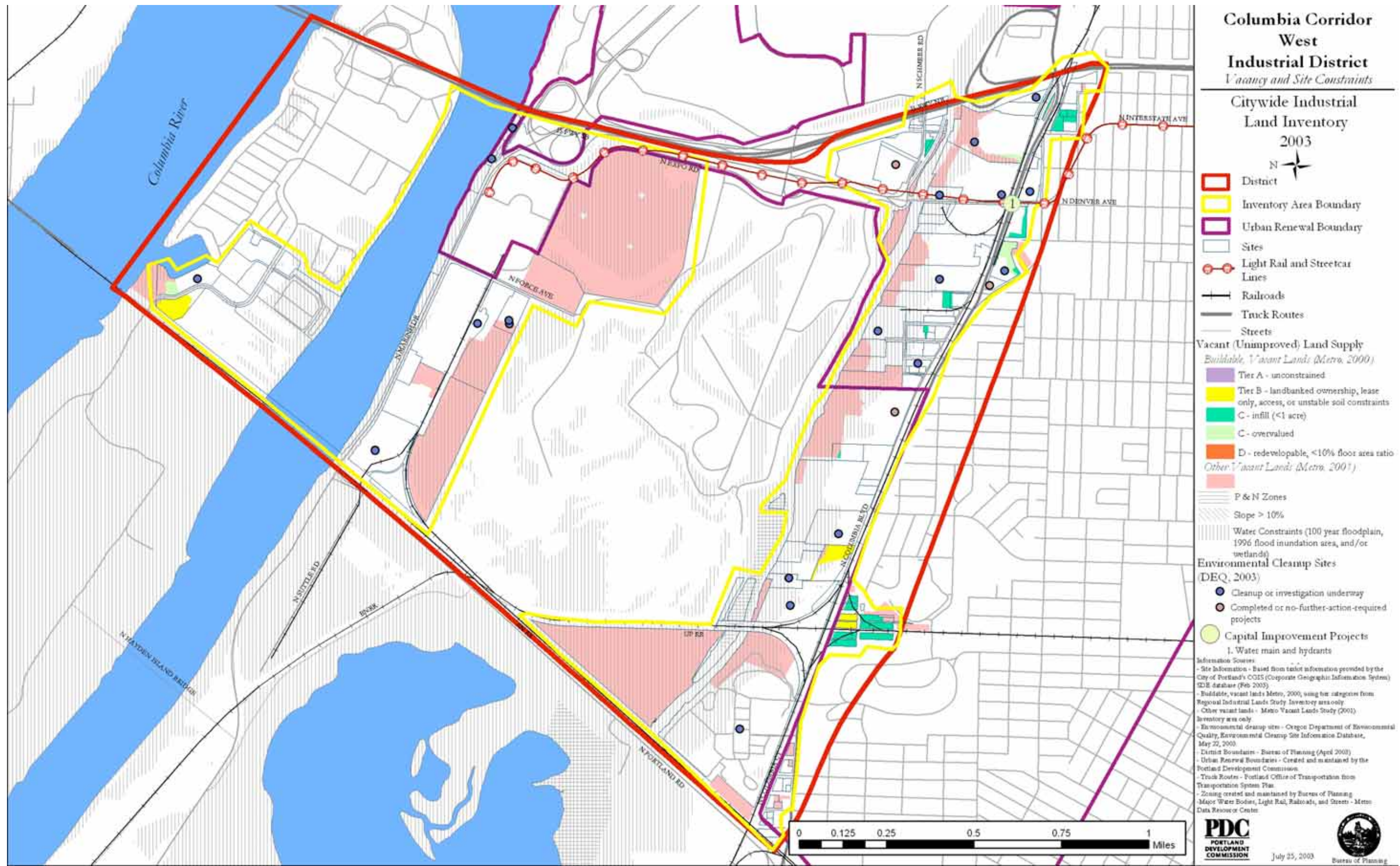
Employment

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

Information Sources:
 - Site Information - Based from taxlot information provided by the City of Portland's CGIS (Corporate Geographic Information System) IDE database (Feb 2003)
 - Employment Data - Inside Prospects Employment Data (2001)
 - Placement of employment points is approximate
 - District Boundaries - Bureau of Planning (April 2003)
 - Urban Renewal Area Boundaries - Created and maintained by the Portland Development Commission
 - Truck Routes - Portland Office of Transportation from Transportation System Plan
 - Zoning created and maintained by Bureau of Planning
 - Major Water Bodies, Light Rail, Railroads, and Streets Metro Data Resource Center

PDC
 PORTLAND
 DEVELOPMENT
 COMMISSION

July 25, 2003



E. Inner Eastside

The Inner Eastside district consists of the Central Eastside and Brooklyn industrial areas.

- 633 acres in district
- 4% share of the acreage in all Portland industrial districts
- 890 sites (adjacent taxlots under single ownership)

Industry Mix

In the Inner Eastside district, an estimated 770 businesses employed 19,700 workers in 2000. Two thirds of those jobs were in the industrial sectors, including 20 percent of district employment in wholesale trade and 10 percent in construction. Industrial specialties of the Inner Eastside include transit, stone/glass/clay/concrete products, paper products manufacturing, and apparel manufacturing, each of which have relatively high concentrations of their metro area employment in the Inner Eastside.

Largest 15 Industry Segments	Firms & Jobs 2000				District Specialties		Yearly Pay per Worker	
	Firms	Jobs/ Firm	Jobs	Share of District Jobs	District Share of Metro Jobs	Location Quotient*	Average Pay, Multnomah County	Percent of Pay in All Industries
Wholesale Trade	215	18	3,911	20%	6%	2.67	\$43,884	119%
Services	196	17	3,360	17%	1%	0.60	\$33,500	91%
Retail Trade	89	33	2,901	15%	2%	0.84	\$20,869	57%
Construction	71	29	2,026	10%	4%	1.92	\$46,355	126%
Food Products Mfg.	7	77	541	3%	7%	2.94	\$36,320	99%
Communication & Utilities	6	86	518	3%	4%	1.59	\$81,345	221%
Fabricated Metal Products	17	25	432	2%	4%	1.77	\$35,503	96%
Stone, Clay & Glass Products	7	61	429	2%	13%	5.70	\$39,019	106%
Transportation Equipment Mfg.	6	71	425	2%	4%	1.51	\$51,232	139%
Printing & Publishing	32	13	405	2%	4%	1.68	\$42,480	115%
Industrial Machinery Mfg.	17	19	324	2%	2%	1.01	\$47,163	128%
Apparel & Textiles Mfg.	11	26	286	1%	12%	5.20	\$27,979	76%
Finance, Insurance, Real Estate	24	11	264	1%	0%	0.21	\$33,547	91%
Combined others**	13	229	2,972	15%				
(Local & Interurban Transit; Paper Products Mfg.)								
Combined Industrial Sectors	453	29	13,130	67%	5%	1.98	\$45,607	124%
All Industries	774	25	19,723	100%	2%	1.00	\$36,797	100%

* Share of the district's employment in this industry divided by the share of metro area (Clackamas, Columbia, Multnomah, Washington, Yamhill Counties) employment in the industry.

** Remainder of largest 15 industries are combined, because data on individual industries is suppressed.

Sources: Bureau of Planning calculations from Oregon Employment Department and U.S. Bureau of Labor Statistics data on "covered employment."

Largest Employers

	Industry	Employment
Tri-Met Transportation	Local And Suburban Transit	500+
Goodwill Industries	Social Services	500+
Fred Meyer Stores, Inc.	Grocery Stores	500+
North Pacific Trading	Commodity Contracts Brokers Dealers	500+
Oregon Museum of Science & Industry	Museums And Art Galleries	250-499
Oregon Electric Group	Electrical Work	250-499
Janis Youth Program	Residential Care	250-499
Franz Bakery	Bread And Other Bakery Products	250-499
PECO Manufacturing Co., Inc.	Plastic Products	250-499
American Medical Response-NW Region	Local Passenger Transportation	250-499
Pacific Coast Fruit Co.	Fresh Fruits And Vegetables	250-499

Source: Inside Prospects

Land Supply Characteristics

Site Size

Average site size in the Inner Eastside district is about 0.7 acres, compared to 4 acres for all districts. An estimated 62 percent of the district's acreage is in sites less than 3 acres in size, compared to an average 14 percent of the acreage in all districts.

	< 3 Acres	3 - 9 Acres	10 - 19 Acres	20 - 49 Acres	50 + Acres	
Sites	868	17	2	2	1	Average
% of All Sites	98%	2%	0%	0%	0%	Site Size
Acres	392	92	22	74	54	0.71
% of All Acres	62%	15%	3%	12%	9%	

Vacant Land

The Inner Eastside district contained only 17 acres of vacant (unimproved) land in 2000 (Metro data), representing about 3 percent of the district's total acreage.

	Total Vacant 2001	Buildable Vacant Land 2000 (deducting Title 3 lands)						Total Buildable
		Tier A - no constraints	Tier B - unoccupied	Tier B - part occupied	Tier C - infill	Tier C - overvalued	Tier D - redevelop	
Sites	31	0	0	2	18	4	9	28
Vacant Acres	17	0	0	3	5	4	5	17
% of All Acres	2.7%	0.0%	0.0%	0.5%	0.8%	0.6%	0.8%	2.7%

Data source: Metro

Zoning

The *Portland Zoning Code* applies General Industrial (IG1) zoning to 84 percent of the inventory acreage in Inner Eastside district. The lands along the Grand, Martin Luther King, and some other major corridors in the Central Eastside have Central Employment (EX) zoning and thus are not included in the inventory area.

	Heavy Industrial	General Industrial		Employment		Other
	IH	IG1	IG2	EG1	EG2	
Acres	19	530	0	31	39	14
% of All Acres	3%	84%	0%	5%	6%	2%

Assessed Property Value

The average assessed land value per square foot in the Inner Eastside district is \$8.81, compared to the average \$6.58 in all districts. The average assessed value of property improvements per square foot is \$20.15, compared to the average \$7.24 in all districts. The average improvements-to-land-value ratio in the district is 229 percent.

	Total Value, All Sites (\$000)	Higher Valued Sites*		Average Value per Square Foot	Improvements to Land Value Ratio
		Sites	% of All Sites		
Land	\$242,979	796	19.8%	\$8.81	229%
Improvements	\$555,479	659	16.4%	\$20.15	
Total	\$798,457	739	18.4%	\$28.96	

* Sites in district with value per square foot at least 120% of the average in all districts.

Site Advantages

Transportation Access

Virtually all of the acreage in the district is within two miles of a freeway on-ramp or off-ramp, and 54 percent is on sites within one mile. Rail access is potentially available to 44 percent of the Inner Eastside district acreage on sites with on-site or adjacent to rail lines, although much of that acreage consists of the Brooklyn rail yard, a central feature of the Brooklyn industrial area. The entire district is within one-half mile of a bus stop.

Miles from site	Major Truck Street				Freeway				Airport			
	% of Sites		% of Acres		% of Sites		% of Acres		% of Sites		% of Acres	
< 1	890	100%	633	100%	621	70%	342	54%	0	0%	0	0%
1 to <2	0	0%	0	0%	268	30%	291	46%	0	0%	0	0%
2 to <5	0	0%	0	0%	1	0%	0.3	0.05%	0	0%	0	0%
5 or more	0	0%	0	0%	0	0%	0	0%	890	100%	633	100%

Railroad Access (Adjacent)				Harbor Access (Adjacent)				Bus Stop within 1/2 mile			
% of Sites		% of Acres		% of Sites		% of Acres		% of Sites		% of Acres	
141	16%	277	44%	3	0.34%	7	1%	890	100%	633	100%

Access to Public Redevelopment Tools

Urban Renewal Area

_____ % of | _____ % of

Enterprise Zone

_____ % of

New Market Tax Credits

_____ % of

Sites	All Sites	Acres	All Acres	Sites	All Sites	Sites	All Sites
610	69%	312	49%	0	0%	428	48%

Capital Improvements Program (CIP) projects

No capital projects in the City of Portland CIP Database were identified that will expand this specific district's development capacity.

Development Constraints

Environmental Constraints

An estimated 8 percent of the district acreage is on slopes of 10 percent or steeper. Eleven percent of the district acreage is affected by environmental constraints within a composite layer developed for the inventory, consisting of lands with floodplain, 10 percent or greater slopes, wetlands, and/or environmental protection (p or n) zones.

	Sites	% of All Sites	Acres	% of All Acres
Environmental Protection Zone (p)	3	0%	0.4	0.1%
Greenway Natural Zone (n)	11	1%	14	2%
100 Year Floodplain	29	3%	16	3%
1996 Flood Inundation Area	41	5%	19	3%
Title 3 Wetlands	0	0%	0	0%
10% or Greater Slope	129	14%	53	8%
Composite Constraints (all of above)	155	17%	70	11%
Goal 5 Significant Habitat Inventory	53	6%	39	6%

Proximity to Residential Zones

One-third of the district acreage is on sites within 500 feet of a residential zone, and 4 percent is on sites within 200 feet, posing potential constraints for industrial activities with off-site impacts.

Distance from site	Sites	% of All Sites	Acres	% of All Acres
Less than 200 feet	70	8%	23	4%
200 - 500 feet	230	26%	182	29%

Sites Lacking On-Site or Adjacent Sewer

Two percent of the district acreage is on sites that lack on-site or adjacent access to public sewer collection lines.

Sites	% of All Sites	Acres	% of All Acres
34	4%	14	2%

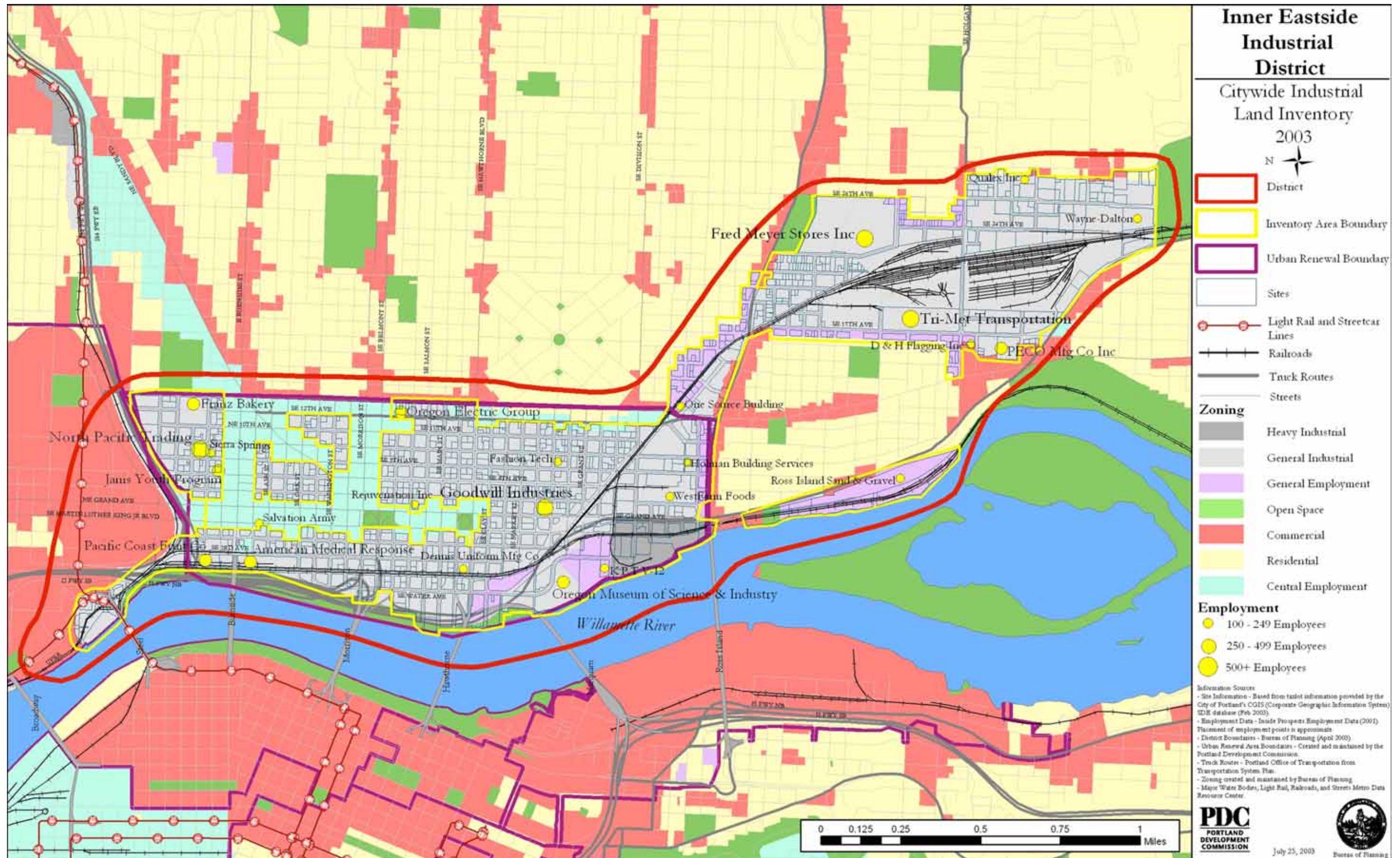
Environmental Site Cleanup or Investigation Projects

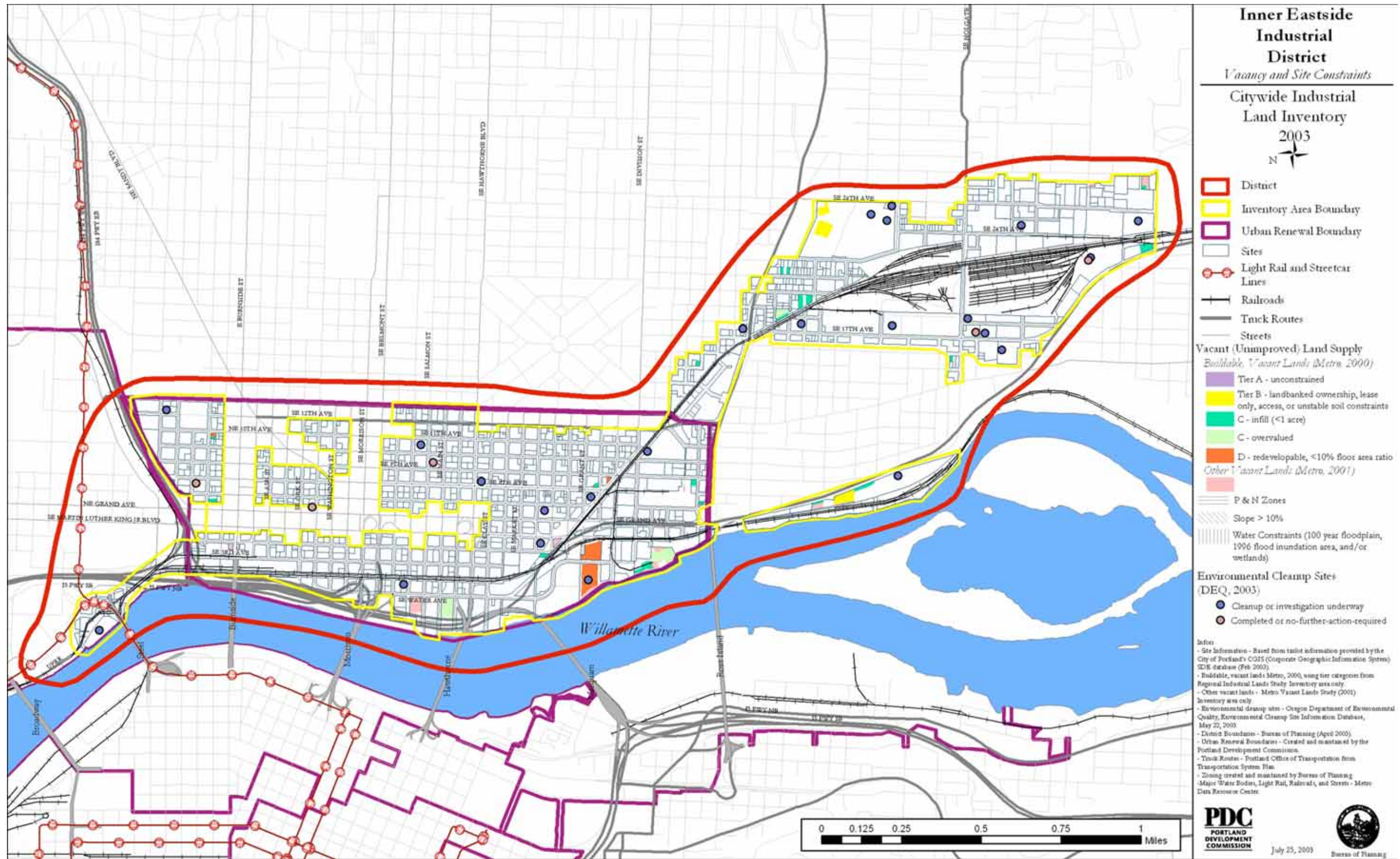
24 identified sites in the district have environmental cleanup or investigation projects underway.

5 identified sites in the district have completed cleanup projects or "no further action required" determinations

by DEQ, indicating that they pose no significant threat to human health or the environment.

Source: Oregon Department of Environmental Quality, Environmental Cleanup Site Information database, May 2003





F. Northwest Industrial

The Northwest Industrial district consists of the Guild's Lake and Linnton industrial areas. It is the portion of the Portland Harbor industrial area on the west side of the Willamette River.

- 1,759 acres in district
- 11% share of the acreage in all Portland industrial districts
- 605 sites (adjacent taxlots under single ownership)

Industry Mix

An estimated 550 businesses employed 17,700 workers in the Northwest Industrial district in 2000. Eighty-five percent of those jobs were in the industrial sectors, including 18 percent of district employment in wholesale trade and 10 percent in construction. Industrial specialties of the district, which have high concentrations of the industry's employment in the region, include electronics manufacturing, transportation equipment manufacturing, printing and publishing, primary metals manufacturing, and water transportation.

Largest 15 Industry Segments

Largest 15 Industry Segments	Firms & Jobs 2000				District Specialties		Yearly Pay per Worker	
	Firms	Jobs/ Firm	Jobs	Share of District Jobs	District Share of Metro Jobs	Location Quotient*	Average Pay, Multnomah County	Percent of Pay in All Industries
Wholesale Trade	166	20	3,241	18%	5%	2.47	\$43,884	119%
Construction	33	52	1,724	10%	4%	1.83	\$46,355	126%
Services	87	18	1,575	9%	1%	0.32	\$33,500	91%
Printing & Publishing	31	38	1,185	7%	11%	5.48	\$42,480	115%
Trucking & Warehousing	38	24	927	5%	6%	2.90	\$38,115	104%
Water Transportation	7	130	909	5%	41%	19.66	\$52,121	142%
Industrial Machinery Mfg.	27	29	772	4%	6%	2.69	\$47,163	128%
Retail Trade	45	13	577	3%	0%	0.19	\$20,869	57%
Fabricated Metal Products	20	24	487	3%	5%	2.23	\$35,503	96%
Finance, Insurance, Real Estate	25	16	388	2%	1%	0.34	\$47,093	128%
Combined others**	12	345	4,139	23%				
(Electronics Mfg.; Transportation Equipment Mfg.; Primary Metals Mfg.)								
Combined Industrial Sectors	395	38	15,081	85%	5%	2.54	\$45,607	124%
All Industries	555	32	17,659	100%	2%	1.00	\$36,797	100%

* Share of the district's employment in this industry divided by the share of metro area (Clackamas, Columbia, Multnomah, Washington, Yamhill Counties) employment in the industry.

** Remainder of largest 15 industries are combined, because data on individual industries is suppressed.

Sources: Bureau of Planning calculations from Oregon Employment Department and U.S. Bureau of Labor Statistics data on "covered employment."

Largest Employers

	Industry	Employment
Wacker Siltronic Corp.	Semiconductors And Related Devices	500+
Gunderson, Inc.	Gray Iron Foundries	500+
Christenson Electric	Electrical Work	500+
Sulzer Pumps, Inc.	Gray Iron Foundries	500+
Esco Corporation	Steel Foundries	500+

Source: Inside Prospects

Land Supply Characteristics

Site Size

Average site size in the Northwest Industrial district is about 3 acres, compared to 4 acres for all of the inventory districts. The district's acreage is relatively evenly spread among sites in different size ranges, comparable to the average of all districts.

	< 3 Acres	3 - 9 Acres	10 - 19 Acres	20 - 49 Acres	50 + Acres	
Sites	505	64	18	14	4	Average
% of All Sites	83%	11%	3%	2%	1%	Site Size
Acres	385	355	263	403	353	2.91
% of All Acres	22%	20%	15%	23%	20%	

Vacant Land

The district contained an estimated 182 acres of vacant (unimproved), buildable industrial land in 2000 (Metro data), representing about 10 percent of the district's total acreage. Of that vacant land, only 3 acres is rated as having no identified development constraints (Tier A).

	Total Vacant 2001	Buildable Vacant Land 2000 (deducting Title 3 lands)						Total Buildable
		Tier A - no constraints	Tier B - unoccupied	Tier B - part occupied	Tier C - infill	Tier C - overvalued	Tier D - redevelop	
Sites	104	2	9	8	57	14	17	90
Acres	316	3	34	83	27	26	9	182
Vacancy Rate	18.0%	0.2%	1.9%	4.7%	1.5%	1.5%	0.5%	10.3%

Data source: Metro

Zoning

The *Portland Zoning Code* applies Heavy Industrial (IH) zoning to 91 percent of the acreage in the district.

	Heavy Industrial	General Industrial		Employment		Other
	IH	IG1	IG2	EG1	EG2	
Acres	1,609	101	0	6	0	43
% of All Acres	91%	6%	0%	0.3%	0%	2%

Assessed Property Value

The average assessed land value per square foot in the Northwest Industrial district is \$4.75, compared to an average \$6.58 among all districts. The average improvements-to-land-value ratio in the district is relatively high at 229 percent.

	Total Value, All Sites (\$000)	Higher Valued Sites*		Average Value per Square Foot	Improvements to Land Value Ratio
		Sites	% of All Sites		
Land	\$364,194	333	8.3%	\$4.75	<hr/> 229%
Improvements	\$833,587	297	7.4%	\$10.88	
Total	\$1,197,781	333	8.3%	\$15.63	

* Sites in district with value per square foot at least 120% of the average in all districts.

Site Advantages

Transportation Access

Fifty-four percent of the acreage in the district is on sites within two miles of a freeway on-ramp or off-ramp, and 99 percent is on sites within one mile of a Regional or Major Truck Street. Rail access is potentially available to 62 percent of the district acreage on sites with on-site or adjacent to rail lines. The Lake Yard, operated by Burlington Northern Santa Fe Railroad, is a prominent feature in the district. Maritime access to Portland Harbor is potentially available to 52 percent of the district acreage on sites between the river and the nearest street or railroad right-of-way. All sites in the district are within one-half mile of a bus stop.

Miles From site	Major Truck Street				Freeway				Airport			
	Sites	% of All Sites	Acres	% of All Acres	Sites	% of All Sites	Acres	% of All Acres	Sites	% of All Sites	Acres	% of All Acres
< 1	587	97%	1,744	99%	364	60%	566	32%	0	0%	0	0%
1 to <2	18	3%	15	1%	82	14%	395	22%	0	0%	0	0%
2 to <5	0	0%	0	0%	137	23%	654	37%	0	0%	0	0%
5 or more	0	0%	0	0%	22	4%	144	8%	605	100%	1759	100%

Railroad Access (Adjacent)				Harbor Access (Adjacent)				Bus Stop within 1/2 mile			
Sites	% of All Sites	Acres	% of All Acres	Sites	% of All Sites	Acres	% of All Acres	Sites	% of All Sites	Acres	% of All Acres
230	38%	1,098	62%	87	14%	913	52%	605	100%	1,759	100%

Access to Public Redevelopment Tools

Urban Renewal Area

Sites	% of		Acres	% of	
	All Sites	All Acres		All Sites	All Acres
16	3%		12	0.7%	

Enterprise Zone

% of	
Sites	All Sites
276	46%

New Market Tax Credits

% of	
Sites	All Sites
58	10%

Capital Improvements Program (CIP) projects

No capital projects in the City of Portland CIP Database were identified that will expand this specific district's development capacity.

Development Constraints

Environmental Constraints

An estimated 21 percent of the district acreage is affected by environmental constraints within a composite layer developed for the inventory, consisting of lands with floodplain, 10 percent or greater slopes, wetlands, and/or environmental protection (p or n) zones. Twelve percent of the district acreage is affected by slope of 10 percent or more and 11 percent by floodplain.

	Sites	% of All Sites	Acres	% of All Acres
Environmental Protection Zone (p)	4	1%	16	1%
Greenway Natural Zone (n)	1	0%	24	1%
100 Year Floodplain	42	7%	150	9%
1996 Flood Inundation Area	15	2%	39	2%
Title 3 Wetlands	3	0%	39	2%
10% or Greater Slope	237	39%	204	12%
Composite Constraints (all of above)	238	39%	363	21%
Goal 5 Significant Habitat Inventory	113	19%	285	16%

Proximity to Residential Zones

Ten percent of the district acreage is on sites within 500 feet of a residential zone, and 1 percent is on sites within 200 feet, posing potential constraints for industrial activities with off-site impacts.

Distance from site	Sites	% of All Sites	Acres	% of All Acres
Less than 200 feet	29	5%	9	1%
200 - 500 feet	136	22%	161	9%

Sites Lacking On-Site or Adjacent Sewer

Only 1 percent of the district acreage is on sites that lack on-site or adjacent access to public sewer collection lines.

Sites	% of All Sites	Acres	% of All Acres
39	6%	19	1%

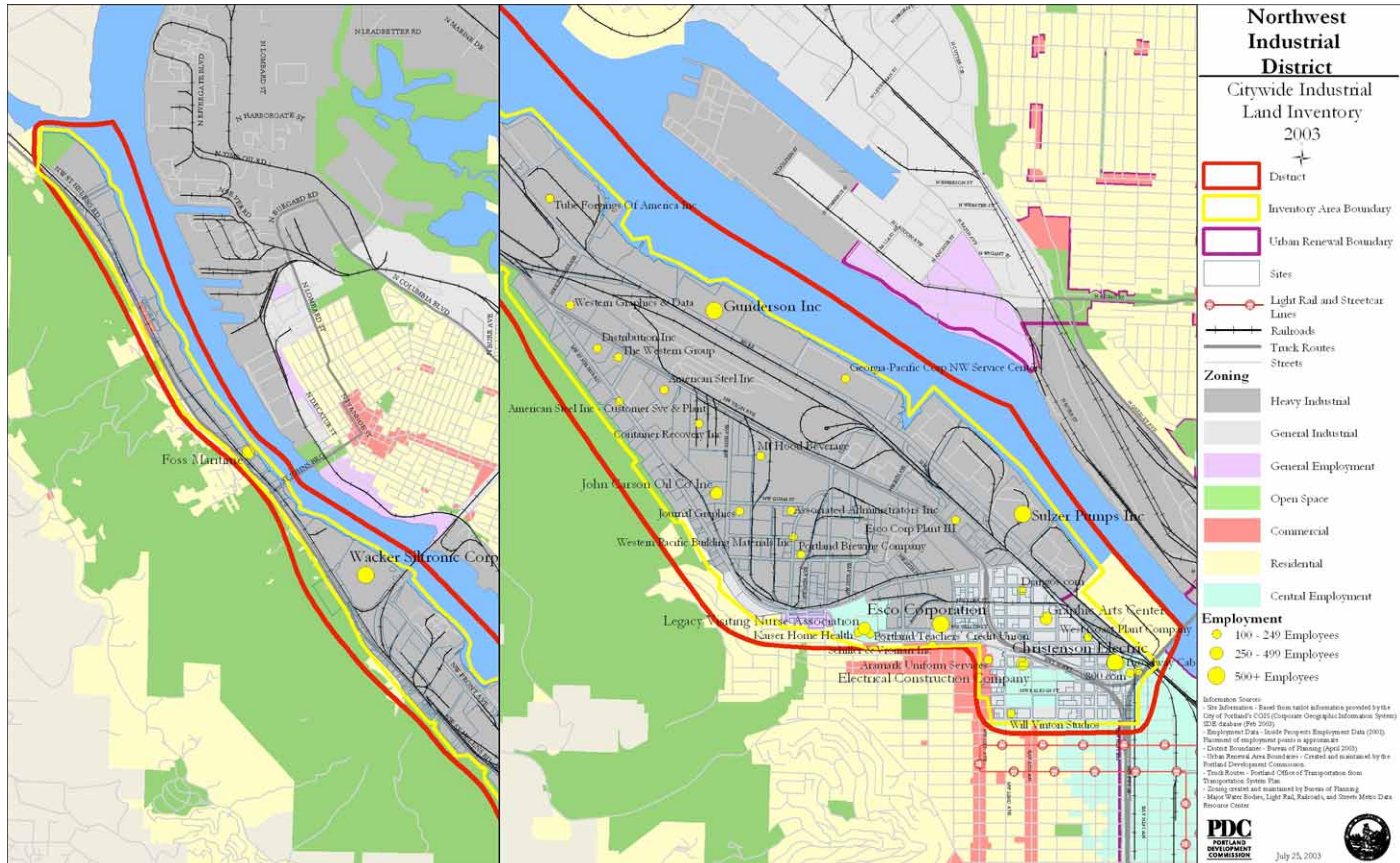
Environmental Site Cleanup or Investigation Projects

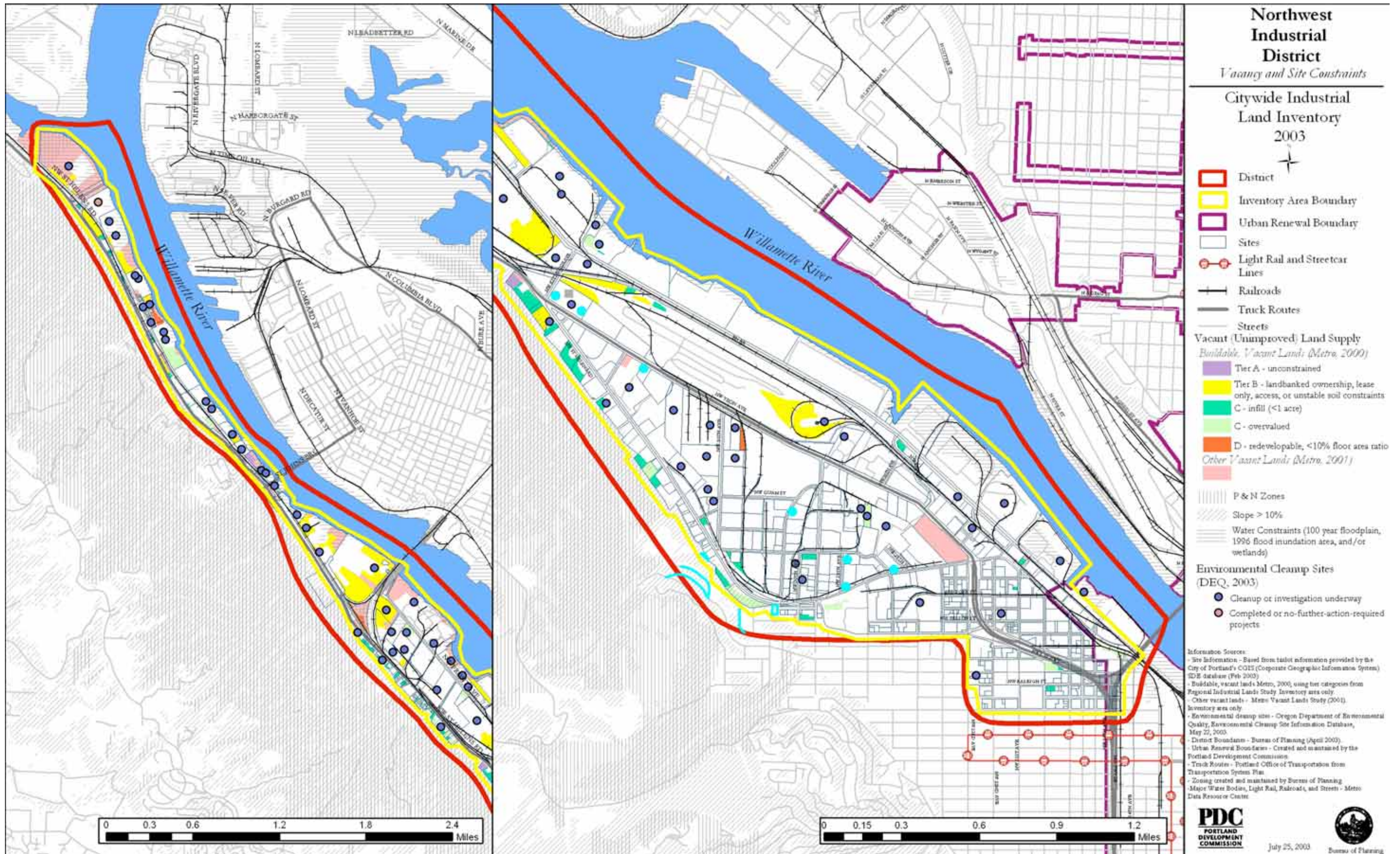
43 identified sites in the district have environmental cleanup or investigation projects underway.

3 identified sites in the district have completed cleanup projects or "no further action required" determinations

by DEQ, indicating that they pose no significant threat to human health or the environment.

Source: Oregon Department of Environmental Quality, Environmental Cleanup Site Information database, May 2003





G. Outer Southeast

The Outer Southeast district is the group of small industrial areas along the southern city border, in Lents, and along the I-205 Freeway.

- 472 acres in district
- 3% share of the acreage in all Portland industrial districts
- 303 sites (adjacent taxlots under single ownership)

Industry Mix

In the Outer Southeast district, an estimated 190 businesses employed 3,850 workers in 2000. Seventy-two percent of those jobs were in the industrial sectors. Services accounted for 17 percent, and retail trade 10 percent, of the district's employment. The district also has a high concentration of the metro area employment in primary metals manufacturing.

Largest 15 Industry Segments

Largest 15 Industry Segments	Firms & Jobs 2000				District Specialties		Yearly Pay per Worker	
	Firms	Jobs/ Firm	Jobs	Share of District Jobs	District Share of Metro Jobs	Location Quotient*	Average Pay, Multnomah County	Percent of Pay in All Industries
Services	41	16	671	17%	0%	0.62	\$33,500	91%
Retail Trade	37	10	368	10%	0%	0.55	\$20,869	57%
Wholesale Trade	26	10	257	7%	0%	0.90	\$43,884	119%
Construction	21	12	251	7%	1%	1.22	\$46,355	126%
Communication & Utilities	6	34	203	5%	1%	3.20	\$81,345	221%
Fabricated Metal Products	12	17	200	5%	2%	4.21	\$35,503	96%
Furniture & Fixtures	2	88	175	5%	7%	15.65	\$33,547	91%
Industrial Machinery Mfg.	5	34	169	4%	1%	2.71	\$47,163	128%
Wood Products Mfg.	3	24	71	2%	1%	2.11	\$52,094	142%
Finance, Insurance, Real Estate	10	6	55	1%	0%	0.22	\$47,093	128%
Trucking & Warehousing	7	7	51	1%	0%	0.31	\$38,115	104%
Combined others**	7	185	1,292	34%				
(primary metals mfg.; printing & publishing, apparel & textiles mfg., chemical products mfg.)								
Combined Industrial Sectors	70	39	2,754	72%	1%	2.13	\$45,607	124%
All Industries	188	20	3,848	100%	0%	1.00	\$36,797	100%

* Share of the district's employment in this industry divided by the share of metro area (Clackamas, Columbia, Multnomah, Washington, Yamhill Counties) employment in the industry.

** Remainder of largest 15 industries are combined, because data on individual industries is suppressed.

Sources: Bureau of Planning calculations from Oregon Employment Department and U.S. Bureau of Labor Statistics data on "covered employment."

Largest Employers

	Industry	Employment
PCC Structural Corp.	Nonferrous Die-castings Except Aluminum	500+
Promotion Products, Inc.	Wood Partitions And Fixtures	100-249
Columbia Knit, Inc.	Knit Outerwear Mills	100-249
East Side Plating Works	Electroplating Plating Polishing	100-249
Pacific Hoe Saw & Knife Co.	Machine Tool Accessories	100-249

Source: Inside Prospects

Land Supply Characteristics

Site Size

Average site size in the Outer Southeast district is about 1.5 acres, compared to an average 4 acres among all districts. One third of the district's acreage is in sites with less than 3 acres in size, compared to an average 14 percent in all districts.

	< 3 Acres	3 - 9 Acres	10 - 19 Acres	20 - 49 Acres	50 + Acres	Average Site Size
Sites	272	22	8	0	1	
% of All Sites	90%	7%	3%	0%	0%	
Acres	154	111	104	0	103	1.56
% of All Acres	33%	24%	22%	0%	22%	

Vacant Land

The Outer Southeast district contained only 30 acres of vacant (unimproved), buildable industrial land in 2000 (Metro data), representing about 6 percent of the district's total acreage. Of that vacant land, less than one acre is rated as having no identified development constraints (Tier A).

	Total Vacant 2001	Buildable Vacant Land 2000 (deducting Title 3 lands)						Total Buildable
		Tier A - no constraints	Tier B - unoccupied	Tier B - part occupied	Tier C - infill	Tier C - overvalued	Tier D - redevelop	
Sites	45	3	0	1	21	4	4	32
Vacant Acres	112	0.3	0	15	10	5	0.2	30
% of All Acres	23.7%	0.1%	0.0%	3.2%	2.1%	1.1%	0.1%	6.4%

Data source: Metro

Zoning

The *Portland Zoning Code* applies General Industrial (IG1 and IG2) zoning to 40 percent of the acreage in the district, General Employment (EG2) zoning to 34 percent, and Heavy Industrial (IH) zoning to 17 percent.

	Heavy Industrial IH	General Industrial		Employment		Other
		IG1	IG2	EG1	EG2	
Acres	82	28	160	2	158	41
% of All Acres	17%	6%	34%	0.4%	34%	9%

Assessed Property Value

The average assessed land value per square foot in the Outer Southeast district is \$3.26, compared to an average \$6.58 among all districts. The average improvements-to-land-value ratio in the district is 194 percent.

	Total Value, All Sites (\$000)	Higher Valued Sites*		Average Value per Square Foot	Improvements to Land Value Ratio
		Sites	% of All Sites		
Land	\$66,939	114	2.8%	\$3.26	<hr/> 194%
Improvements	\$129,568	118	2.9%	\$6.30	
Total	\$196,507	114	2.8%	\$9.56	

* Sites in district with value per square foot at least 120% of the average in all districts.

Site Advantages

Transportation Access

Eighty-one percent of the acreage in the district is on sites within one mile of a freeway on-ramp or off-ramp. All sites in the district are within one-half mile of a bus stop.

Miles from site	Major Truck Street				Freeway				Airport			
	Sites	% of All Sites	Acres	% of All Acres	Sites	% of All Sites	Acres	% of All Acres	Sites	% of All Sites	Acres	% of All Acres
< 1	275	91%	397	84%	257	85%	384	81%	0	0%	0	0%
1 to <2	28	9%	75	16%	41	14%	65	14%	0	0%	0	0%
2 to <5	0	0%	0	0%	5	2%	23	5%	73	24%	34	7%
5 or more	0	0%	0	0%	0	0%	0	0%	230	76%	438	93%

Railroad Access (Adjacent)				Harbor Access (Adjacent)				Bus Stop within 1/2 mile			
Sites	% of All Sites	Acres	% of All Acres	Sites	% of All Sites	Acres	% of All Acres	Sites	% of All Sites	Acres	% of All Acres
6	2%	19	4%	0	0%	0	0%	303	100%	472	100%

Access to Public Redevelopment Tools

Urban Renewal Area

Sites	% of All Sites	Acres	% of All Acres
232	77%	329	70%

Enterprise Zone

Sites	% of All Sites
0	0%

New Market Tax Credits

Sites	% of All Sites
162	53%

Capital Improvements Plan (CIP) projects

Capital projects in the City of Portland CIP Database that will expand the district’s development capacity:

- Redevelopment assistance (PDC000107) - Identify and eliminate constraints to redevelop industrially zoned lands in Lents Town Center. Elements may include environmental assessments, acquisition/aggregation of parcels, and site remediation. Project goals are to produce quality jobs and stimulate development.

Development Constraints

Environmental Constraints

An estimated 44 percent of the district acreage is affected by environmental constraints within a composite layer developed for the inventory, consisting of lands with floodplain, 10 percent or greater slopes, wetlands, and/or environmental protection (p or n) zones. Thirty percent of the district acreage is affected by floodplain, and 15 percent is affected by relatively steep slopes of 10 percent or more.

	Sites	% of All Sites	Acres	% of All Acres
Environmental Protection Zone (p)	35	12%	42	9%
Greenway Natural Zone (n)	0	0%	0	0%
100 Year Floodplain	97	32%	136	29%
Additional 1996 Flood Inundation Area	18	6%	5	1%
Title 3 Wetlands	6	2%	5	1%
10% or Greater Slope	71	23%	69	15%
Composite Constraints (all of above)	136	45%	210	44%
Goal 5 Significant Habitat Inventory	112	37%	190	40%

Proximity to Residential Zones

Two thirds of the district acreage is on sites within 500 feet of a residential zone, and 14 percent is on sites within 200 feet, posing potential constraints for industrial activities with off-site impacts.

Distance from site	Sites	% of All Sites	Acres	% of All Acres
Less than 200 feet	96	32%	64	14%
200 - 500 feet	143	47%	249	53%

Sites Lacking On-Site or Adjacent Sewer

Only 1 percent of the district acreage is on sites that lack on-site or adjacent access to public sewer collection lines.

Sites	% of All Sites	Acres	% of All Acres
6	2%	6	1%

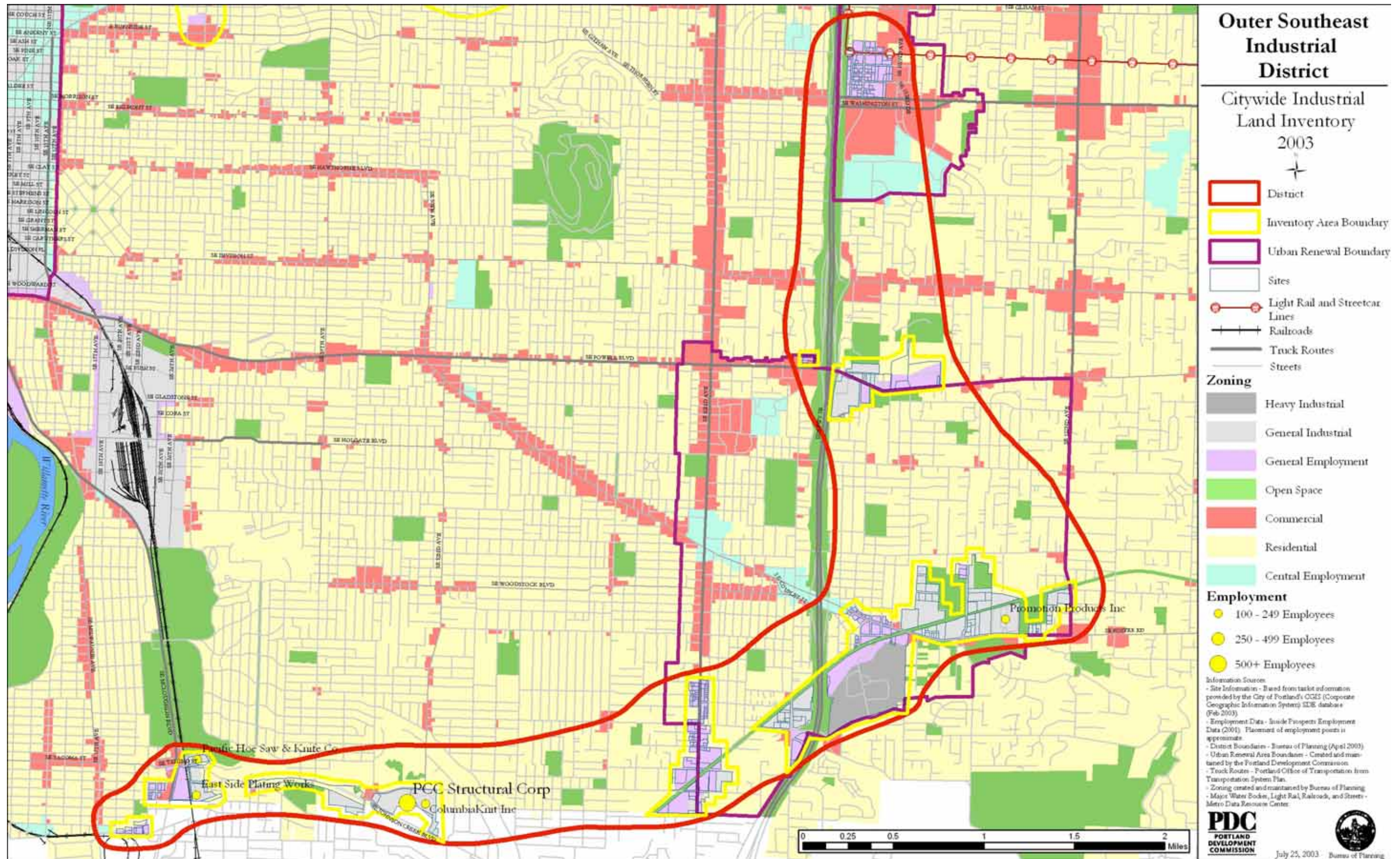
Environmental Site Cleanup or Investigation Projects

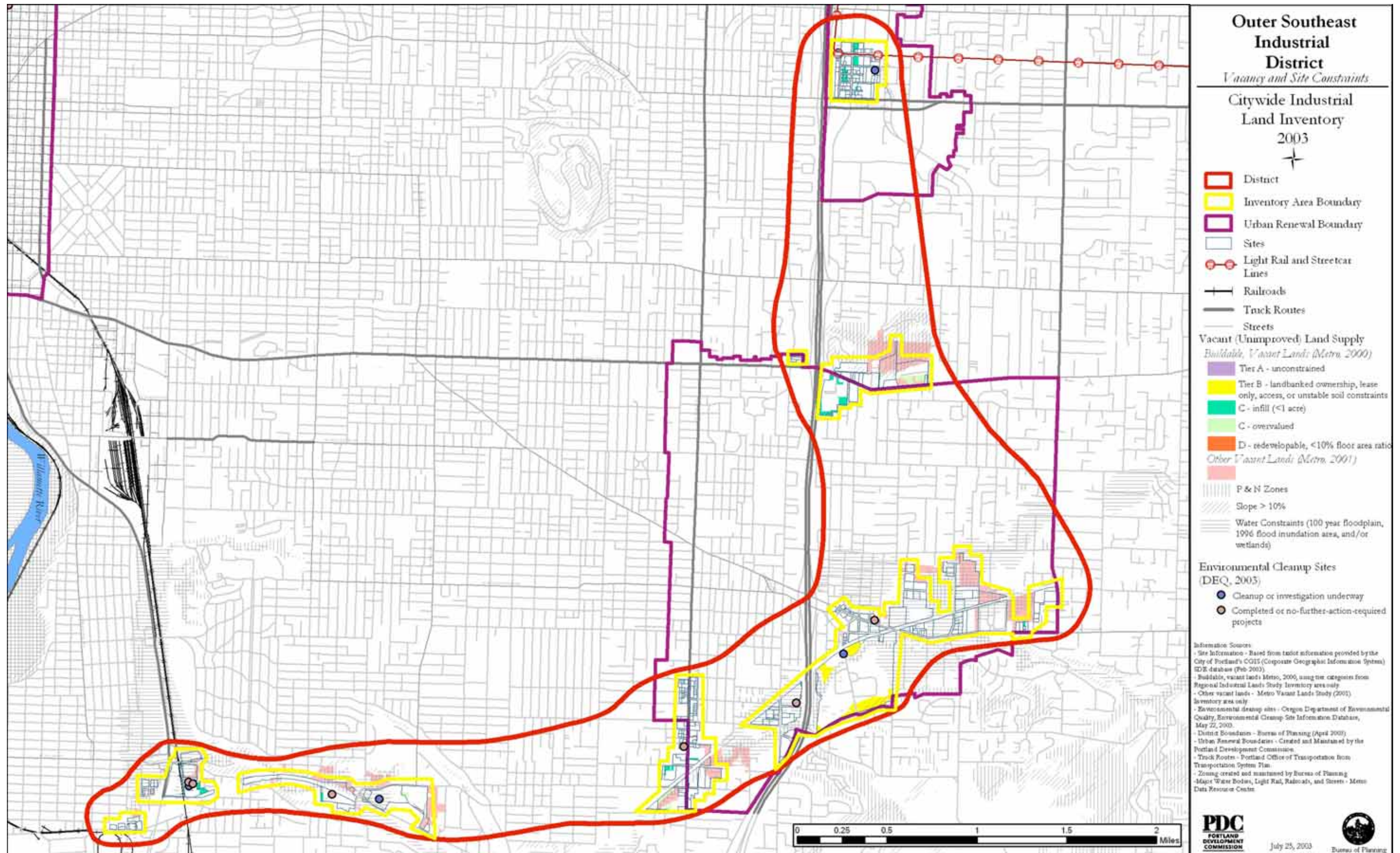
7 identified sites in the district have environmental cleanup or investigation projects underway.

7 identified sites in the district have completed cleanup projects or "no further action required" determinations

by DEQ, indicating that they pose no significant threat to human health or the environment.

Source: Oregon Department of Environmental Quality, Environmental Cleanup Site Information database, May 2003





H. Rivergate

The Rivergate district is bounded on the east by the Burlington Northern Santa Fe railroad cut and, for the purpose of this inventory, was drawn to include the St. Johns industrial areas to the south. Rivergate is at the north end of the east bank of Portland Harbor area and at the west end of the Columbia Corridor.

- 4,154 acres in district
- 25% share of acreage in all Portland industrial districts
- 330 sites (adjacent taxlots under one ownership)

Industry Mix

In Rivergate, an estimated 190 businesses employed 9,300 workers in 2000. Eighty-six percent of those jobs were in the industrial sectors, including 59 percent of district employment in the manufacturing sector, 17 percent in wholesale trade, and 12 percent in transportation. The district contains a third of the metro area employment in primary metals manufacturing, one of the region's largest basic industries. Other industry specialties of the district include food products manufacturing, water transportation, and chemical products manufacturing, each of which have relatively high concentrations of their metro area employment in Rivergate.

Largest 15 Industry Segments

Largest 15 Industry Segments	Firms & Jobs 2000				District Specialties		Yearly Pay per Worker	
	Firms	Jobs/ Firm	Jobs	Share of District Jobs	District Share of Metro Jobs	Location Quotient*	Average Pay, Multnomah County	Percent of Pay in All Industries
Primary metals mfg.	8	303	2,426	26%	33%	29.69	\$48,014	130%
Wholesale Trade	49	31	1,538	17%	2%	2.22	\$43,884	119%
Food products mfg.	11	80	875	9%	11%	10.09	\$36,320	99%
Trucking & warehousing	24	31	753	8%	5%	4.46	\$38,115	104%
Transportation equipment mfg.	5	123	616	7%	5%	4.63	\$51,232	139%
Retail Trade	11	51	557	6%	0%	0.34	\$20,869	57%
Services	21	17	356	4%	0%	0.14	\$33,500	91%
Fabricated metal products	8	37	294	3%	3%	2.56	\$35,503	96%
Water transportation	7	37	258	3%	12%	10.59	\$52,121	142%
Construction	11	16	177	2%	0%	0.36	\$46,355	126%
Chemical products mfg.	8	18	140	2%	8%	7.64	\$47,871	130%
Combined others** (misc. mfg. industries (SIC 39), electronics mfg., furniture & fixtures mfg., paper products mfg.)	7	120	842	9%				
Combined Industrial Sectors	163	49	7,990	86%	3%	2.55	\$45,607	124%
All Industries	194	48	9,309	100%	1%	1.00	\$36,797	100%

* Share of the district's employment in this industry divided by the share of metro area (Clackamas, Columbia, Multnomah, Washington, Yamhill Counties) employment in the industry.

** Remainder of largest 15 industries are combined, because data on individual industries is suppressed.

Sources: Bureau of Planning calculations from Oregon Employment Department and U.S. Bureau of Labor Statistics data on "covered employment."

Largest Employers

	Industry	Employment
Oregon Steel Mills, Inc.	Metals Service Centers And Offices	500+
Columbia Sportswear Co.	Womens And Childrens Clothing	250-499
Del Monte Fresh Produce	Fresh Fruits And Vegetables	250-499
Nordstrom Distribution Center	General Warehousing And Storage	250-499
Phoenix Gold International, Inc.	Household Audio And Video Equipment	250-499
Purdy Corporation	Brooms And Brushes	250-499
Consolidated Metco, Inc.	Motor Vehicle Parts And Accessories	250-499
Schnitzer Steel Products International	Metals Service Centers And Offices	250-499
Sealy Stearns & Foster	Mattresses And Foundations & Convertible	250-499
Columbia Steel Casting Co.	Steel Investment Foundries	250-499

Source: Inside Prospects

Land Supply Characteristics

Site Size

Average site size in the Rivergate district is about 12 acres, compared to an average 4 acres among all districts. Over half of the district's acreage is in sites within 15 sites that are 50 acres or larger in size.

	< 3 Acres	3 - 9 Acres	10 - 19 Acres	20 - 49 Acres	50 + Acres	
Sites	175	88	26	26	15	Average
% of All Sites	53%	27%	8%	8%	5%	Site Size
Acres	139	507	351	801	2357	12.59
% of All Acres	3%	12%	8%	19%	57%	

Vacant Land

Rivergate contained an estimated 566 acres of vacant (unimproved), buildable industrial land in 2000 (Metro data), representing about 14 percent of the district's total acreage. Of that vacant land, only 47 acres is rated as having no identified development constraints (Tier A).

	Total Vacant 2001	Buildable Vacant Land 2000 (deducting Title 3 lands)						Total Buildable
		Tier A - no constraints	Tier B - unoccupied	Tier B - part Occupied	Tier C - infill	Tier C - overvalued	Tier D - redevelop	
Sites	137	14	24	8	39	21	15	103
Vacant Acres	1,137	47	330	101	21	46	21	566
% of All Acres	27.4%	1.1%	7.9%	2.4%	0.5%	1.1%	0.5%	13.6%

Data source: Metro

Assessed Property Value

The average assessed land value per square foot in Rivergate is \$3.11, compared to an average \$6.58 among all districts. The average improvements-to-land-value ratio in the district is 148 percent.

	Total Value, All Sites (\$000)	Higher Valued Sites*		Average Value per Square Foot	Improvements to Land Value Ratio
		Sites	% of All Sites		
Land	\$563,021	7	0.2%	\$3.11	148%
Improvements	\$834,951	81	2.0%	\$4.61	

Total | \$1,397,972 | 60 | 1.5% | \$7.73
* Sites in district with value per square foot at least 120% of the average in all districts.

Zoning

The *Portland Zoning Code* applies Heavy Industrial (IH) zoning to 75 percent of the acreage in the district, and General Industrial (IG2) zoning to another 11 percent of the district.

	Heavy Industrial	General Industrial		Employment		Other
	IH	IG1	IG2	EG1	EG2	
Acres	3095	0	466	0	89	505
% of All Acres	75%	0%	11%	0%	2%	12%

Site Advantages

Transportation Access

Rivergate has arguably the most advantageous multimodal freight transportation access in the region. Major transportation facilities in the district include the Port of Portland’s three largest marine terminals (T4, T5, and T6), Union Pacific’s Barnes Yard, and rail access by both Union Pacific and Burlington Northern Santa Fe lines. Rail access is potentially available to 51 percent of the acreage in Rivergate on sites with on-site or adjacent to rail lines. Maritime access to Portland Harbor is potentially available to 43 percent of the district acreage on sites between the river and the nearest street or railroad right-of-way. While only 5 percent of the district is within two miles of a freeway on-ramp or off-ramp, virtually all of the district is within 5 miles, and 51 percent is on sites within one mile of a Regional or Major Truck Street. Eighty percent of the district acreage is on sites within one-half mile of a bus stop.

Miles from site	Major Truck Street				Freeway				Airport			
	Sites	% of All Sites	Acres	% of All Acres	Sites	% of All Sites	Acres	% of All Acres	Sites	% of All Sites	Acres	% of All Acres
< 1	235	71%	2,118	51%	0	0%	0	0%	0	0%	0	0%
1 to <2	94	28%	2,033	49%	38	12%	190	5%	0	0%	0	0%
2 to <5	1	0.3%	4	0%	290	88%	3933	95%	0	0%	0	0%
5 or more	0	0%	0	0%	2	1%	31.06	1%	330	100%	4,154	100%

	Railroad Access (Adjacent)				Harbor Access (Adjacent)				Bus Stop within 1/2 mile			
	Sites	% of All Sites	Acres	% of All Acres	Sites	% of All Sites	Acres	% of All Acres	Sites	% of All Sites	Acres	% of All Acres
	112	34%	2,116	51%	80	24%	1785	43%	309	94%	3,331	80%

Access to Public Redevelopment Tools

Urban Renewal Area

Sites	% of All Sites	Acres	% of All Acres
	0		0%

Enterprise Zone

Sites	% of All Sites
	330

New Market Tax Credits

Sites	% of All Sites
	187

Capital Improvements Plan (CIP) projects

Capital projects in the City of Portland CIP Database that will expand the district’s development capacity:

- New Lombard rail overpass (PDT000040) - The project will construct an overpass on the existing alignment of N Lombard Street to remove two at-grade rail crossings. The project will improve freight access by removing a

bottleneck. The project will allow for improved freight rail service to the Rivergate Industrial Area. The project will include bike lanes and sidewalks.

- Marine Drive widening (PDT000044) - Widen Marine Drive from Kelly Point Park to 2.4 miles to the east. The project widens Marine Drive to a 5-lane section with bike lanes and center-turn lane. It also provides a sidewalk on the north side, multi-use path on the south side, bus pull-outs, pedestrian refuges, stormwater quality treatment, hazardous spill containment, and noise barriers.
- Sewer pump station (BES005689) - Replace the pump station at intersection of Rivergate Boulevard and Time Oil Road. The new pump station will be located out of the intersection near the BPA right-of-way and the wetland mitigation area. This will be a submersible station with a new wet well.
- Water main and hydrants (WTR000066) - Install 3443 feet of 24" DI main and 7 hydrants. Limits: N Kelly Point Park Rd to N Suttle Rd. Lead Project: WTR000267 PDOT Adjustments.
- Non-potable water system (WTR000153) – Install a non-potable well water system for supplying irrigation and process water to Rivergate businesses. Area limits of Phase 1: N. Lombard from 3000 feet south of Columbia Slough to N. Marine Drive and from Columbia Slough Crossing to N. Suttle Rd. Limits of Phase 2: N. Lombard from 1,500 feet south of Simmons Rd. to N. Harborage St.; and 3000 feet in N. Ramsey West of N. Lombard. Limits of Phase 3: N. Lombard from N. Harborage to PGE Easement West 2,500 feet to Rivergate Blvd. Lead Project: WTR000248 Water Reuse & Alternate Use.
- Water mains (WTR000130) - Installation of two water mains to complete loop in the Rivergate area in response to growth. Limits: N. Terminal Rd to N. Columbia Blvd along N Burgard St. / N. Columbia Blvd. to N. Bonneville Way along Lombard St. Lead Project: WTR000266 ODOT Adjustment.

Development Constraints

Environmental Protection

Over half of Rivergate’s acreage is affected by environmental constraints within a composite layer developed for the inventory, consisting of lands with floodplain, 10 percent or greater slopes, wetlands, and/or environmental protection (p or n) zones. About 46 percent of the district acreage is affected by floodplain and 11 percent by steep slopes.

	Sites	% of All Sites	Acres	% of All Acres
Environmental Protection Zone (p)	8	2%	447	11%
Greenway Natural Zone (n)	5	1.5%	13	0.3%
100 Year Floodplain	118	36%	1,607	39%
Additional 1996 Flood Inundation Area	31	9%	301	7%
Title 3 Wetlands	25	8%	543	13%
10% or Greater Slope	199	60%	437	11%
Composite Constraints (all of above)	267	81%	2,187	53%
Goal 5 Significant Habitat Inventory	168	51%	1,858	45%

Proximity to Residential Zones

Six percent of the district acreage is on sites within 500 feet of a residential zone, and 1 percent is on sites within 200 feet, posing potential constraints for industrial activities with off-site impacts. These sites are concentrated in the St. Johns portion of the district.

Distance from site	Sites	% of All Sites	Acres	% of All
--------------------	-------	----------------	-------	----------

				Acres
Less than 200 feet	53	16%	29	1%
200 - 500 feet	55	17%	202	5%

Sites Lacking On-Site or Adjacent Sewer

Four percent of the district acreage is on sites that lack on-site or adjacent access to public sewer collection lines.

Sites	% of All Sites	Acres	% of All Acres
48	15%	148	4%

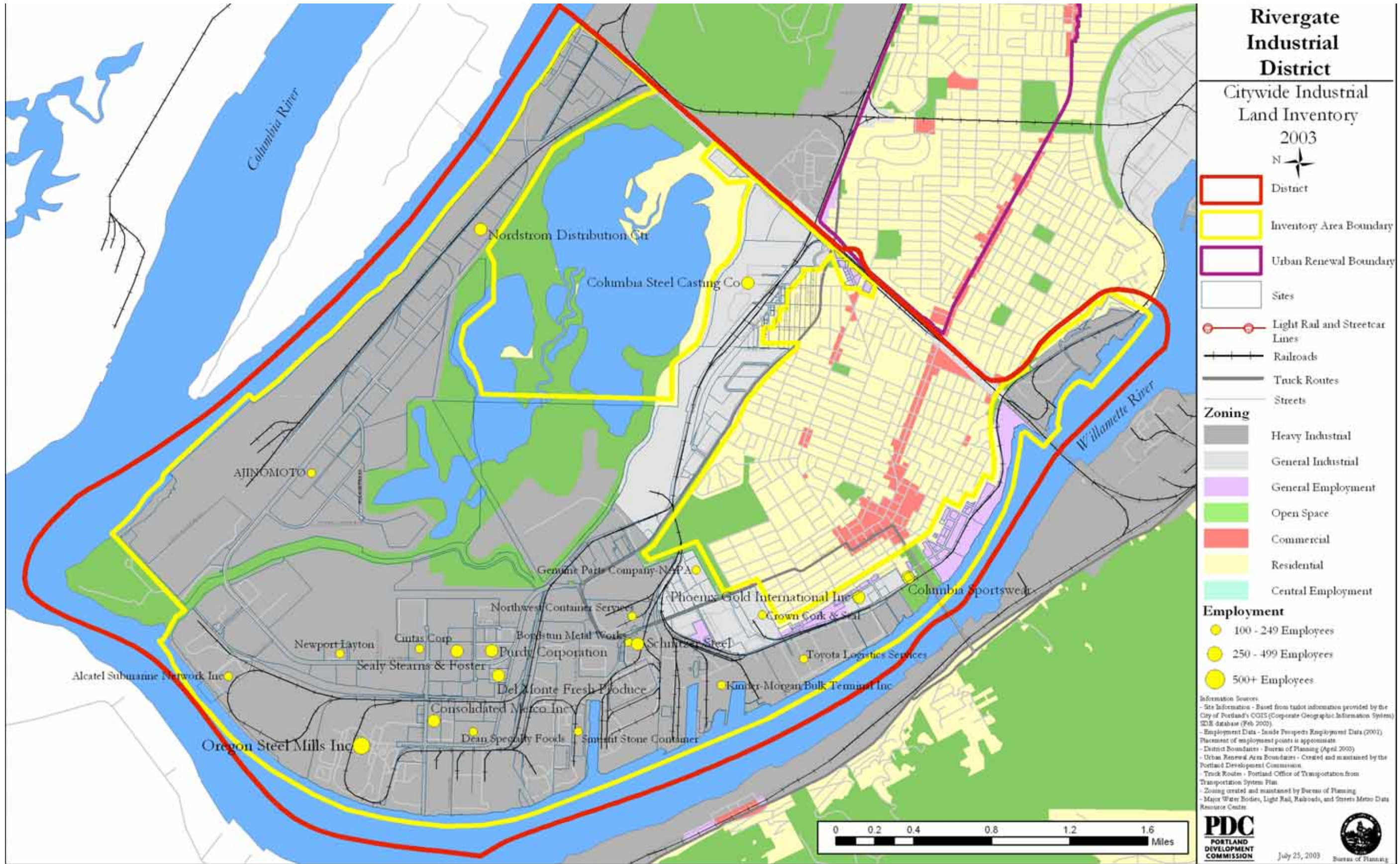
Environmental Site Cleanup or Investigation Projects

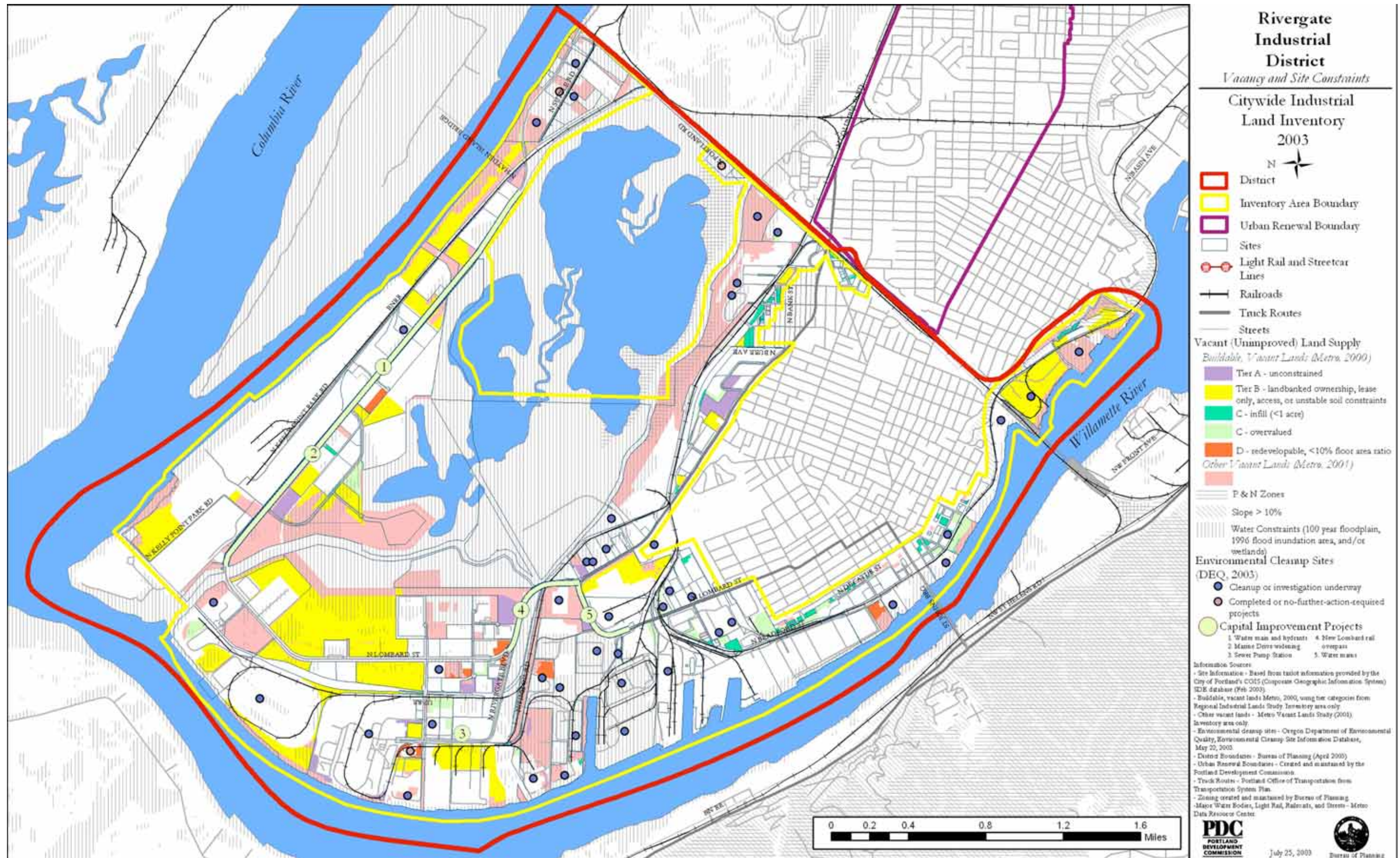
70 identified sites in the district have environmental cleanup or investigation projects underway.

7 identified sites in the district have completed cleanup projects or "no further action required" determinations

by DEQ, indicating that they pose no significant threat to human health or the environment.

Source: Oregon Department of Environmental Quality, Environmental Cleanup Site Information database, May 2003





I. Swan Island / Lower Albina

The Swan Island and adjacent Lower Albina areas are situated along the east bank of Portland Harbor, north of the Central City.

- 1,042 acres in district
- 6% share of the acreage in all Portland industrial districts
- 283 sites (adjacent taxlots under single ownership)

Industry Mix

In the Swan Island/Lower Albina district, an estimated 280 businesses employed 15,000 workers in 2000. Ninety percent of those jobs were in the industrial sectors (the highest share among Portland's industrial districts), including 39 percent of district employment in transportation equipment manufacturing, a substantial share in air transportation (data suppressed for confidentiality), and 13 percent in wholesale trade. The district contains 48 percent of the metro area employment in transportation equipment manufacturing, one of the region's largest basic industries.

Largest 15 Industry Segments

Largest 15 Industry Segments	Firms & Jobs 2000				District Specialties		Yearly Pay per Worker	
	Firms	Jobs/ Firm	Jobs	Share of District Jobs	District Share of Metro Jobs	Location Quotient*	Average Pay, Multnomah County	Percent of Pay in All Industries
Transportation Equipment Mfg.	11	526	5,781	39%	48%	27.03	\$51,232	139%
Wholesale Trade	72	27	1,951	13%	3%	1.75	\$43,884	119%
Trucking & Warehousing	28	49	1,379	9%	9%	5.08	\$38,115	104%
Construction	23	49	1,127	8%	2%	1.41	\$46,355	126%
Services	53	17	920	6%	0%	0.22	\$33,500	91%
Retail Trade	23	25	569	4%	0%	0.22	\$20,869	57%
Stone, Clay & Glass Products	9	22	200	1%	6%	3.50	\$39,019	106%
Fabricated Metal Products	6	32	189	1%	2%	1.02	\$35,503	96%
Electronics Mfg.	5	19	94	1%	0%	0.19	\$48,313	131%
Misc. Mfg. Industries	7	13	91	1%	4%	2.13	\$28,355	77%
Transportation Services	7	11	80	1%	2%	1.20	\$35,338	96%
Combined others**	11	215	2,364	16%				
(air transportation, food products mfg., paper products mfg., chemical products mfg.)								
Combined Industrial Sectors	195	69	13,460	90%	5%	2.67	\$45,607	124%
All Industries	278	54	14,978	100%	2%	1.00	\$36,797	100%

* Share of the district's employment in this industry divided by the share of metro area (Clackamas, Columbia, Multnomah, Washington, Yamhill Counties) employment in the industry.

** Remainder of largest 15 industries are combined, because data on individual industries is suppressed.

Sources: Bureau of Planning calculations from Oregon Employment Department and U.S. Bureau of Labor Statistics data on "covered employment."

Largest Employers

	Industry	Employment
United Parcel Service	Local Trucking Without Storage	500+
Tiffany Food Service, Inc.	Merchandising Machine Operators	500+
Freightliner Corp.-Parts Mfg.	Motor Vehicle Parts And Accessories	500+
Freightliner Corp	Motor Vehicles And Car Bodies	500+
Columbia Distributing Co.	Beer And Ale	500+
Freightliner Corp-Truck Mfg.	Motor Vehicles And Car Bodies	500+
Portland School District 1-J	Elementary And Secondary Schools	500+

Source: Inside Prospects

Land Supply Characteristics

Site Size

Average site size in the Swan Island/Lower Albina district is about 4 acres, the same as the average among all districts. The range of district acreage among various site sizes is comparable to the average of all districts.

	< 3 Acres	3 - 9 Acres	10 - 19 Acres	20 - 49 Acres	50 + Acres	
Sites	218	45	14	3	3	Average Site Size
% of All Sites	77%	16%	5%	1%	1%	
Acres	174	245	183	72	368	3.7
% of All Acres	17%	24%	18%	7%	35%	

Vacant Land

The district contained 53 acres of vacant (unimproved), buildable industrial land in 2000 (Metro data), representing about 5 percent of the district's total acreage. None of that vacant land is rated as having no identified development constraints (Tier A).

	Total Vacant 2001	Buildable Vacant Land 2000 (deducting Title 3 lands)						
		Tier A - no constraints	Tier B - unoccupied	Tier B - part occupied	Tier C- infill	Tier C - overvalued	Tier D - redevelop	Total Buildable
Sites	42	0	4	1	17	5	8	28
Vacant Acres	79	0	22	4	6	18	3	53
% of All Acres	7.6%	0.0%	2.1%	0.4%	0.6%	1.7%	0.3%	5.1%

Data source: Metro

Zoning

The *Portland Zoning Code* applies General Industrial (IG1 and IG2) zoning to 54 percent of the acreage in the Swan Island/Lower Albina district. Another 38 percent has Heavy Industrial (IH) zoning.

	Heavy Industrial IH	General Industrial		Employment		Other
		IG1	IG2	EG1	EG2	
Acres	400	93	465	4	69	11
% of All Acres	38%	9%	45%	0%	7%	1%

Assessed Property Value

The average assessed land value per square foot in the Swan Island/Lower Albina district is \$4.92, compared to an average \$6.58 among all districts. The average assessed value of property improvements per square foot in the district is \$10.56, compared to an average \$7.24 among all districts.

	Total Value, All Sites (\$000)	Higher Valued Sites*		Average Value per Square Foot	Improvements to Land Value Ratio
		Sites	% of All Sites		
Land	\$223,138	125	3.1%	\$4.92	<hr/> 215%
Improvements	\$479,356	137	3.4%	\$10.56	
Total	\$702,494	144	3.6%	\$15.48	

* Sites in district with value per square foot at least 120% of the average in all districts.

Site Advantages

Transportation Access

Eighty-eight percent of the acreage in the district is on sites within two miles of a freeway on-ramp or off-ramp, and 70 percent is on sites within one mile of a Regional or Major Truck Street. Rail access is potentially available to about half of the district acreage on sites with on-site or adjacent to rail lines. The Albina Yard, operated by Union Pacific Railroad, is a prominent feature of the Lower Albina area. Maritime access to Portland Harbor is potentially available to 32 percent of the district acreage on sites between the river and the nearest street or railroad right-of-way. The entire district is within one half mile of a bus stop.

Miles from site	Major Truck Street				Freeway				Airport			
	Sites	% of All Sites	Acres	% of All Acres	Sites	% of All Sites	Acres	% of All Acres	Sites	% of All Sites	Acres	% of All Acres
< 1	234	83%	729	70%	178	63%	380	36%	0	0%	0	0%
1 to <2	49	17%	313	30%	102	36%	539	52%	0	0%	0	0%
2 to <5	0	0%	0	0%	3	1%	123	12%	0	0%	0	0%
5 or more	0	0%	0	0%	0	0%	0	0%	283	100%	1,042	100%

Railroad Access (Adjacent)				Harbor Access (Adjacent)				Bus Stop within 1/2 mile			
Sites	% of All Sites	Acres	% of All Acres	Sites	% of All Sites	Acres	% of All Acres	Sites	% of All Sites	Acres	% of All Acres
93	33%	526	51%	34	12%	333	32%	283	100%	1,042	100%

Access to Public Redevelopment Tools

Urban Renewal Area

Sites	% of		Acres	% of	
	All Sites	All Acres		All Sites	All Acres
198	70%		317	30%	

Enterprise Zone

% of	
Sites	All Sites
283	100%

New Market Tax Credits

% of	
Sites	All Sites
143	51%

Capital Improvements Program (CIP) projects

No capital projects in the City of Portland CIP Database were identified that will expand this specific district's development capacity.

Development Constraints

Environmental Constraints

Twenty percent of the Swan Island / Lower Albina district acreage is in the floodplain. A fourth of the district acreage is affected by environmental constraints within a composite layer developed for the inventory, consisting of lands with floodplain, 10 percent or greater slopes, wetlands, and/or environmental protection (p or n) zones.

	Sites	% of All Sites	Acres	% of All Acres
Environmental Protection Zone (p)	0	0%	0	0%
Greenway Natural Zone (n)	1	0%	1	0.1%
100 Year Floodplain	39	14%	190	18%
1996 Flood Inundation Area	13	5%	19	2%
Title 3 Wetlands	0	0%	0	0%
10% or Greater Slope	134	47%	98	9%
Composite Constraints (all of above)	154	54%	263	25%
Goal 5 Significant Habitat Inventory	48	17%	133	13%

Proximity to Residential Zones

Ten percent of the district acreage is on sites within 500 feet of a residential zone, and 1 percent is on sites within 200 feet, posing potential constraints for industrial activities with off-site impacts.

Distance from site	Sites	% of All Sites	Acres	% of All Acres
Less than 200 feet	21	7%	11	1%
200 - 500 feet	52	18%	97	9%

Sites Lacking On-Site or Adjacent Sewer

Three percent of the district acreage is on sites that lack on-site or adjacent access to public sewer collection lines.

Sites	% of All Sites	Acres	% of All Acres
19	7%	26	3%

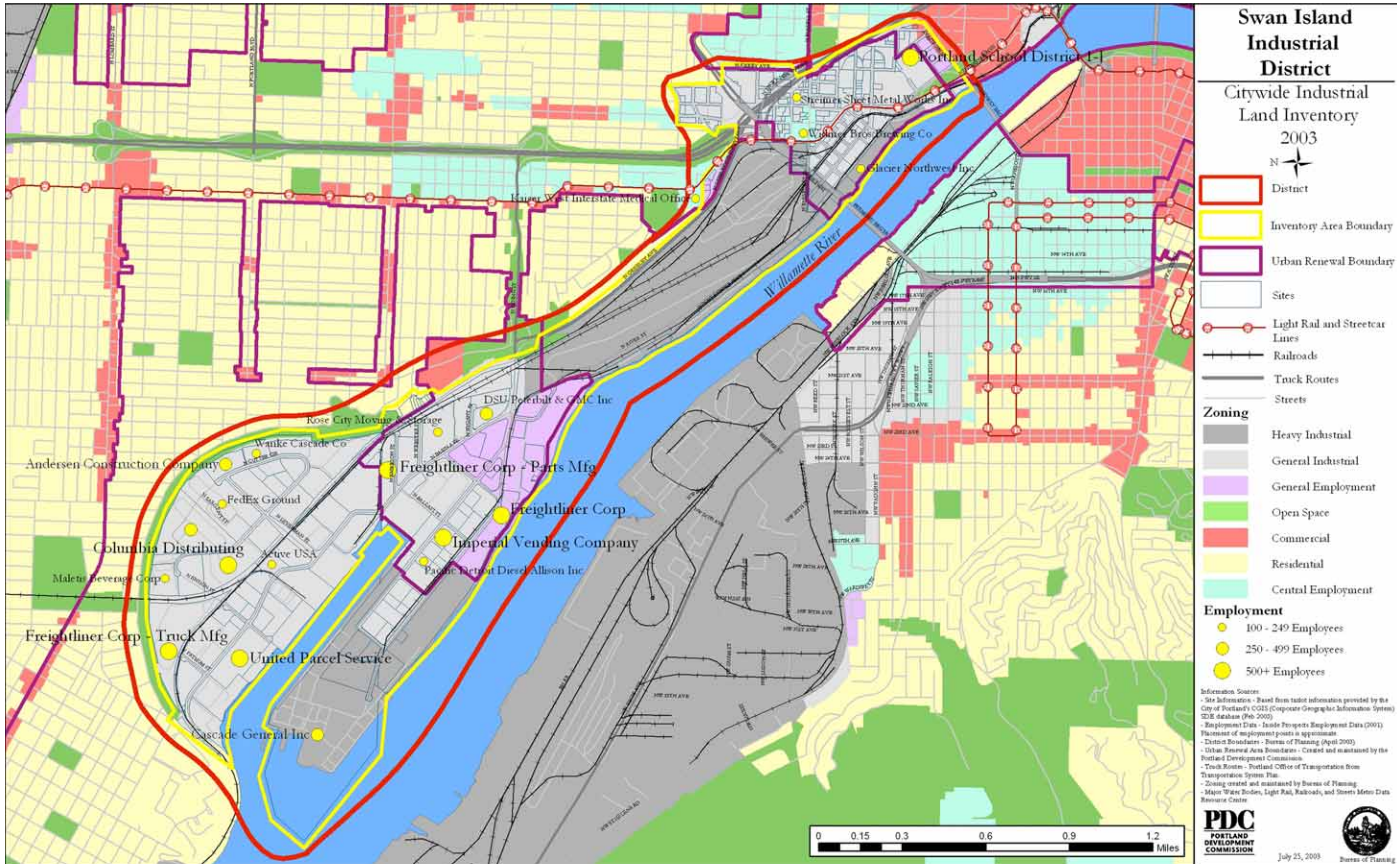
Environmental Site Cleanup or Investigation Projects

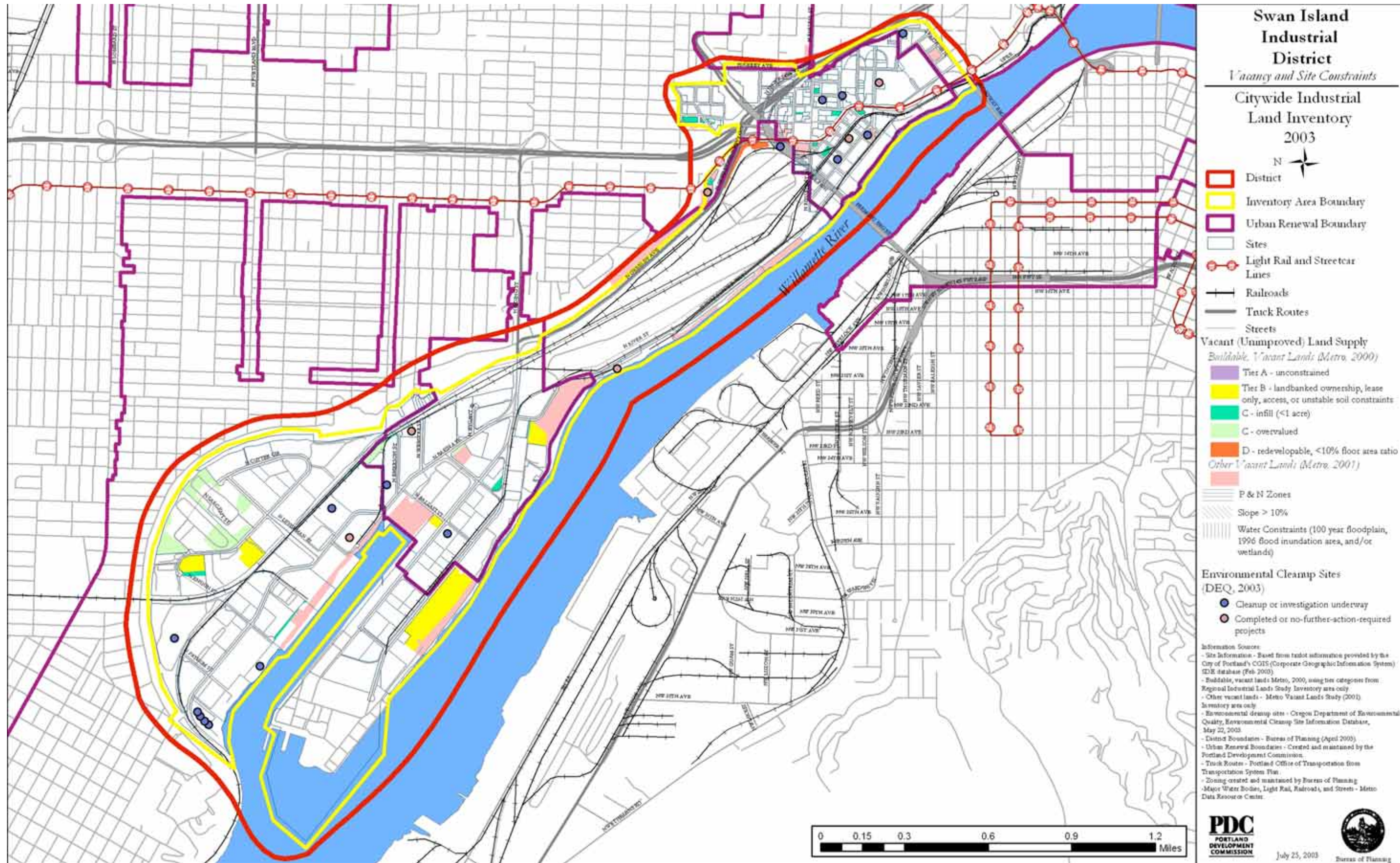
15 identified sites in the district have environmental cleanup or investigation projects underway.

6 identified sites in the district have completed cleanup projects or "no further action required" determinations

by DEQ, indicating that they pose no significant threat to human health or the environment.

Source: Oregon Department of Environmental Quality, Environmental Cleanup Site Information database, May 2003





4. Industrial and Employment Zones Performance

Land and Employment by Zone

The inventory area, intending to reflect Portland's committed industrial land supply, consists of all taxlots with General Industrial (IG), Heavy Industrial (IH), or General Employment (EG) zoning in the *Portland Zoning Code* and any additional taxlots with corresponding Industrial Sanctuary or Mixed Employment designations in the *Comprehensive Plan*. The latter are expected to convert to industrial or employment zones over the long term. General Employment zones are included because they emphasize industrial and industrially related uses, while allowing a somewhat broader mix of land uses.

Land in industrial zones accounts for 85 percent of the inventory area and 87 percent of the employment within that area. Land in the General Employment zones accounts for 8 percent of the inventory area and 13 percent of the inventory employment. Open space zoning applies to 6 percent of the inventory area and consists mostly of open space portions of larger sites (adjacent taxlots under single ownership), such as in the Smith and Bybee Lakes area.

Average jobs per developed acre are calculated below by including only sites with identified employers and excluding the acreage in vacant portions of those sites. The IH and IG2 large-lot industrial zones, which together account for about 80 percent of the inventory area, average 8 and 10 jobs per developed acre, respectively. The EG2 large-lot General Employment zone averages 25 jobs per developed acre. The small-lot industrial and employment zones have substantially higher employment densities with 47 jobs per developed acre in IG1 and 63 jobs per developed acre in EG1.

Zones	Land area 2003				Employment 2000		
	Sites	% of All Zones	Acreage	% of All Zones	Jobs	% of All Zones	Jobs per Acre*
Industrial zones	3,105	77%	14,090	85%	94,307	87%	11
IH Heavy Industrial	787	20%	5,669	34%	25,644	24%	8
IG1 General Ind., small lot	1,082	27%	761	5%	23,693	22%	47
IG2 General Ind., large lot	1,236	31%	7,659	46%	44,970	41%	10
General Employment zones	728	18%	1,291	8%	14,097	13%	27
EG1 General Emp., small lot	151	4%	53	0%	1,409	1%	63
EG2 General Emp., large lot	577	14%	1,238	7%	12,688	12%	25
Other zones*	188	5%	1,241	7%	414	0.4%	1.5
OS Open Space	16	0.4%	988	6%	141	0.1%	0.5
R Residential Zones	157	4%	118	1%	22	0.0%	7
C Commercial Zones	10	0.2%	132	1%	135	0.1%	129
EX Central Employment	5	0.1%	3	0%	116	0.1%	73
All Zones	4,022	100%	16,623	100%	108,818	100%	12

* Jobs per developed acre, including only sites with employers and excluding vacant (unimproved) portion of site.

** Other zones have IS Industrial Sanctuary or EM Mixed Employment designations in the *Comprehensive Plan*, which anticipates conversion to industrial or general employment zones over time.

Land Use Characteristics

Site Size

Average site size is 7.2 acres in the IH Heavy Industrial zone, 6.2 acres in the IG2 General Industrial zone, and 2.1 acres in the EG2 General Employment zone. Average site size in the small-lot IG1 and EG1 zones are less than an acre. The site size distribution of each zone is as follows.

Zone	Acres by Site Size						Average Site Size
	< 3 Acres	3 - 9 Acres	10 - 19 Acres	20 - 49 Acres	50 + Acres	All Acres	
Industrial							
IH Acres	503	869	718	1,223	2,356	5,669	7.2
% of All IH	9%	15%	13%	22%	42%	100%	
IG1 Acres	500	123	85	0	54	761	0.7
% of All IG1	66%	16%	11%	0%	7%	100%	
IG2 Acres	844	1,248	1,243	821	3,503	7,659	6.2
% of All IG2	11%	16%	16%	11%	46%	100%	
General Employment							
EG1 Acres	53	0	0	0	0	53	0.4
% of All EG1	100%	0%	0%	0%	0%	100%	
EG2 Acres	316	314	193	145	270	1,238	2.1
% of All EG2	25%	25%	16%	12%	22%	100%	
Other zones							
OS Acres	1	19	62	0	905	988	61.7
% of OS in Inventory	0%	2%	6%	0%	92%	100%	
R Acres	69	36	13	0	0	118	0.8
% of R in inventory	58%	30%	11%	0%	0%	100%	
C acres	3	0	0	0	129	132	13.2
% of C in Inventory	3%	0%	0%	0%	97%	100%	
EX Acres	3	0	0	0	0	3	0.5
% of EX in Inventory	100%	0%	0%	0%	0%	100%	

Assessed Property Value

The average assessed land value per square foot is about \$3-4 in the IH Heavy Industrial zones and about \$9-10 in the General Industrial zones. Average assessed land value is a surprisingly lower \$5 per square foot in the large-lot EG2 General Employment zone, which allows larger scale commercial development than in the industrial zones. Property improvements value per square foot is notably higher in the small-lot zones: ranging from \$31-33 per square foot in the IG1 and EG1 zones, compared to \$6-8 per square foot in the IH, IG2, and EG2 zones.

Zones	Average Value per Square Foot			Higher Valued Sites*				Improve- ments to Land Value Ratio
				Land Value		Improvements Value		
	Land	Improve- ments	Total	Sites	% of All Sites	Sites	% of All Sites	
Industrial zones								
IH Heavy Industrial	\$3.52	\$8.16	\$11.68	256	6%	293	7%	232%
IG1 General Ind., small lot	\$9.85	\$23.07	\$32.91	964	24%	796	20%	234%
IG2 General Ind., large lot	\$9.52	\$5.91	\$15.43	196	5%	455	11%	62%
General Employment zones								
EG1 General Emp., small lot	\$12.97	\$18.59	\$31.56	131	3%	104	3%	143%
EG2 General Emp., large lot	\$5.20	\$8.04	\$13.24	265	7%	271	7%	155%
Other zones*								
OS Open Space	\$1.57	\$0.11	\$1.68	1	0%	0	0%	7%
R Residential Zones	\$1.67	\$1.77	\$3.44	26	1%	45	1%	106%
C Commercial Zones	\$0.47	\$0.17	\$0.64	6	0%	4	0%	36%
EX Central Employment	\$13.86	\$16.62	\$30.47	5	0%	3	0%	120%
All Zones	\$6.58	\$7.24	\$13.82	1,812	45%	1,968	49%	110%

* Sites in district with value per square foot at least 120% of the average in all districts.

Industry Mix and Infrastructure Capacity

Assessment of industry mix by zone and infrastructure capacity for allowable uses by zone has been postponed to a second phase of the inventory. To relate industry mix to land area and specific zones, a more accurate analysis can be developed following the database refinements recommended in Chapter 1, including adjustments to employer locations and site boundaries (e.g., removing fragments and right-of-way), as well as field review. Further analysis of infrastructure capacity and needs within a second phase could also be applied to a comparison of base zones.

Site Constraints

Environmental Constraints by Zone

Among the large-lot industrial and employment zones, the proportion of land affected by the composite of environmental constraints analyzed in the inventory (i.e., floodplain, 10 percent or greater slopes, wetlands, and/or environmental protection zones) is 37 percent in the IH zones, 28 percent in the IG2 zones, and 33 percent in the EG2 zones. Floodplain is the most prevalent environmental constraint in these zones, ranging from 27 percent of the IH zones to 17 percent of EG2 acreage. Much less of the land in the small-lot zones is affected by environmental constraints: 9 percent of the IG1 zones is affected by the composite environmental constraints; and 12 percent of the EG1 zones.

Constraint	IH		IG1		IG2		EG1		EG2	
	Acres	% of All IH Acres	Acres	% of All IG1 Acres	Acres	% of All IG2 Acres	Acres	% of All EG1 Acres	Acres	% of All EG2 Acres
Environmental Protection Zone (p)	118	2%	0	0%	289	4%	0	0%	141	11%
Greenway Natural Zone (n)	33	1%	0	0%	0	0%	0	0%	13	1%
100 Year Floodplain	1,388	24%	14	2%	1,604	21%	2	4%	165	13%
1996 Flood Inundataion Area	176	3%	14	2%	70	1%	0	1%	51	4%
Title 3 Wetlands	182	3%	0	0%	257	3%	0	0%	92	7%
10% or Greater Slope	561	10%	50	7%	562	7%	5	10%	176	14%
Composite Constraints (all of above)	2,113	37%	69	9%	2,166	28%	6	12%	410	33%
Total Acreage in Zone*	5,669	100%	761	100%	7,659	100%	53	100%	1,238	100%

* For sites in more than one zone, the predominant zone was used for the above calculations and total acreage.

Proximity to Housing by Zone

Portland's industrial sanctuary zones are relatively effective at separating industrial and residential uses: 96 percent of the land in IH zones is more than 500 feet from the nearest residential zone, 87 percent of the IG2 lands, and 70 percent of the small-lot IG1 zones. Similarly, 66 percent of the land in Portland's large-lot employment zone (EG2) is more than 500 feet from a residential zone. However, in the small-lot EG1 zone, 84 percent of the land is within 500 feet of a residential zone, posing significant constraints for development of general industrial uses with off-site impacts.

Distance in Feet	IH		IG1		IG2		EG1		EG2	
	Acres	% of All IH Acres	Acres	% of All IG1 Acres	Acres	% of All IG2 Acres	Acres	% of All EG1 Acres	Acres	% of All EG2 Acres
<200	11	0%	13	2%	50	1%	26	49%	71	6%
200- 500	192	3%	218	29%	936	12%	19	35%	344	28%
500+	5,467	96%	530	70%	6,673	87%	8	16%	823	66%
Total Acreage in Zone*	5,669	100%	761	100%	7,659	100%	53	100%	1,238	100%

* For sites in more than one zone, the predominant zone was used for the above calculations and total acreage.