



Economic Opportunities Analysis Economic Development Policy

Portland Planning and Sustainability Commission
May 12, 2015



Bureau of Planning and Sustainability
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Goal 9 EOA

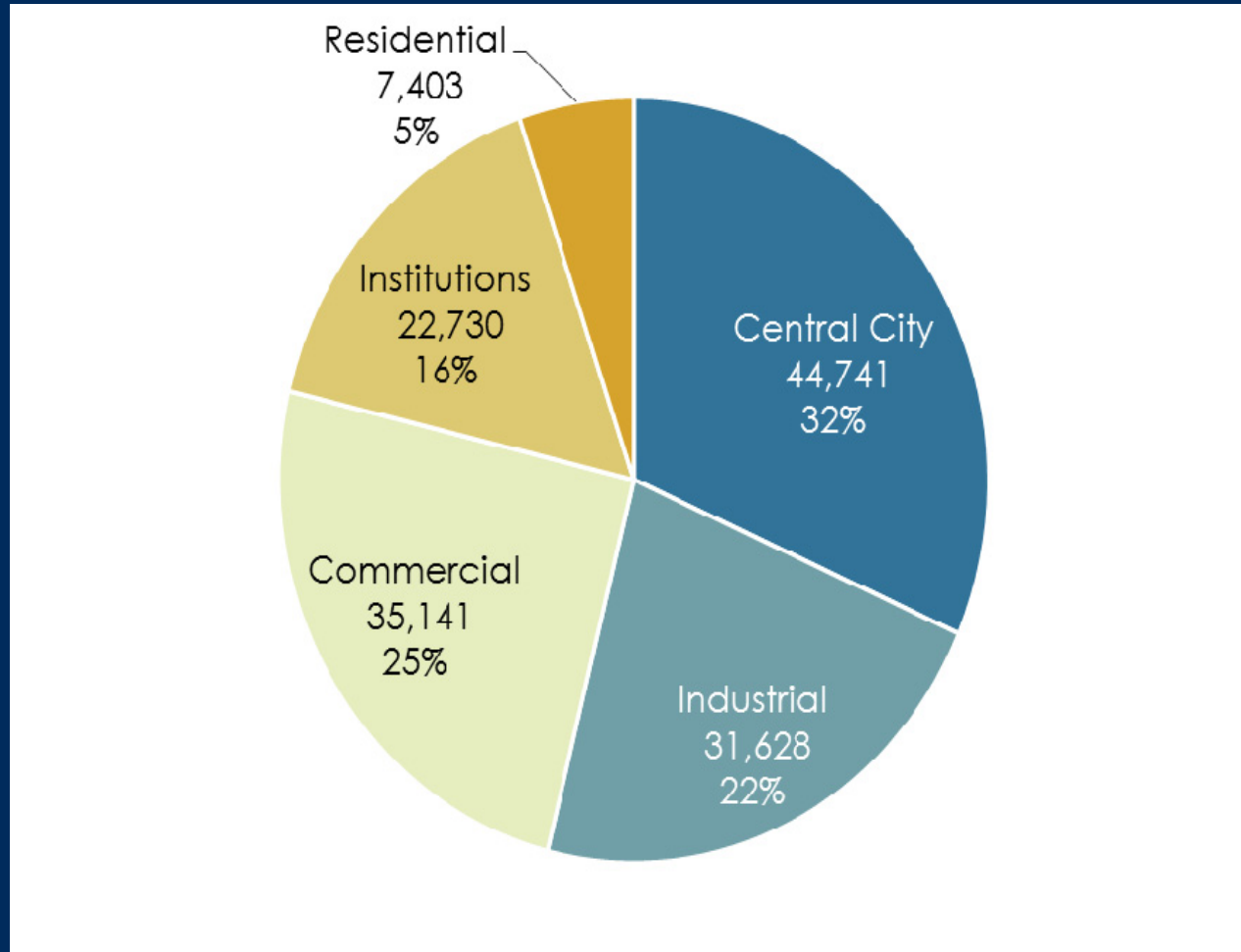
Designate land suitable to meet identified needs.

1. Employment Growth Forecast (Demand)
2. Land Development Capacity (Supply)

Reconciliation – Surpluses and Shortfalls



2035 Employment Forecast



Employment Land Need Reconciliation

	Demand		Supply	
	Added Jobs	Land (acres)	Proposed Plan	Surplus/ Deficit
Central City	44,740	150	390	240
Industrial	31,630	1,700	1,792	92
Commercial	35,140	690	1,492	802
Institutions	22,730	370	522	152
Total	141,640	2,910	4,064	



Industrial Land Needs

Components of Land Need:

1. 32,000 jobs

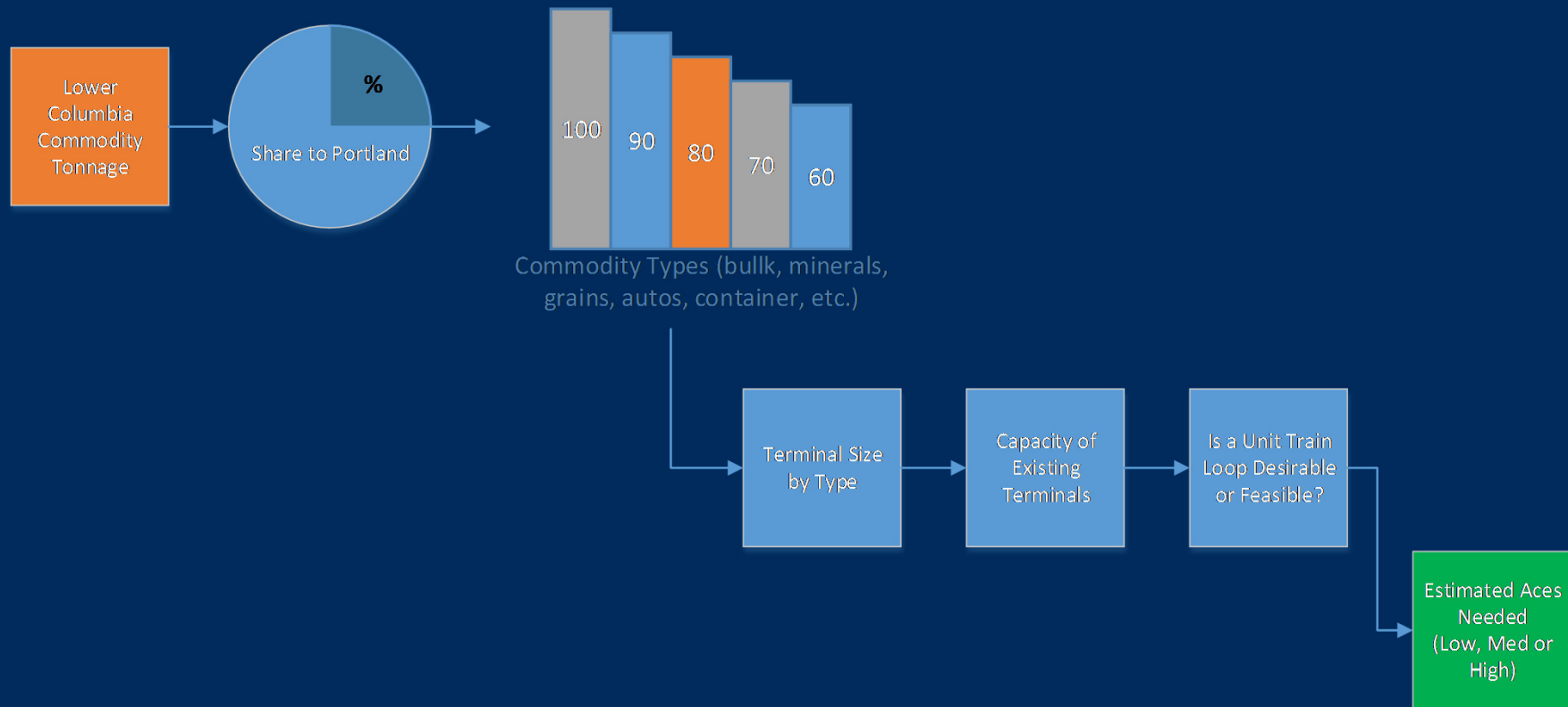
2. Traded Sector Facilities

Marine Terminal Commodity Forecast

- Volume – Medium/Low
- Facility – Compact/Modern/Rail Loop



Commodity Forecast



2040 Portland Marine Terminal Cargo Volume Forecast

(metric tons)

		2040 Cargo Volume (public and private terminals)		
Cargo Type	Existing Terminals	Low	Medium	High
Automobiles	889,000	1,076,000	1,206,000	1,336,000
Containers	3,999,000	2,162,000	2,583,500	3,005,000
Breakbulk	2,350,000	1,132,000	1,242,000	1,352,000
Grain	7,100,000	6,686,000	9,078,000	11,470,000
Dry Bulk	12,200,000	10,278,000	14,093,500	17,909,000
Liquid Bulk	8,280,000	6,912,000	7,461,500	8,011,000
TOTAL	34,568,000	28,246,000	35,664,500	43,083,000



2040 Potential Portland Marine Terminal Capacity Shortfalls

	2040 Forecasted Cargo Volume (public and private terminals)		
Cargo Type <i>metric tons</i>	Low	Most Likely	High
Automobiles	(187,000)	(410,000)	(730,000)
Containers	-	-	(1,120,000)
Breakbulk	-	-	-
Grain	-	(2,390,000)	(4,370,000)
Dry Bulk	-	(2,960,000)	(10,949,000)
Liquid Bulk	-	-	-
TOTAL	(187,000)	(5,760,000)	(17,169,000)



2040 Marine Terminal Land Need for Medium Cargo Forecast

Cargo Type Metric Tons	Capacity Shortfall	Acres Needed		
		Compact	Modern	Modern w / rail
Automobiles	(410,000)	120	270	270
Containers	-			
Breakbulk	-			
Grain	(2,390,000)	30	50	100
Dry Bulk	(2,960,000)	20	70	100
Liquid Bulk	-			
TOTAL	(5,760,000)	170	390	470



Marine Terminal Demand

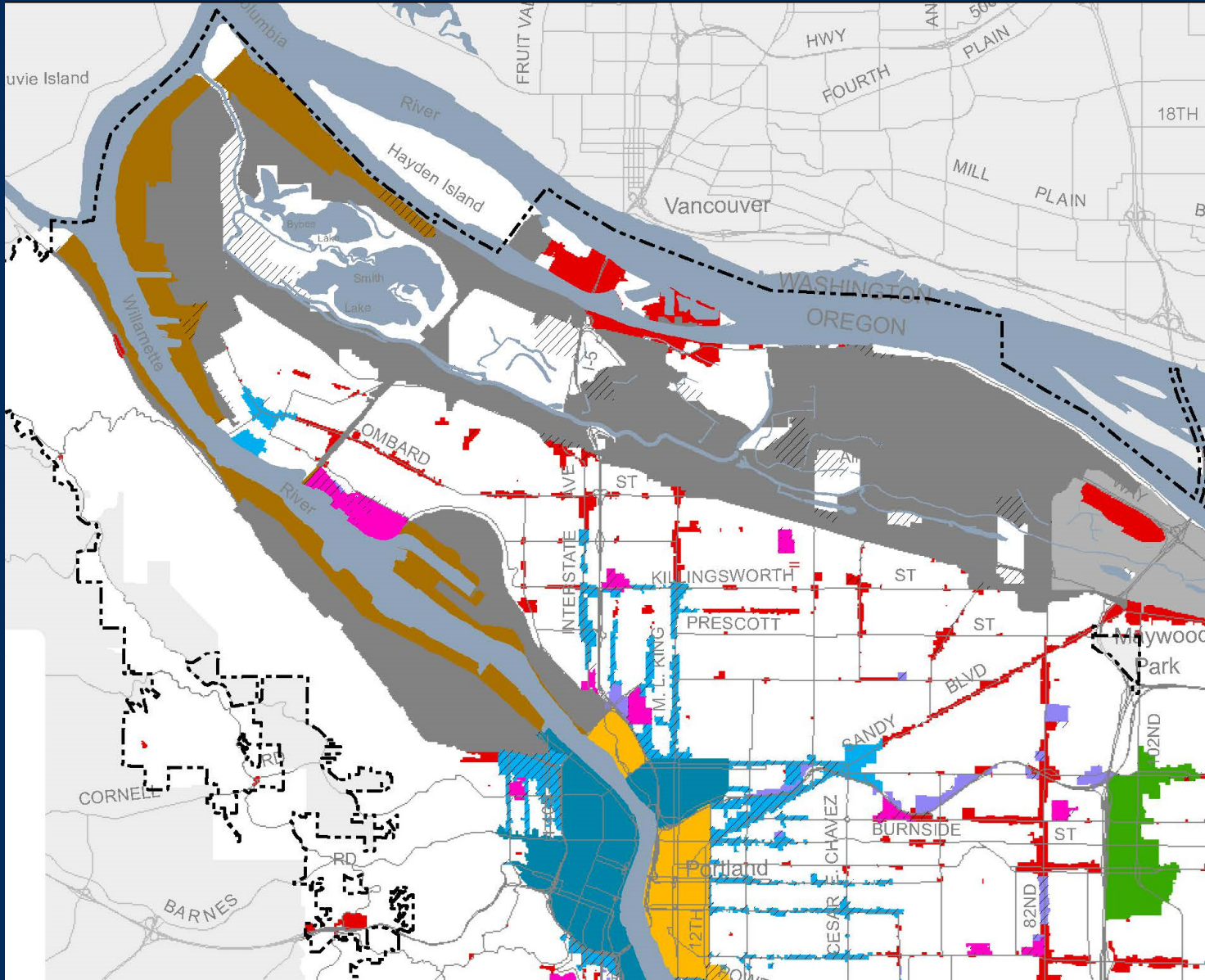
Cargo Volume Forecast	Terminal Land Need	Harbor Access Land Shortfall
1. Low	Modern	-38 acres
2. Medium	Compact	-48 acres
3. Medium	Modern w/rail loop	-268 acres



Industrial Land Capacity

Proposed IL/WH Strategies	Capacity (acres)
Industrial land retention	50
Brownfield redevelopment	124
Industrial land intensification	192
Airport golf courses	123





West Hayden Island

- Map designation as Rural Farm/Forest
- Policy 6.41 provides guidance for future annexation
- Not included in the BLI – Industrial Land Supply because it is not expected to be operational by 2035.



WHI Policy Options

1. Retain the Farm/Forest map designation, and DELETE draft Policy 6.41.
2. Retain the Farm/Forest map designation, and amend the policy to add more about community impacts.
3. Retain the Farm/Forest map designation, and amend policy to delete bullets that reference 300/500 acre split.
4. Change the map to designate WHI as open space and delete the policy.



Industrial Land Retention Policy

Policy 6.38 Prime industrial land retention. Protect the multimodal freight-hub industrial districts at the Portland Harbor, Columbia Corridor, and Brooklyn Yard as prime industrial land (see Figure 6-1) that is prioritized for long-term retention:

- Prohibit quasi-judicial Comprehensive Plan Map amendments
- Limit conversion of prime industrial land
- Identify how regulations affect the capacity
- Strive to offset the reduction of development capacity
- Limit the use of prime industrial land for siting of parks, schools, large-format places of assembly, and large-format retail sales
- Promote efficient use of freight hub infrastructure and prime industrial land by limiting non-industrial uses that do not need to be located in the prime industrial area.



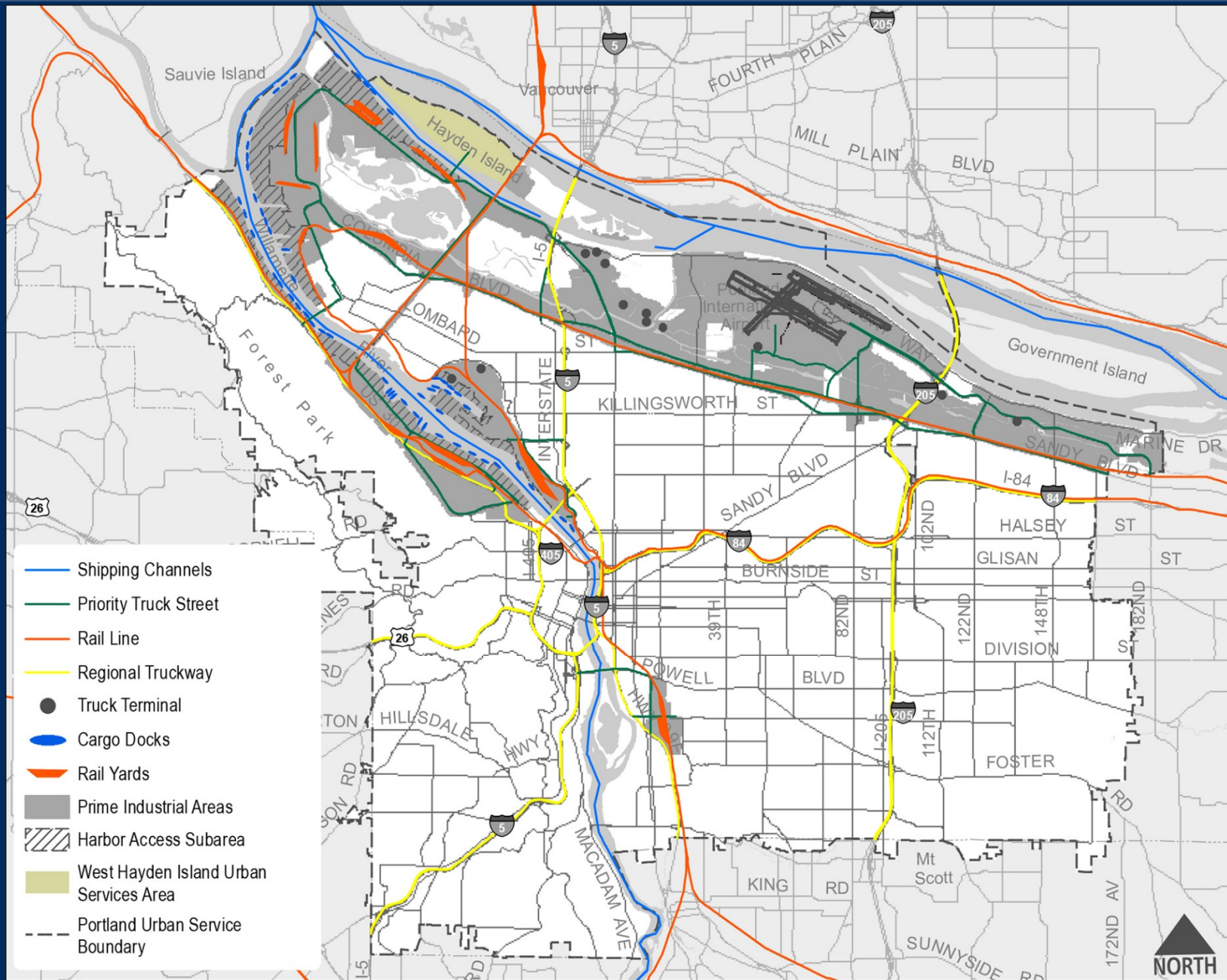
East Columbia NA Map Change

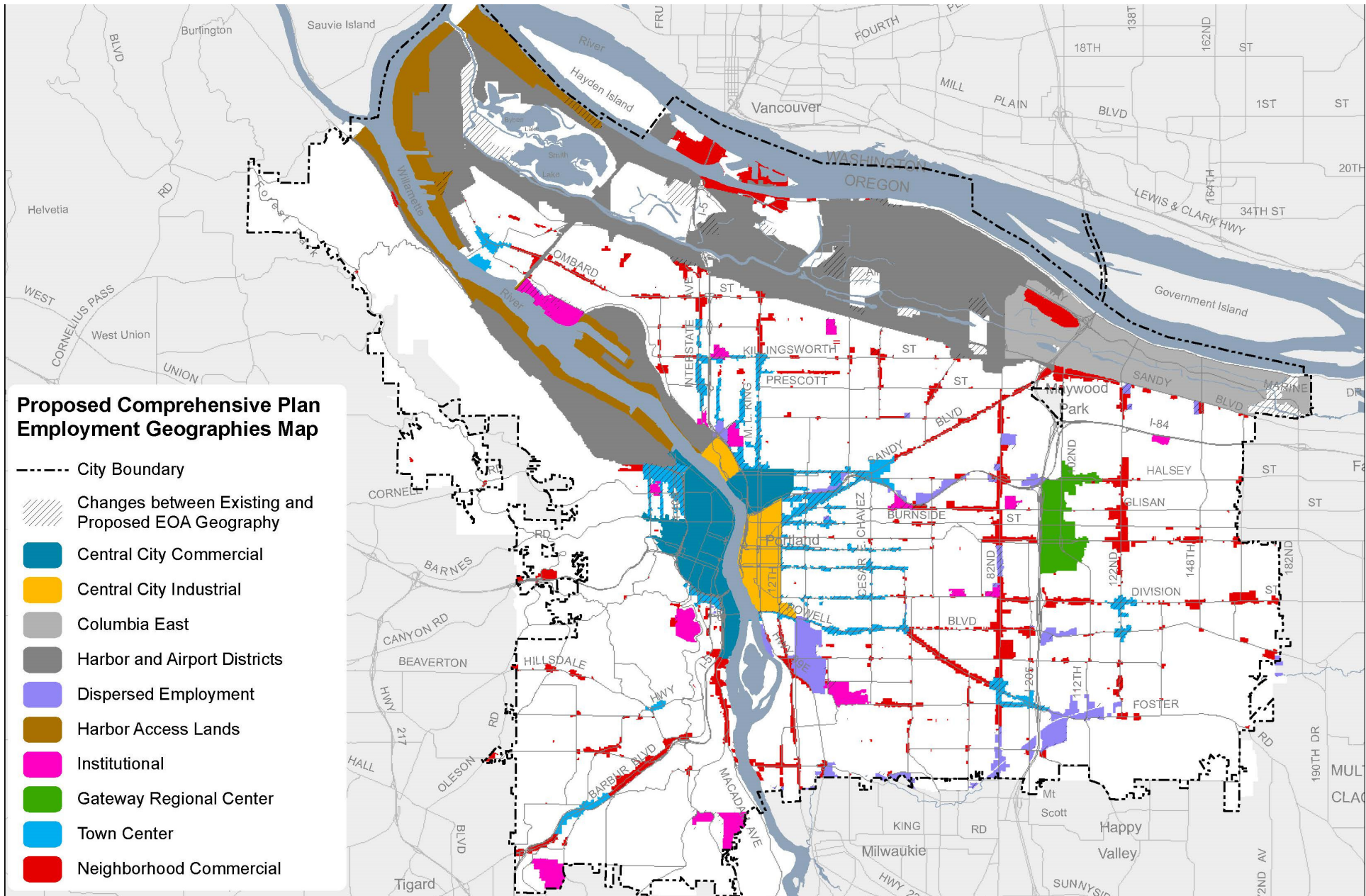


Other Issues

- **Accuracy of Employment Forecasts**
- **Employment to Open Space Map Changes**
- **Campus Institution Zoning Code Change**







Proposed Comprehensive Plan Employment Geographies Map

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

December 18, 2014

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

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

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

Proposed Map Changes for Airport Area Golf Courses

