



600 NE Grand Ave.  
Portland, OR 97232-2736

# Metro Policy Advisory Committee (MPAC)

## agenda

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Wednesday, November 8, 2023

5:00 PM

<https://zoom.us/j/95889916633> (Webinar

ID: 958 8991 6633)

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### 1. Call To Order, Declaration of a Quorum & Introductions (5:00 PM)

Please note: This meeting will be held online. You can join the meeting on your computer or other device by using this link: <https://zoom.us/j/95889916633> or by calling +1 669 900 6128 or +1 877 853 5257 (Toll Free)

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### 2. Public Communication on Agenda Items (5:05 PM)

Public comment may be submitted in writing and will also be heard by electronic communication (video conference or telephone). Written comments should be submitted electronically by mailing [legislativecoordinator@oregonmetro.gov](mailto:legislativecoordinator@oregonmetro.gov). Written comments received by 4:00 pm on the Wednesday before the meeting will be provided to the committee prior to the meeting.

Those wishing to testify orally are encouraged to sign up in advance by either: (a) contacting the legislative coordinator by phone at 503-813-7591 and providing your name and the item on which you wish to testify; or (b) registering by email by sending your name and the item on which you wish to testify to [legislativecoordinator@oregonmetro.gov](mailto:legislativecoordinator@oregonmetro.gov). Those requesting to comment during the meeting can do so by using the "Raise Hand" feature in Zoom or emailing the legislative coordinator at [legislativecoordinator@oregonmetro.gov](mailto:legislativecoordinator@oregonmetro.gov). Individuals will have three minutes to testify unless otherwise stated at the meeting.

### 3. Council Update (5:10 PM)

### 4. Committee Member Communication (5:15 PM)

### 5. Information/Discussion Items (5:20 PM)

- 5.1 Urban Growth Management discussion: Overview of approach to estimating UGB growth capacity (5:20 PM)

[COM](#)

[23-0740](#)

Presenter(s): Ted Reid (he/him), Metro

Attachments: [MPAC Worksheet](#)

5.2 Regional Freight Delay and Commodities Movement Study  
(5:50 PM)

[COM](#)  
[23-0745](#)

Presenter(s): Tim Collins, Metro

Attachments: [MPAC Worksheet](#)

**6. Adjourn (7:00 PM)**

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ការការពារសិទ្ធិពលរដ្ឋរបស់ ។ សំរាប់ព័ត៌មានអំពីកម្មវិធីសិទ្ធិពលរដ្ឋរបស់ Metro ឬដើម្បីទទួលបានការបណ្តឹងរើសអើងសូមទូរស័ព្ទទូរស័ព្ទសេវាកម្មរបស់ [www.oregonmetro.gov/civilrights](http://www.oregonmetro.gov/civilrights)។

បើលោកអ្នកត្រូវការអ្នកបកប្រែភាសានៅពេលអង្គប្រជុំសាធារណៈ សូមទូរស័ព្ទមកលេខ 503-797-1700 (ម៉ោង 8 ព្រឹកដល់ម៉ោង 5 ល្ងាច ថ្ងៃច័ន្ទ) ប្រាំពីរថ្ងៃ មុនថ្ងៃប្រជុំដើម្បីអាចឲ្យសេវាកម្មរបស់លោកអ្នក ។

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**2023 MPAC Work Program**

***As of 10/25/2023***

*Items in italics are tentative*

<b><u>November 08, 2022</u></b>	<b><u>December 13, 2022</u></b>
<ul style="list-style-type: none"> <li>• Urban Growth Management discussion: Overview of approach to estimating UGB growth capacity(Ted Reid (he/him), Metro and ECONorthwest staff; 30 min)</li> <li>• Freight Commodity Study (Tim Collins, Metro)</li> </ul>	<ul style="list-style-type: none"> <li>• <i>Draft Sherwood West concept plan (city presents); update on BLI (Metro staff)</i></li> <li>• <i>C2P2 Update</i></li> <li>• <i>Housing Update</i></li> </ul>

**5.1 Urban Growth Management discussion: Overview of approach to  
estimating UGB growth capacity**  
*Information/Discussion Items*

Metro Policy Advisory Committee  
Wednesday, November 8th, 2023

# MPAC Worksheet

**Agenda Item Title:** 2024 urban growth management decision: overview of approach for estimating regional growth capacity

**Presenters:** Ted Reid, Principal Regional Planner

**Contact for this worksheet/presentation:** Ted Reid

## **Purpose/Objective**

The purpose of this item is to continue MPAC's engagement in growth management topics so that it is prepared to advise the Metro Council on its regional growth management decision in late 2024.

Under state law, Metro must assess – at least every six years – whether there is a regional need to expand the urban growth boundary (UGB). UGB expansions are only allowed if there is a demonstrated regional need for more UGB capacity to accommodate anticipated household or job growth (demand), which Metro assesses using a peer-reviewed forecast.

A core question that Metro must answer is how much growth capacity currently exists in the UGB. When determining growth capacity, state law instructs Metro to consider vacant lands as well as developed lands that may provide space for redevelopment or infill. Past analyses show that most of our region's housing and job growth occurs through redevelopment and infill of land inside the UGB.

At the October 25 MPAC meeting, staff will describe the methods that they are using to estimate regional growth capacity, including methods for accounting for environmental constraints and market factors. For this analysis, staff has engaged consultant expertise to develop a better understanding of the likelihood of development, redevelopment and infill on lands already inside the UGB. Staff will also describe review opportunities for these methods and results.

## **Outcome**

MPAC members become more familiar with key concepts related to estimating regional growth management capacity and have opportunities to share their perspectives on this work.

## **What has changed since MPAC last considered this issue/item?**

In 2023, MPAC has discussed several topics related to the 2024 growth management decision, including development outcomes in past UGB expansion areas, middle housing potential, gentrification and displacement trends, and the engagement plan for the 2024 decision. This will be MPAC's first discussion of this specific topic.

## **What packet material do you plan to include?**

None. PowerPoint available at the meeting.

**5.2 Regional Freight Delay and Commodities Movement Study**

*Information/Discussion Items*

Metro Policy Advisory Committee  
Wednesday, November 8th, 2023

# MPAC Worksheet

**Agenda Item Title:** Regional Freight Delay and Commodities Movement Study Update

**Presenters:** Tim Collins, Senior Transportation Planner (Metro)

**Contact for this worksheet/presentation:** Tim Collins, at [tim.collins@oregonmetro.gov](mailto:tim.collins@oregonmetro.gov)

## Purpose/Objective

The purpose of the study is to evaluate the level and value of commodity movement on the regional freight network and to have a policy framework for commodity movement in the region; with a history of how COVID-19 economic impacts have affected freight truck travel, e-commerce and delivery services.

The main objectives of the study are to:

- Identify which mobility corridors are carrying the highest volumes and highest values of commodities;
- Explore how increases in e-commerce are impacting the transportation system and regional economy;
- Examine how congestion and unreliability on the regional transportation system impacts commodity movement;
- Make recommendations for future regional policy and planning efforts to improve commodity movement; while addressing equity, safety and climate when applicable.

## Outcome

Inform MPAC on e-commerce trends and impacts, regional level findings on commodities movement, existing freight mobility and reliability issues, and answers to the freight policy questions. Provide answers to questions and receive input from MPAC about the study.

## What has changed since MPAC last considered this issue/item?

This is the first-time staff have provided a presentation on the study to MPAC.

## What packet material do you plan to include?

There will be a PowerPoint presentation that will be provided to MPAC.

Materials following this page were distributed at the meeting.

November 8, 2023

METRO REGIONAL CENTER  
600 NW Grand Ave.  
Portland, Oregon 97232-2736  
Tel: (503) 797-1700  
Fax: (503) 797-1797  
Website: [www.oregonmetro.gov/reserves](http://www.oregonmetro.gov/reserves)

**SUBJECT: Portland Metro Urban Growth Management Discussion – UGB Growth Capacity  
Metro Policy Advisory Committee (MPAC) Meeting November 8, 2023**

References: 1) Bedsaul/Vincent Consulting, LLC - Summary Report, Boring Option 1F Area, dated Development Possibilities, Comprehensive Plan, date January 13, 2020  
2) D. Anders Testimony, Portland Metro Urban & Rural Reserves – Boring Option 1F Urban Reserves Metro Jurisdiction, dated November 19, 2015  
3) D. Anders Testimony, Portland Metro Urban & Rural Reserves VISION 2010-2050/60 Cor 4 Reserves – Shaping the Next 50 Years, Open House & Hearing, dated January 14, 2010

Dear Ted Reid, Metro Principal Regional Planner:

As a landowner, business owner and Clackamas County resident who recognizes needs in the area for industrial and/or commercial land, I would like to propose for Urban Growth Boundary (UGB) consideration the Boring Option 1F area, located in Boring, Oregon.

This is a unique area of land with excellent transportation infrastructure access via Highway 26 and Highway 212. There are several businesses and commercial non-conforming land uses in this area. The regional and local area could be well served if the Option 1F area is brought into the Urban Growth Boundary with the ability to change zoning, to expand the employment capacity, and add to the range of business services offered to the area.

We have made additional improvements that can facilitate growth to support community needs and can provide this information upon request.

Sincerely,

\_\_\_\_\_/s/\_\_\_\_\_  
Dee A. Anders  
(202) 579-8442  
[danders.trade.law@att.net](mailto:danders.trade.law@att.net)  
Boring, Oregon

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Dee Anders & John Chambers

Chambers Motors

30357 SE Highway 212

Boring, Oregon 97009

January 13, 2020

Subject: Summary Report on assessing the feasibility of development possibilities and Clackamas County Comprehensive Plan and Zone Map Amendment approval at 30155 SE Highway 212, Boring Oregon. (Tax Lot 200, Map 14E31D)

Dear Dee & John:

As requested by Dee, I am writing this letter to summarize my work so far on the above-mentioned project. This summary is based upon the following:

1. My review of case file information provided by you, a site visit, and conversations with Dee Anders.
2. A review of relevant Metro documents, Clackamas County ordinance and research of the Clackamas County Zoning and Development Ordinance.

To recap my work thus far, here is what has been concluded:

1. The site is currently zoned EFU, (Exclusive Farm Use), as are other adjacent lots. In essence this current zone makes all of the current development pre-existing, non-conforming uses, which would require a land use approval to expand/change the current uses. For multiple reasons, there is no reason for you to pursue this development option, given the fact that in June, 2010 Metro brought the site and surrounding lands into the Urban Reserve.
2. I have reviewed the relevant pages from Metro's January, 2010 Urban Reserve Phase 4 Public Comment Report, Clackamas County's 4/21/2010 Revised Findings for Clackamas County Urban and Rural Reserve, and the 5/11/2017 Clackamas County Board of Commissioner's Ordinance adopting the Revised Findings for Clackamas County Urban and Rural Reserve. Relevant pages from the above-stated documents are attached to this report. The urban reserve area surrounding your site is known as the Boring/Hwy 26 Urban Reserve Area, which forms a triangular area of land between Hwy 212 to the south, Hwy 26 to the east, and SE 282<sup>nd</sup> to the west. "Employment land uses", and "employment capacity" were the phrases consistently applied to this urban reserve area throughout these documents. In planning parlance, these phrases translate to commercial and retail uses, because those land uses generate the most employees/square foot of land devoted to those use. If Metro felt otherwise, they would have labeled this area as

industrial land uses, or low density manufacturing, because those uses generate a much lower rate of employees/square foot of land devoted to those uses. Therefore, based on the above, Metro and Clackamas County want this area devoted to some form of commercial zoning.

3. I have researched the current Clackamas County Zoning and Development Ordinance to determine which group of commercial zones would provide the broadest range of permitted and/or conditional commercial and retail uses. Based on that research, I have concluded that Community Commercial, (C-2), Retail Commercial, (RTL), Corridor Commercial, (CC), General Commercial, (C-3), and Planned Mixed Use, (PMU), provide the broadest range of uses with the fewest limitations on getting those use approved. You and your project team should analyze these zones and determine which one is the best fit for the site. Once that is decided, then I recommend applying a Clackamas County Pre-Application Conference to discuss the County required Comprehensive Plan and Zone Map Amendment process. I have included relevant pages from the Zoning and Development Ordinance. Note that Clackamas County may have it's own idea as to which commercial zone is the best fit for the site, and there is no guarantee that you and the County will see things the same way.

At this juncture, I will reiterate that I will not be able to see this Comprehensive Plan and Zone Map Amendment process through to the end. My goal was to analyze the current situation and make recommendations on how you should proceed. You have assembled a good project team that is definitely capable of carrying you through to the end of the process.

Sincerely,



Bruce Vincent

Bedsaul/Vincent Consulting, LLC

November 19, 2015

METRO REGIONAL CENTER  
600 NE Grand Avenue  
Portland, Oregon 97232  
Tel: (503) 797-1700  
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Website: [www.oregonmetro.gov/reserves](http://www.oregonmetro.gov/reserves)

**SUBJECT: Portland Metro Urban & Rural Reserves – Boring Option 1F Urban Reserves  
Metro Jurisdiction**

Dear Mr. Tom Hughes, Metro Council President, and Metro Council Members

Thank you for Metro's hard work and diligence to improve the region and communities over the years. As a stakeholder in the Boring Option 1F area I submit the following positions:

OPPOSE:

1. Oppose House Bill (HB) 2640 which proposes to withdrawal territory within an area of Boring mapped by the Boring Community Planning Organization (CPO) from Metro Jurisdiction.

SUPPORT:

2. Exhibit B to Metro Council Ordinance No. 11-1255, Reasons for Designation of Urban and Rural Reserves, Approved, August 14, 2012.
3. Metro Revised Findings for Clackamas County Urban and Rural Reserves, April 21, 2011.

Today I share my perspective along with my parents John and Sharon Chambers. My father could not be here but he signed this letter to show support. I grew up in the Boring Oregon Option 1F area, attended grade school and high school here. **My parents opened a business in Boring and have served the community as an employer for over 50 years with Chambers Motor Company.** <http://chambersmotorco.com/>

This effort to testify is based on passion for my hometown and hope that it will offer growing promise for residents into the future. I grew up picking raspberries and strawberries in the summer and masking trucks before painting for Chambers Motor Company. As a young adult I did not envision where my career, work ethic, and opportunity would someday take me.

I find the message promoted by the Boring CPO "Keep Boring Boring" disheartening. Since earning my college degree from Pepperdine University I have had the opportunity to support space and national defense missions ranging from servicing the Hubble Space Telescope (and meeting 6 of the seven astronaut crew) to negotiating Air Force Space Command contracts for protected satellite communications to protect the United States President and the American Warfighter.

You see, I believe that the next generation of Boring residents need to become aware of, and be inspired by the many important global missions that are being carried out by hard working, value oriented Americans today. As the Option 1F area becomes land for employment growth, I envision an organization where youth can learn about NASA Science, Technology, Engineering & Math (STEM) and

other programs, as well as a satellite simulation control center where youth can learn to fly satellites in space. Exposure to the many career paths available will afford rural youth new opportunities.

When Metro designated the Boring Option 1F area Urban Reserves it was a step in the right direction. The Boring CPO HB 2640 acting to remove Boring from Metro seems like a step in the wrong direction. Certainly we grow beautiful trees that grace the landscape, but we can also grow value driven youth that will write code for GPS satellite systems, design electronics, develop and draw specifications for future medical devices and become engineers and scientists as well as farmers. I understand Boring may never become a major tech center, but Boring does not need to remain boring. I don't believe that goal is in the community, region, or national interests.

My parents John & Sharon Chambers sold land to **Western Bus Sales** <http://westernbus.com/> and in the last year or two Western Bus tried purchasing more land from my parents to expand to their property site footprint before eventually constructing a new building to service buses and RVs on their own land. The only land my parents had available was zoned Farm Use -EFU which would not allow for such expansion. The Option 1F area does have mixed use, industrial, employment and vibrant commercial activity. More space is needed for business and employment in the Option 1F area.

Metro Revised Findings for Clackamas County Urban and Rural Reserves, April 21, 2011.

*"Conclusions and Analysis:* Designation of the Boring Area as an Urban Reserve is consistent with OAR 660-027. The Boring Urban Reserve provides one of Clackamas County's few identified employment land opportunities. The larger, flat parcels in Area 1F are suitable as employment land. This area is served by St. Hwy. 26 and St. Hwy 212, transportation facilities that have been identified by ODOT as having additional capacity. Development of this area for employment uses also would be a logical complement to the Springwater employment area in Gresham." P-7

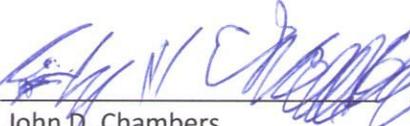
When land is zoned 401 Exclusive Farm Use District (EFU) essentially the land is limited to farm related use. As supported by Exhibit B to Metro Council Ordinance No. 11-1255 the Option 1F area is one of Clackamas County's few area suitable for employment. Recently a former horse stables was converted to a "marijuana grow" site. With 401 EFU zoning you get this or maybe tractor or farm implement sales. If zoning could be changed to 602 Business Park (PB), Light Industrial (LI) or General Industrial (GI) the area is opened to electrical vehicle charging stations, exhibit halls, retail, trade schools, offices, research facilities, professional services, solar energy systems as well as many other permitted uses.

Please continue to keep Boring Option 1F area under consideration for worthy future development.

Sincerely,

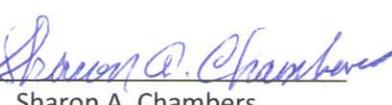


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January 14, 2010

METRO REGIONAL CENTER  
600 NW Grand Ave.  
Portland, Oregon  
Tel: (503) 797-1700  
Fax: (503) 797-1797  
Website: [www.oregonmetro.gov/reserves](http://www.oregonmetro.gov/reserves)

**SUBJECT: Portland Metro Urban & Rural Reserves VISION 2010-2050/60**  
**Core 4 Reserves- *Shaping the Next 50 Years* Open House & Hearing January 14, 2010**

References: 1) NASA Spinoff Technology 2009 Executive Summary  
2) NASA Innovative Partnerships Program (IPP) *see link on page 2*  
3) NASAfacts Hubble Space Telescope (HST) Servicing Mission 4 (SM4)  
4) Media Reference Guide HST Servicing Mission 4

Dear David Bragdon, Metro Council President, and Metro Council Members

Thank you for engaging the public in this very important decision making process whereby future success of generations is dependent on the outcome of the Urban Rural Reserves decisions that will be finalized during the next few weeks.

It is with this reality that I come before you as a stakeholder in the area in particular the Boring HWY 26 and HWY 212 1F Options area, which at times is considered a Regionally Strategic Industrial Area (RSIA). Regardless of the outcome of that specific area, my comments and the references identified in this letter (with website links page 2) apply to the entire region.

I urge the Council Members to think beyond what you know today. As mentioned in the 1/11/10 East County Meeting, the technical studies for the areas under consideration are essentially complete. Please see the attached references which articulate amazing accomplishments of some who think outside what they know today and venture into the unknown of complex technology creation and mission execution.

You will find in the referenced documents that NASA produces many technologies which benefit society. Whether it be in space, aerospace, solar, nano or green technologies....our world, life, health, safety, and communications are enhanced by the talented engineers, scientists, machinists etc. that support advanced technology and security industries by their efforts. May Oregon be a place,.. rather a home for people and businesses supporting our nation, communities and families.

May our children have opportunities exceeding our own experiences. Thousands of small businesses in the US design, create, produce everything from ball bearings, batteries, airframe composite materials, glass, lenses, resins, electronics, avionics, sensors, and “you name it” supporting high tech sector goals.

Oregon can and hopefully will continue to attract businesses (large and small) to the state and region while at the same time preserving vital farm production and exports. Thank you again for your hard work and the awesome progress your team continues to make.

Sincerely,

\_\_\_\_\_/s/\_\_\_\_\_  
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Sunnyvale, California

**Reference 1**

<http://www.sti.nasa.gov/tto/>

**NASA Spinoff Home Page- Commercial Uses for Space Technology**

Click on VIEW CURRENT ISSUE, then on next screen click on Spinoff 2009 (PDF)  
(This is a large file that does take awhile to open up, but it’s worth the wait)

**Reference 2**

<http://www.nasa.gov/offices/ipp/home/index.html>

**NASA Innovative Partnerships Program (IPP) Home Page**

**Reference 3**

[http://www.nasa.gov/pdf/252452main\\_FS\\_SM4\\_Summary.pdf](http://www.nasa.gov/pdf/252452main_FS_SM4_Summary.pdf)

**Hubble Space Telescope Servicing Mission 4 NASAfacts**

**Reference 4**

[http://www.lockheedmartin.com/data/assets/ssc/Hubble/09\\_SM4\\_Media\\_Guide\\_FINAL%5b1%5d.pdf](http://www.lockheedmartin.com/data/assets/ssc/Hubble/09_SM4_Media_Guide_FINAL%5b1%5d.pdf)

**Lockheed Martin Media Guide for Hubble Space Telescope (HST) Servicing Mission 4 (SM4)**



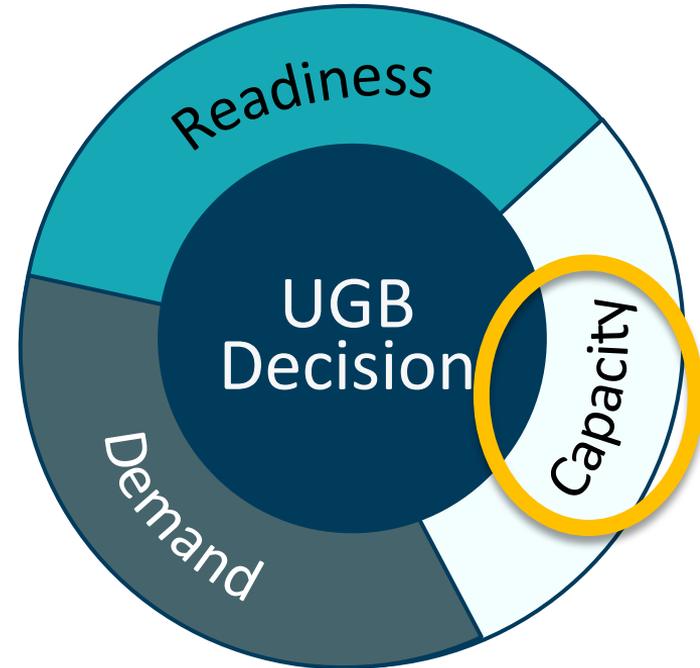
# Land capacity for growth

## November 2023

# Capacity in the UGR

The Urban Growth Report (UGR) is a decision-making tool for the Metro Council

Capacity is one of the three main components of the analysis in the UGR



DEMAND

How much land is in demand inside the UGB?

-

BUILDABLE LAND

How much land is buildable inside the UGB?

=

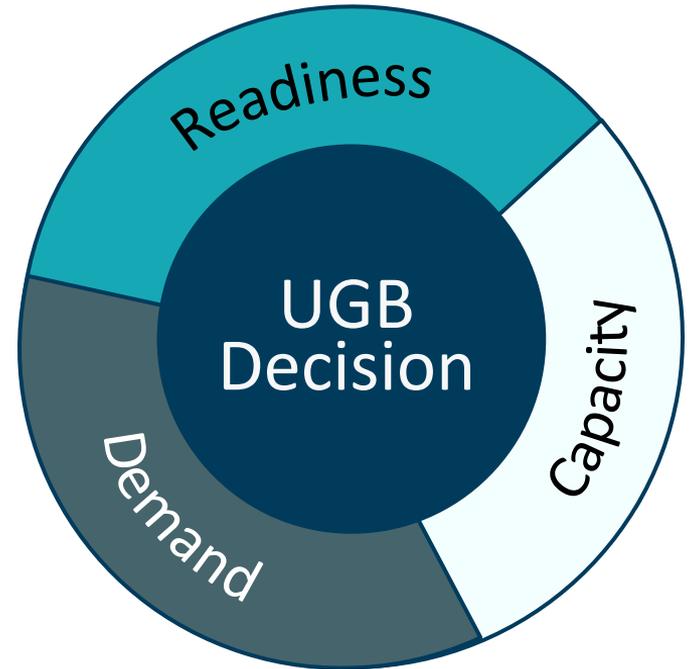
UGB  
EXPANSION

Is more land is needed because of household and employment growth?

# Land capacity for housing/jobs

Process to determine **capacity** inside the UGB to accommodate future growth

Complex process – there are over ½ million parcels in the UGB!



# Typical approach elsewhere in OR

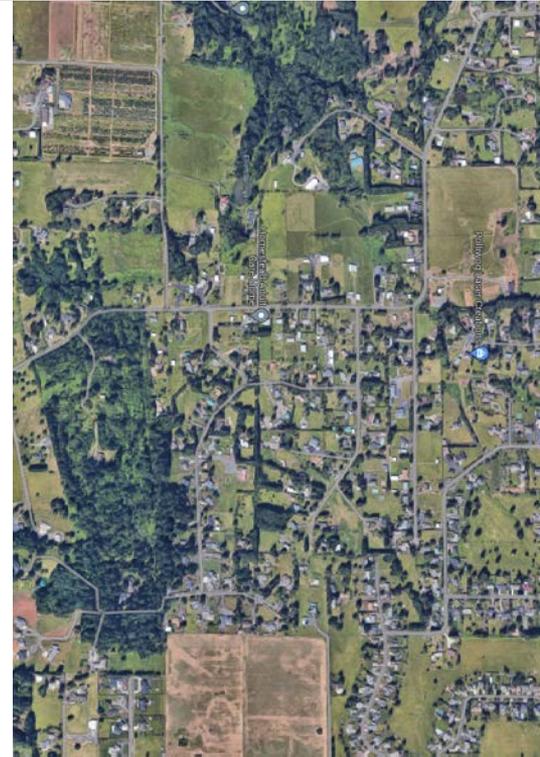
1. Identify vacant and partially vacant land
2. Remove land that isn't developable
3. Assume full buildout allowed by zoning

# Metro approach for determining UGB capacity

1. Categorize parcels as developed or vacant
2. Remove land that isn't developable
3. Apply generalized zoning
4. Determine capacity of developed and vacant land using a pro forma model

# 1. Categorize land

Staff uses previous analysis and aerial photos to determine if land inside the growth boundary is “vacant” or “developed”



# Vacant land includes:



Completely vacant/no  
hardscape



> 95% vacant



< 2,000 square feet developed  
AND > 90% vacant

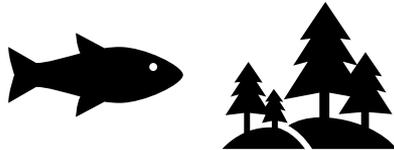
## 2. Remove some land

Remove land from the calculation in 3 categories

Exempt



Environmental  
constraints



Future right-of-way  
needs



# Exempt parcels include:

- Government owned (including Tribal land and utilities)
- Schools
- Rail properties
- Churches and social organizations (tax exemption codes)
- Private streets
- Parcels under 1,000 sq. ft.
- Parks, open spaces, private residential common areas



# Environmental constraints:

- Floodways
- Floodplain
- Steep slopes (>25%)
- Water quality / flood management lands
- Fish and wildlife habitat



# Set aside for future roadways

- Only on larger vacant parcels
- Considers future roads that'll be needed



# Local city/county review result

Metro provides the vacant land inventory for review by local planners to adjust as needed



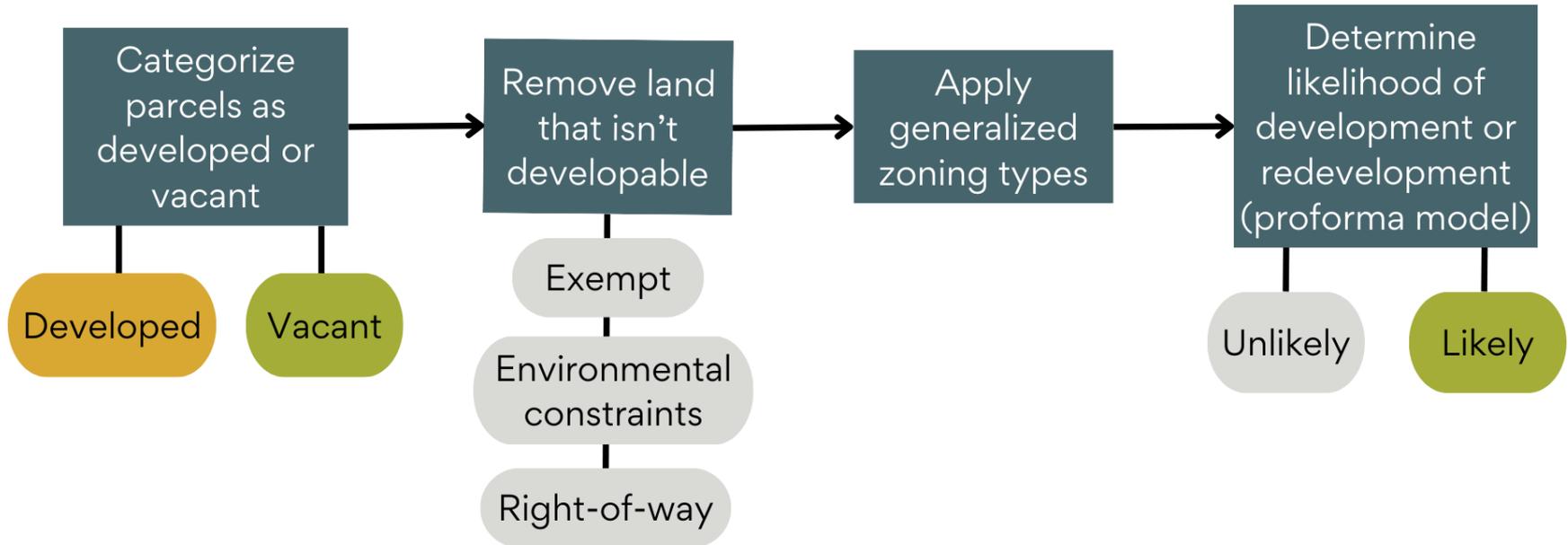
# 3. Apply generalized zoning

- All 24 cities and three counties in the region have unique zoning codes
- Metro categorizes possible zoning into “zone types” to approximate general designations

## 4. Determine capacity

Based on market forces and what could be built, is it likely that someone would choose to develop on a parcel?

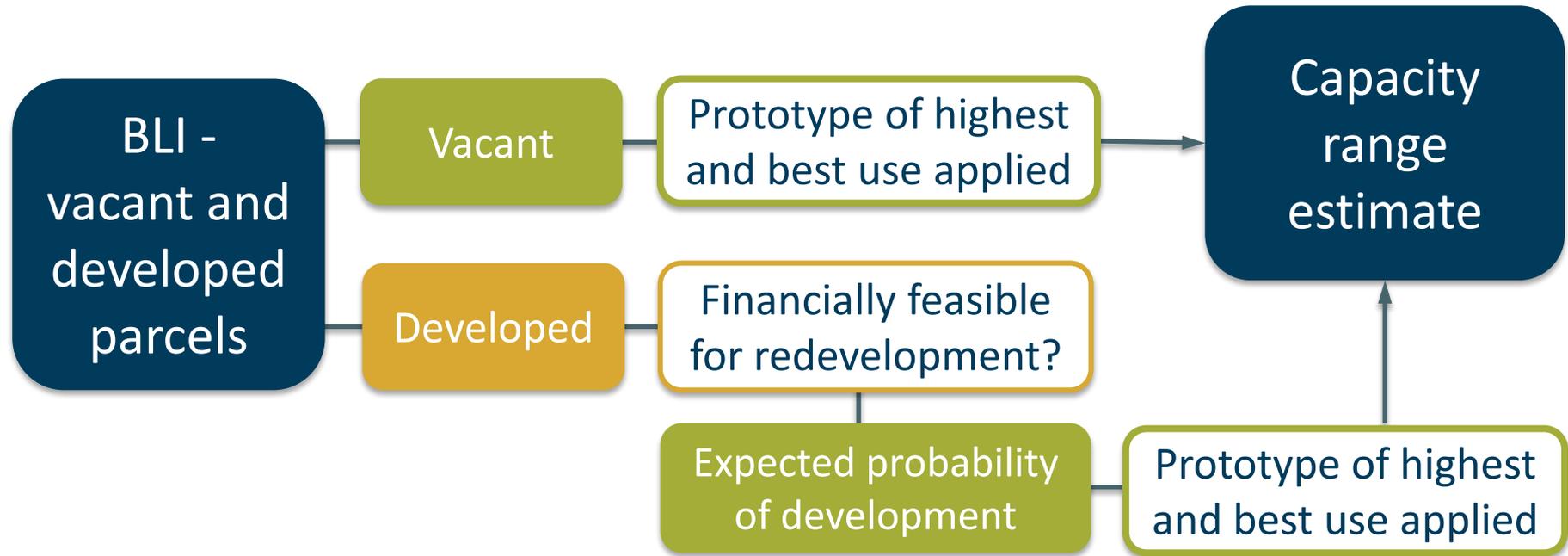
# Buildable land inventory process



# Proforma model

- A computer model using development prototypes
- Determines development density (units and acres) based on zoning and what's financially feasible
- Used for developed and vacant land

# Proforma model



# Proforma assumptions

## Driven by financial feasibility

Revenue & returns  
expected

Achievable rents

Threshold rate of  
return

Expenses expected

Construction cost  
assumptions

Operation expenses  
and vacancy

Property assumptions

Allowed density and  
parking requirements

## Technical work and analysis: Developing the urban growth report

- Buildable land inventory (BLI)
- Regional forecast
- Capacity analysis
- Employment trends and site characteristics
- Housing needs analysis
- Residential readiness analyses
- Draft urban growth report (UGR)

## City expansion proposals

- Letters of interest
- Expansion proposals

*2040 planning and development grants available*

## Metro Council decision

- Consider Metro staff and advisory group recommendations
- Public hearings
- Policy direction
- Final decision



- ### Stakeholder engagement
- MTAC
  - MPAC
  - CORE
  - Land Use Technical Advisory Group
  - Jurisdictional outreach
  - Stakeholder roundtable
  - Youth cohort
  - Interest group presentations

# 2024 urban growth management decision timeline

# Questions?

**Learn more:**

[oregonmetro.gov/public-projects/2024-growth-management-decision](https://oregonmetro.gov/public-projects/2024-growth-management-decision)

[oregonmetro.gov](http://oregonmetro.gov)





# Regional Freight Delay and Commodities Movement Study

E-commerce, mobility and reliability, and regional findings

MPAC meeting, November 8th, 2023

Tim Collins, Metro

# Main Study Objectives

- Identify highest volumes and values of commodities
- Explore increases in e-commerce and delivery
- Examine congestion and unreliability on the transportation system
- Make recommendations for future freight policy

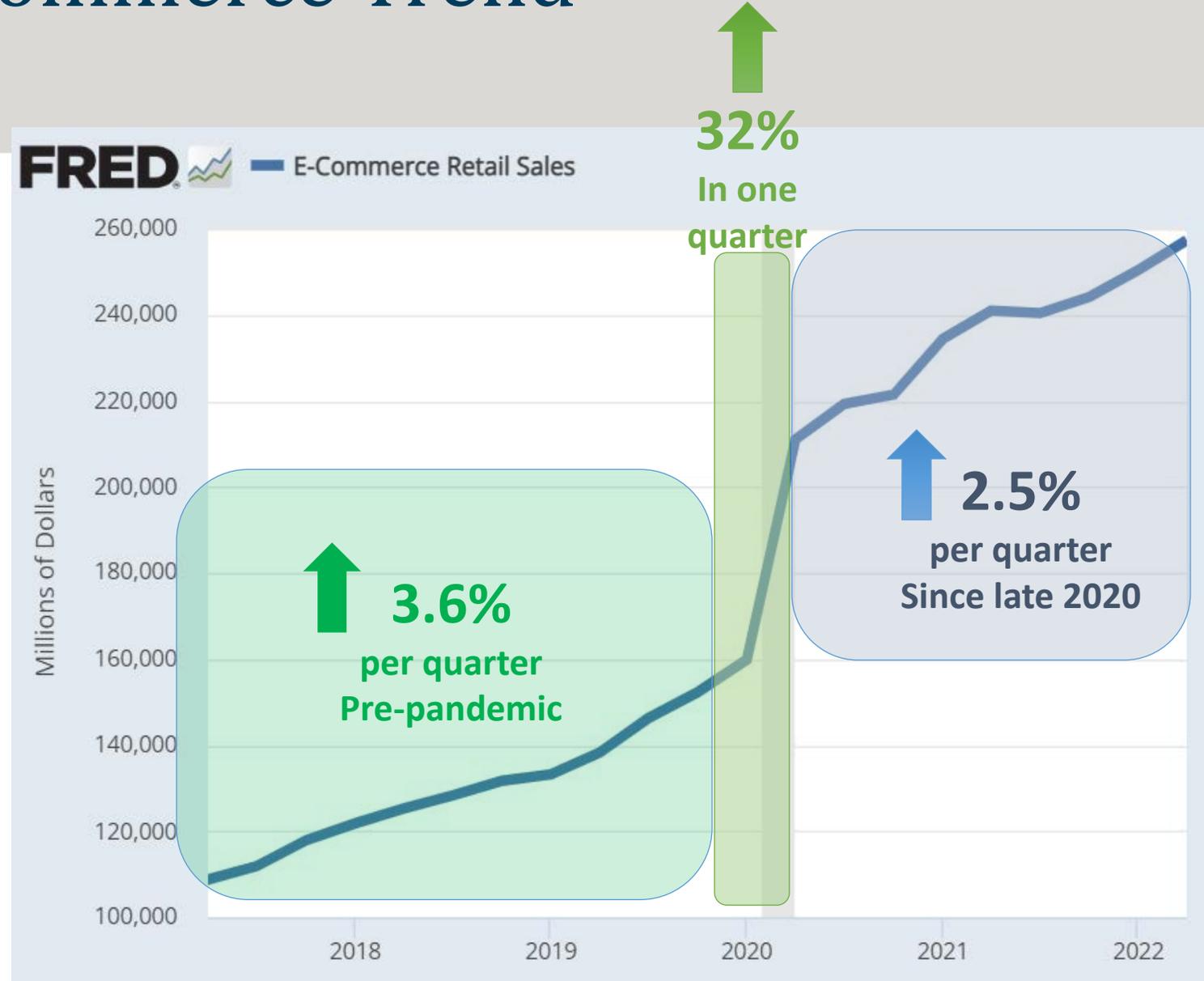


# Presentation Outline

1. E-commerce trends and impacts
2. Regional key findings on commodities movement
3. Mobility and Reliability Issues
4. Regional Freight Policy Questions and Lessons Learned
5. Next Steps – Final Report

# 1. National E-Commerce Trend

- Tremendous spike in e-commerce demand in 2020
- Growth rate has **slowed** since, but sales and deliveries continue to increase
- What effects has the pandemic had on e-commerce in this state and region?



# Summary of Impacts in the Region

- Rise of E-Commerce means more:
  - Industrial real estate development
  - Deliveries
  - Jobs and wages in key sectors
- Uncertainty on:
  - Net traffic and environmental impacts



## 2. Key Regional Commodity Flow Findings for 2020

1. Locations with largest daily dollar values for 'All Goods':
  - I-5 south of downtown Portland to Wilsonville
  - I-84 east of I-205 to Troutdale
  - I-5 north of downtown Portland to Vancouver
2. Electronics, Food, Misc. Manufacturing, and Motor Vehicles are the most common commodity types, by percentage of daily dollar value, on all the interstate and state highways.

# Regional Commodity Flow example: I-5 and I-205 - North end of the region

1. Daily \$ values for 'All Goods' exiting at north end of the region:

- I-5 NB at Columbia River is \$67.1 M
- I-205 NB at the Columbia River is \$24.7 M

2. Daily \$ values for 'All Goods' entering at north end of the region:

- I-5 SB at Columbia River is \$65.5 M
- I-205 SB at the Columbia River is 49.2 M

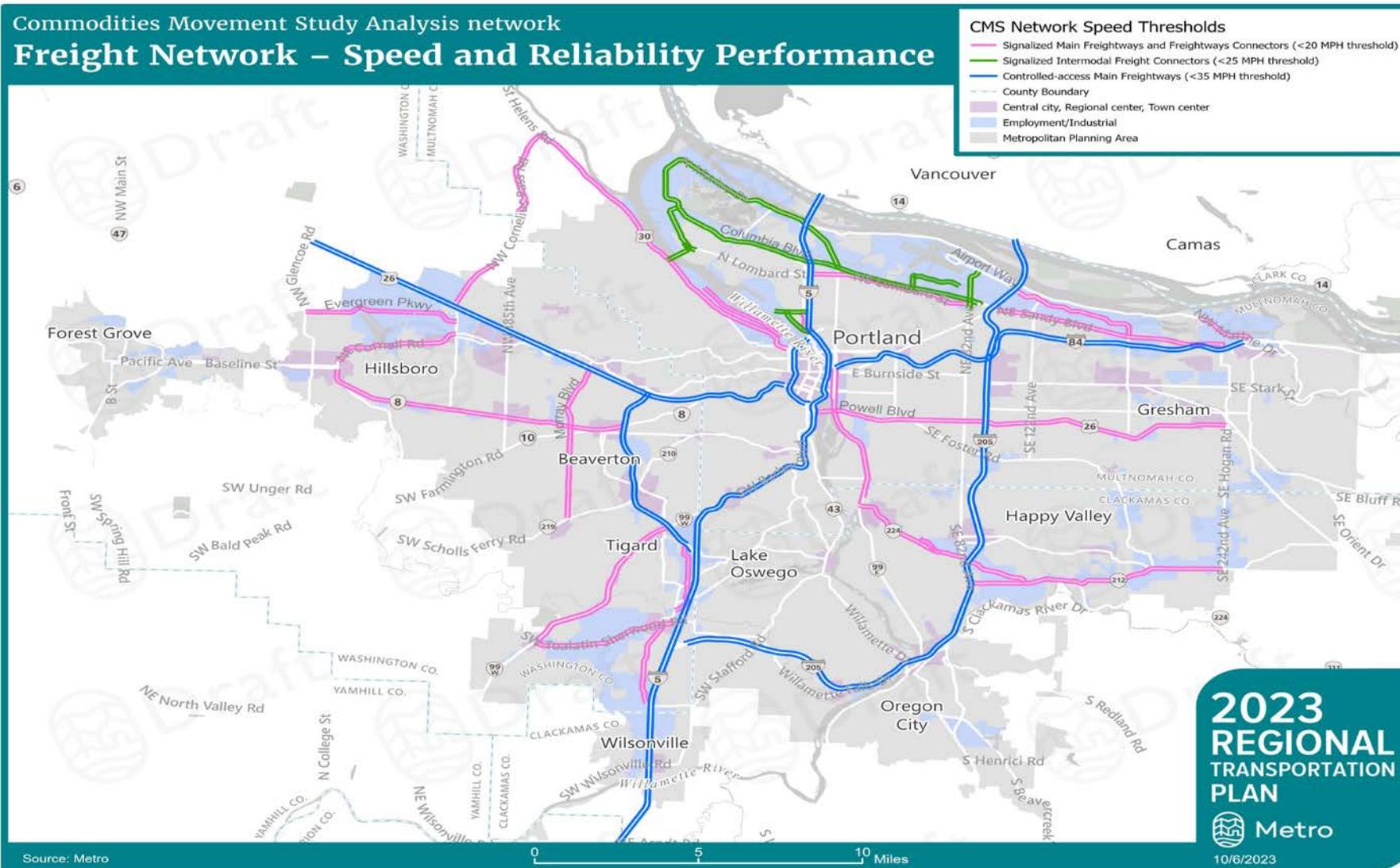
### 3. Regional Mobility Policy update based on average speeds

- Regional Mobility Policy update – Measures hours of reduced average speeds throughout the day on regional throughways that exceed these thresholds:
  1. **Less than 35 mph** for up to 4 hours, on regional throughways with limited access
  2. **Less than 20 mph** for up to 4 hours, on regional throughways with signals and other access

# Commodities Movement Study (CMS) expands the network for freight mobility

- Commodities Movement Study – Measured freight mobility throughout the day on the regional freight network that don't meet these thresholds:
  1. **Less than 35 mph** for up to 4 hours, on freeways
  2. **Less than 25 mph** for up to 4 hours, on regional intermodal connectors
  3. **Less than 20 mph** for up to 4 hours, on highways with signals and other signalized freight network routes

# Freight network used for average speed and travel time reliability analysis



# What is the Travel Time Reliability Index (TTRI)?

- Measures travel times at different times of the day for each of the segments on the regional transportation system
- This study looks at the TTRI for the AM travel times from 6 to 10am, and the Mid-day travel times from 10 am to 4 pm
- The TTRI does not measure congestion; locations can be reliably congested during a period of the day.

# Existing Mobility and Reliability Issues

- Identified top locations with speed or reliability issues
  - HOC – Hours of Congestion (Speed below threshold)
  - TTR – Travel Time Reliability (How long can it take relative to normal)
- The following slide summarizes the performance of freight network facilities and how they compare to each other

TABLE KEY	HOC	TTR (AM or MIDDAY)
<u>Top Tier Issue</u> (Relative to other freight facilities)	<u>7+ Hours</u>	<u>3+ Times as long</u>
<u>Second Tier Issue</u> (Relative to Other Facilities)	<u>4 to 7 Hours</u>	<u>2 to 3 Times as long</u>
Third Tier Issue (Relative to Other Facilities)	3 to 4 Hours	Under 2 Times as long

# Examples of Existing Mobility and Reliability Issues

CORRIDOR	LOCATION	SPEED (HOC)	TTR (AM)	TTR (MIDDAY)
I-405	NB (US 26 to I-5)	<u>3.6 to 4.5</u>		<u>3.9 to 4.7</u>
	SB (US 26 to I-5)	<u>4.4 to 6.4</u>	<u>2.7 to 3.7</u>	<u>3.1 to 4.2</u>
I-5 (North)	SB (Marine to I-84)	<u>5.3 to 9.1</u>	<u>2.0 to 2.4</u>	<u>2.3 to 3.3</u>
	NB (I-84 to Vancouver WA)	<u>5.0 to 6.8</u>		<u>4.5 to 6.7</u>
I-84	WB (I-205 to OR99E)	<u>3.9 to 7.7</u>		<u>2.0 to 2.1</u>
	EB (OR99E to Sandy)	<u>3.5 to 5.6</u>		<u>1.8 to 2.2</u>
I-5 (South)	SB (I-205 to Boones Ferry)	3.1		<u>4.7</u>
	NB (Capitol Road to Multnomah Blvd.)	3.1	<u>2.3</u>	
	NB (Dartmouth to Capitol Road)	Not applicable	<u>3.2</u>	

- **I-405** has Tier 2 duration of low speeds, but higher degree of unreliability
- **I-5 North** has generally longer duration of low speed (Tier 1 and Tier 2) and high midday unreliability
- **I-84** also longer duration of lower speed, though reliability better than I-5 North
- **I-5 South** generally fewer hours of low speed, but unreliability higher in some segments

## 4. Regional Freight Policy Questions: Lessons Learned

Q1

What are **emerging trends** in the freight sector that have certain types of impacts on the transportation system?

Q2

When and how should the public sector **play a role** in addressing the growth **impacts that e-commerce** and goods delivery is having?

Q3

Are there **new ways to address goods movement performance** and what is relevant to know about freight and goods movement?

Q4

What are ways in which the freight sector can **reduce greenhouse gas emissions**?

# Q1: Emerging Trends

What are **emerging trends** in the freight sector that have certain types of impacts on the transportation system?

Trend	Global “Big Picture” Impacts	Portland Regional Impacts: \$ <i>Economic Impacts</i> + <i>Transportation Impacts</i>
<b>Mitigating risks/uncertainty</b>	<ul style="list-style-type: none"> <li>- Diversifying production locations</li> <li>- “Reshoring” production and materials sourcing</li> </ul>	<ul style="list-style-type: none"> <li>\$ New manufacturing job opportunities</li> <li>+ Origins and destinations, modes, routes, etc., may change</li> </ul>
<b>Technological advancement</b> <i>(A.I., terminal and vehicle automation, 3D printing, etc.)</i>	<ul style="list-style-type: none"> <li>- Could reduce transportation costs and facilitate more diverse and resilient supply chains</li> </ul>	<ul style="list-style-type: none"> <li>\$ Potential to gain a regional economic competitiveness advantage</li> <li>+ Improved efficiency, reduced truck delay</li> </ul>
<b>Growth in e-commerce demand</b>	<ul style="list-style-type: none"> <li>- Emphasis on “time-definite” delivery</li> <li>- Increase in foreign imports to the U.S.</li> <li>- Networks of fulfillment and delivery centers in/near population centers</li> </ul>	<ul style="list-style-type: none"> <li>\$ Increased jobs in some sectors;</li> <li>\$ Increased pressure on industrial real estate</li> <li>+ Net effects of e-commerce are not well understood</li> <li>+ Last-mile challenges in many Portland neighborhoods and other urban/mixed-use centers</li> </ul>

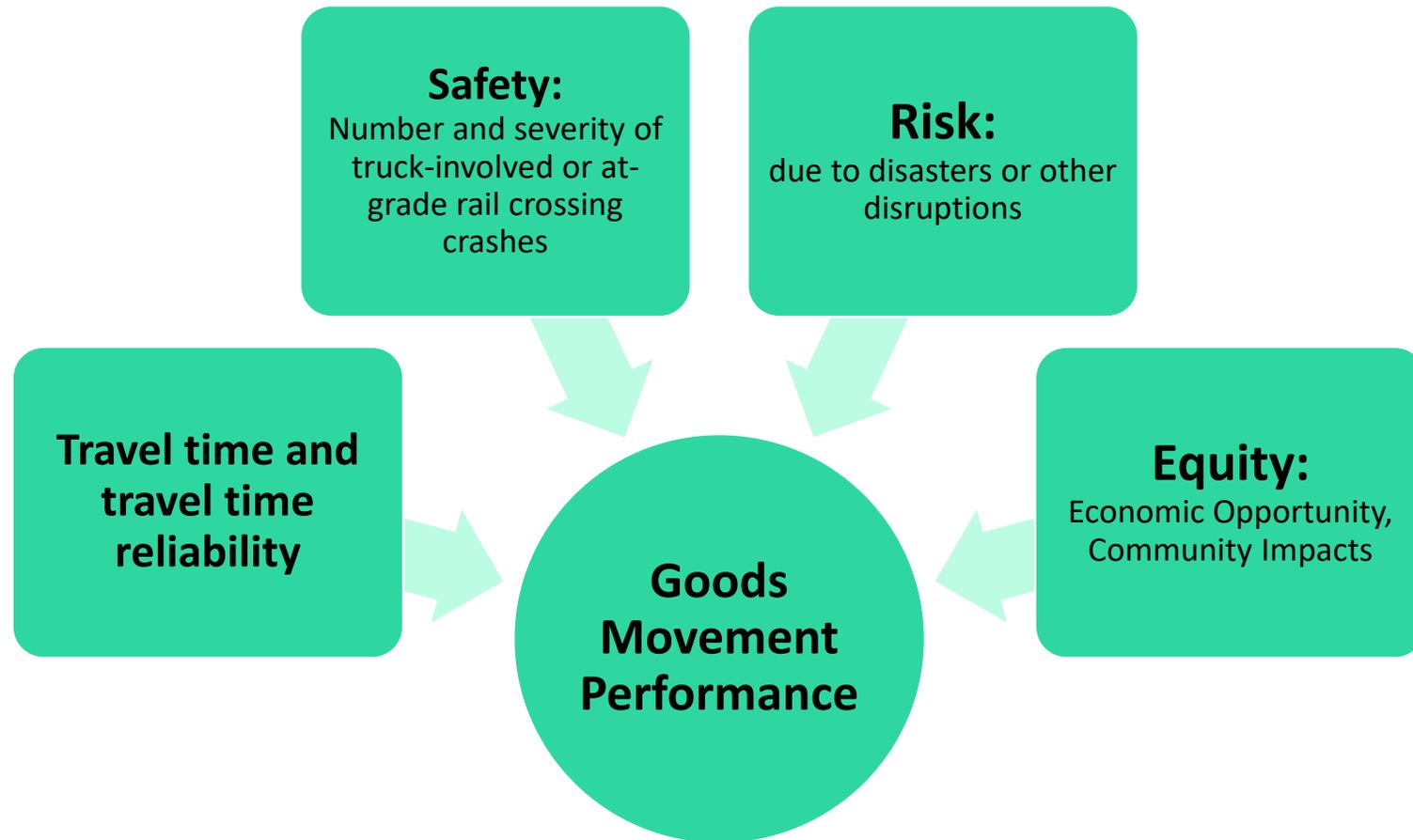
When and how should the public sector **play a role** in addressing the growth **impacts that e-commerce** and goods delivery is having?

## Q2: Public Sector Role in E-Commerce Impacts

Issue/Impact	How to Address the Issue
Curb access, double-parking, etc.	<b>Context-sensitive curb management and parking strategies</b> , including right-sizing loading zones, flexible curb zones, and reservation systems
Land use: Warehouse and fulfillment center development	Conduct an <b>inventory of land use</b> appropriate for warehouse and fulfillment center development and assess capacity versus need. <b>Monitor development</b> and redevelopment trends in industrial districts. Might need changes to land use policies
Land use: “Dark store” conversions	<b>Review land use regulations</b> to determine if dark store conversions are feasible. Conduct <b>outreach</b> to determine if and where such conversions may be desirable or undesirable. <b>Adjust land use regulations as necessary.</b>
Augment the public’s understanding of e-commerce trends and impacts	Purchase available <b>data, perform analysis</b> and integrate with existing modeling tools to estimate the transportation system effects of e-commerce and last-mile deliveries. <b>Incorporate findings into planning</b> documents and public/stakeholder engagement activities

# Q3: Goods Movement Performance

Are there new ways to address goods movement performance and what is relevant to know about freight and goods movement?



What are ways in which the freight sector can reduce greenhouse gas emissions?

# Q4: Reducing Freight Emissions

## Methods for reducing freight emissions:

- Transition fleets to alternative fuels
- Mode shift (truck to rail for long-haul)
- Alternative last-mile delivery solutions (cargo bikes, delivery robots, etc.)
- Continue to improve routing efficiency (using A.I. and other tools).



Image sources: Top: Daimler Trucks North America; Bottom: Portland Bureau of Transportation, image captured from a video titled "2040 Freight Featured Perspective: B-Line Sustainable Urban Delivery, 2022."

# Next Steps: Final Report Outline

- Executive Summary
  1. Introduction
  2. Project Team and Stakeholder Participation
  3. Regional Freight Policy Framework and Policy Questions
  4. Commodities Movement by Trucks
  5. Network Performance
  6. Trends Impacting Current and Future Commodity Movements
  7. Addressing Goods Movement Performance
  8. Study Recommendations and Freight Policy
  9. Next Steps and Further Research

# Comments and feedback

Questions?

