

Developable Land Shortage

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American Association of Port Authorities
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Outline

- Background
- Key Issues
- Takeaways



Port of Portland Mission

To enhance the region's economy and quality of life by providing efficient cargo and air passenger access to national and global markets, and by promoting industrial development.



The Port of Portland

4 Marine Terminals



3 Airports



5 Business Parks



Marine Terminals - The Region's Gateway

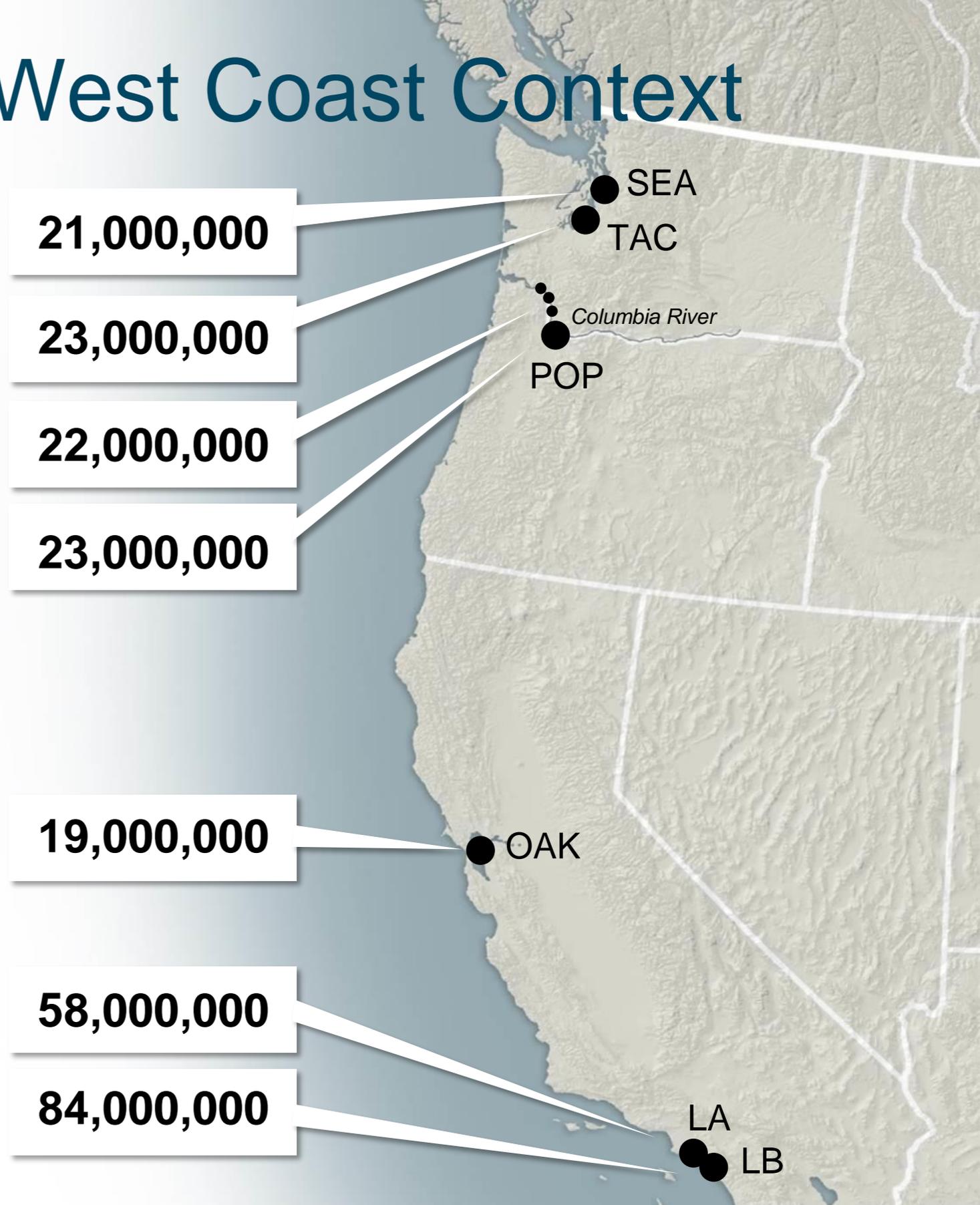
- Served by 2 rail lines, upriver barge system, and 2 major interstate highways
- Diverse cargo: Bulk, autos, mineral bulk, break-bulk, containers



Marine Business - West Coast Context

- **23 million tons** moved through Portland Harbor in 2014
- **22 million tons** moved through other lower Columbia River ports (international only, 2013)
- **\$13 billion** value of tonnage trade in Portland Harbor (2013)

The Portland Harbor tonnage includes both public and private terminals. The Port of Portland terminals represent about half of the total. The loss of container service that occurred in 2015 would reduce the overall tonnage by about 1.8 million tons.



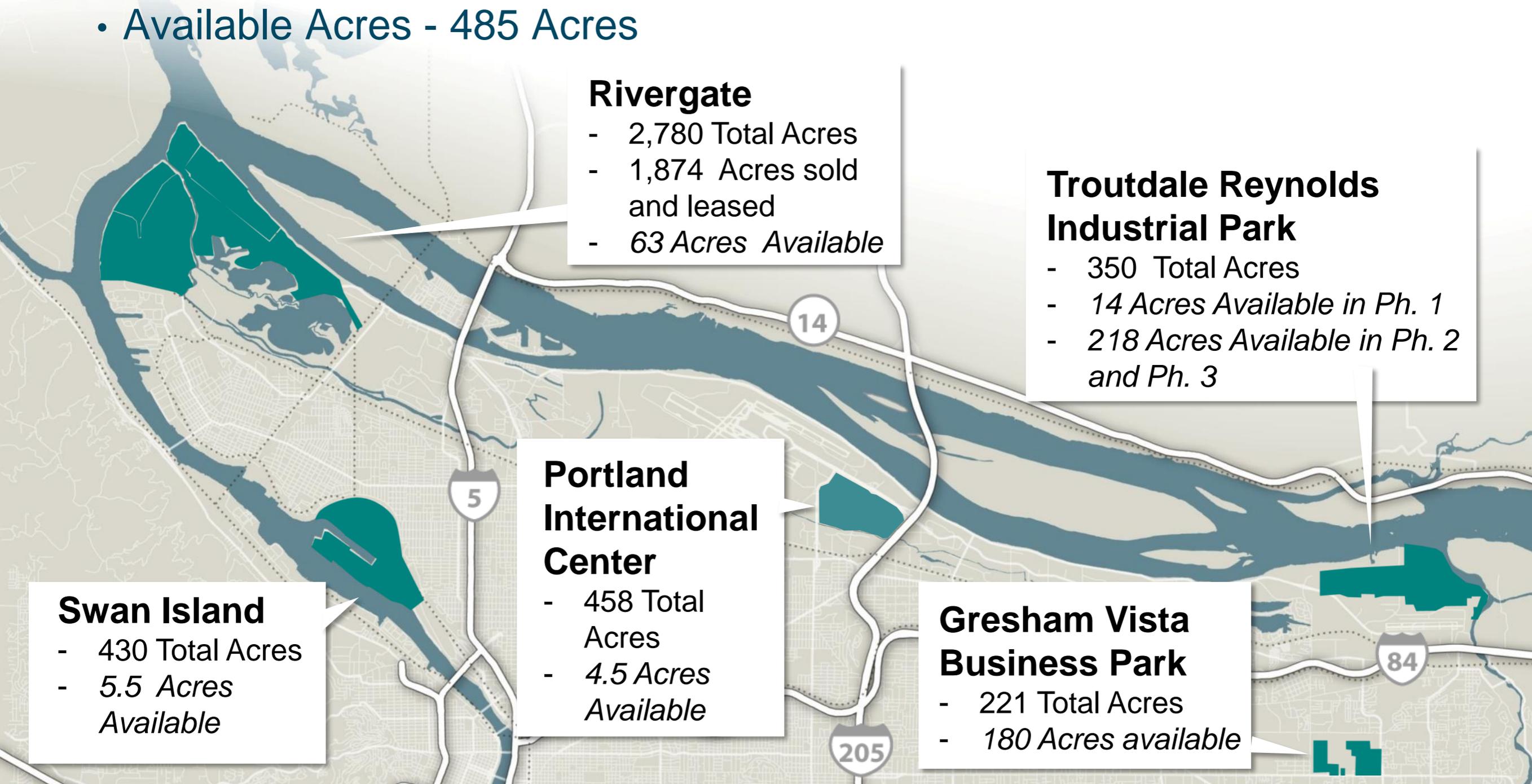
Marine Business – 2014 Rankings

- #1 mineral bulks port on the U.S. West Coast
- #1 wheat export gateway in the U.S.
- #3 largest grain export region in the world
- #3 largest export tonnage port on the U.S. West Coast
- #4 largest auto import gateway on the U.S. West Coast and eighth largest in the U.S.
- #3 largest export auto gateway on the U.S. West Coast



Industrial Properties Land Inventory

- Total Acres - 4,239 Acres
- Available Acres - 485 Acres



Key Issues

- Marine expansion limited without additional land
- Local government support
- Established role as public developer
- Patient capital



Land Entitlement Challenges

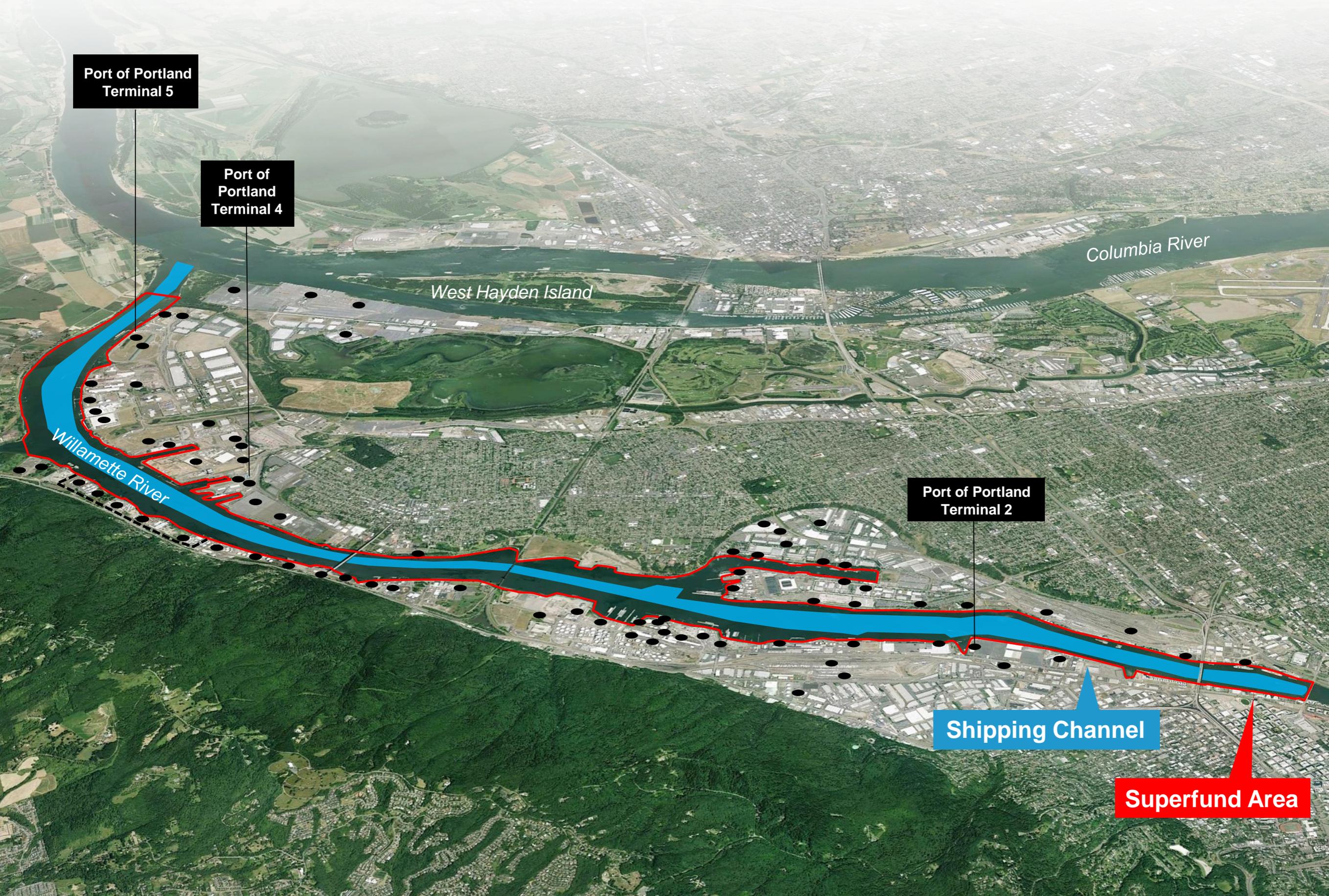


T6 Undeveloped
Land

West Hayden
Island



Harbor Land Impacted by Superfund



Port of Portland
Terminal 5

Port of
Portland
Terminal 4

West Hayden Island

Columbia River

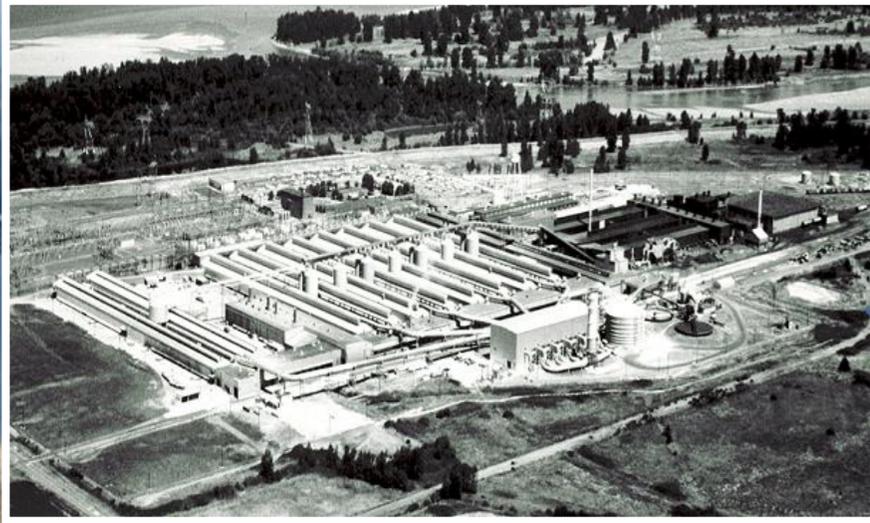
Willamette River

Port of Portland
Terminal 2

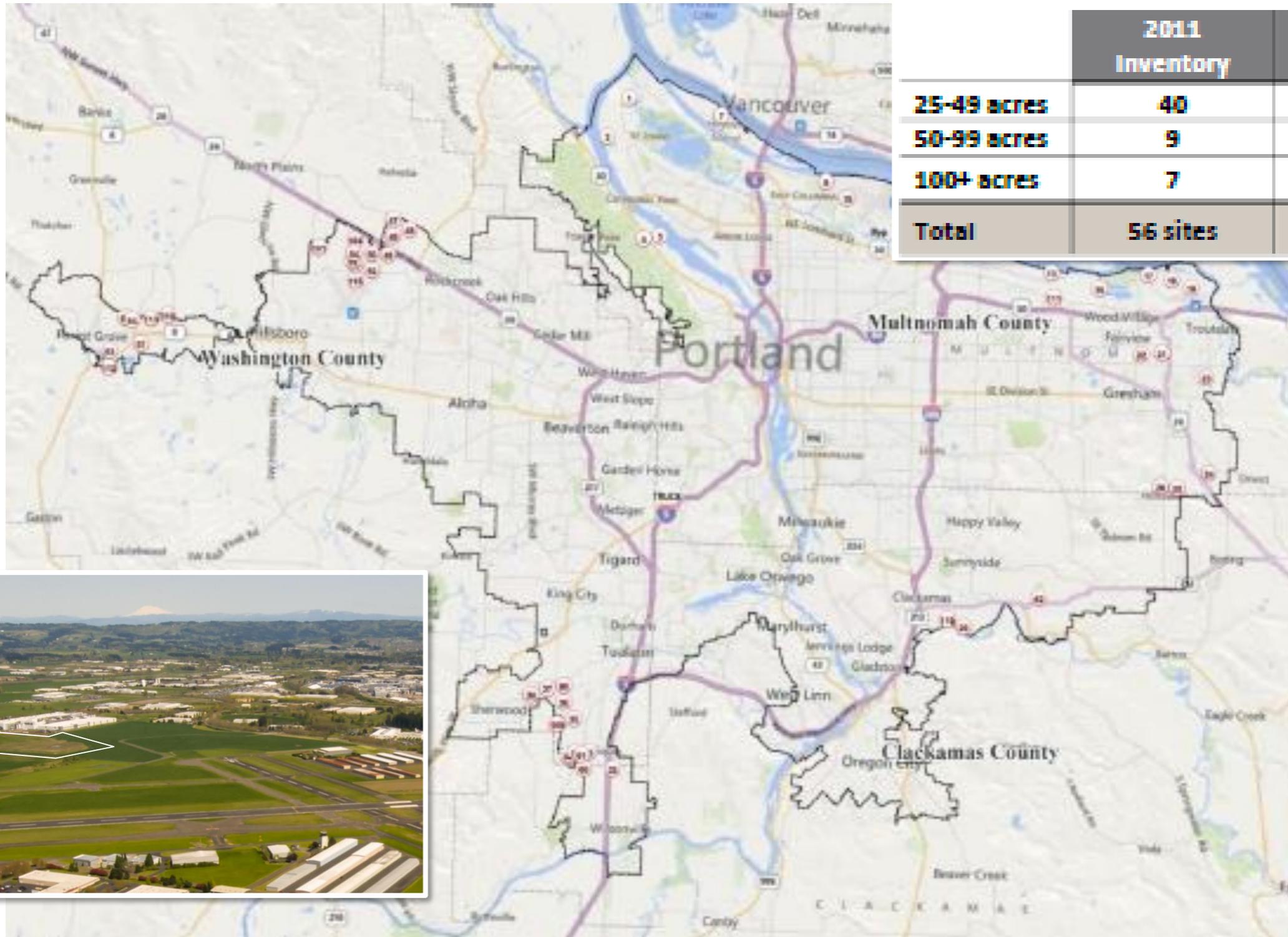
Shipping Channel

Superfund Area

Troutdale Reynolds Industrial Park



Potential Land Acquisitions



	2011 Inventory	2014 Inventory
25-49 acres	40	39
50-99 acres	9	10
100+ acres	7	5
Total	56 sites	54 sites



Takeaways

- Industrial land development supports regional economy and marine/aviation business
- Success requires alignment with community
- Role of Port as “patient industrial developer” gaining traction
- Industrial brownfield redevelopment requires public funding
- Potential partnerships with other ports





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