Joint Legislative Committee on Semiconductors

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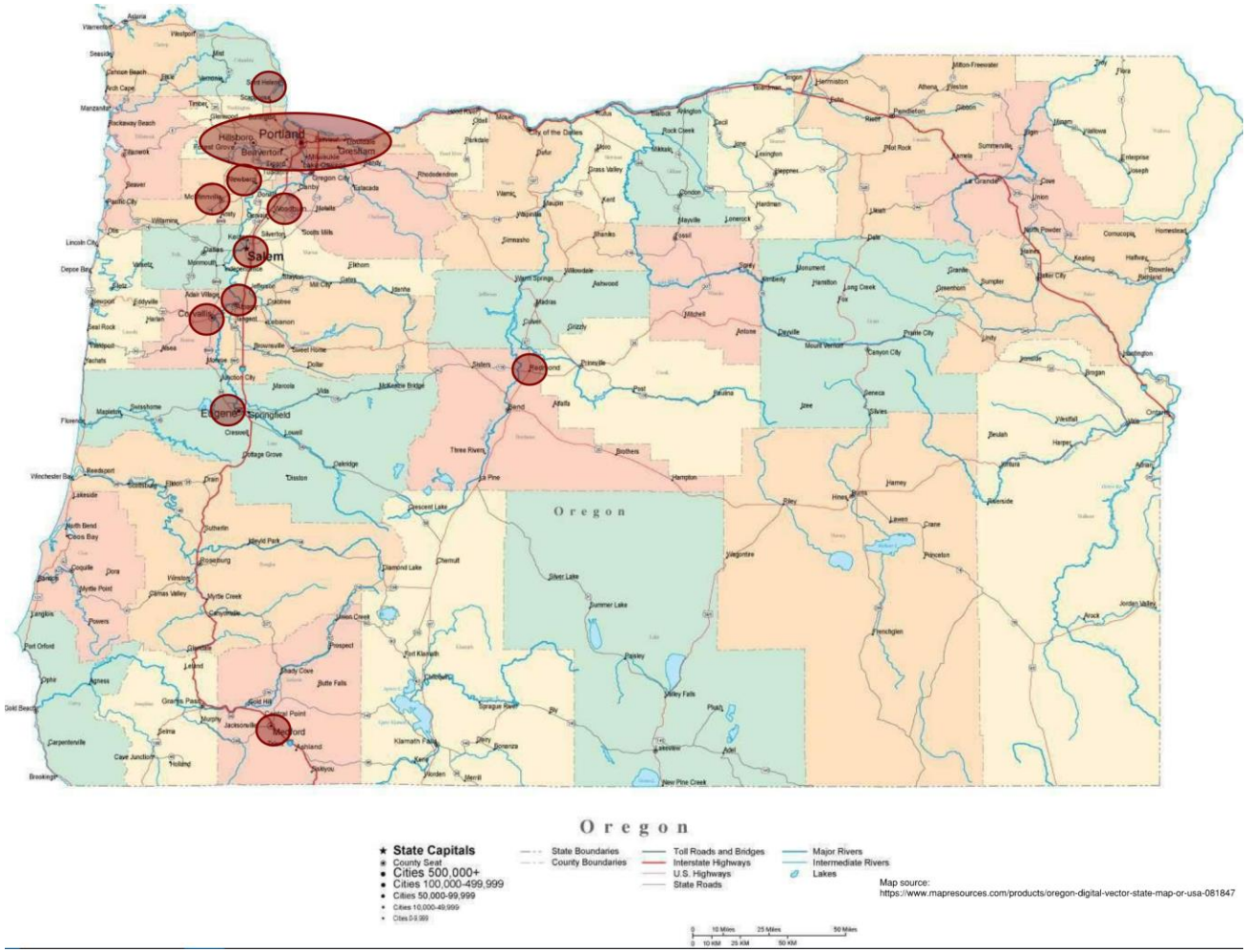
Semiconductor Task Force
Industrial Lands Subcommittee

1. Follow Task Force Guidance
2. Inventory sites greater than 25 acres in:
    1. Metro Area
    2. Columbia County
    3. Willamette Valley
    4. Rogue Valley
    5. Central Oregon
3. Validate with EcDev Practitioners
4. Compare against Industry-Siting Criteria
5. Consult w/ Technical Advisory Committee

Technical Advisory Committee (TAC)	
	Business Oregon City of Albany City of Gresham City of Hillsboro City of Portland Clackamas County METRO Oregon Business Council Oregon Dept of Land Conservation & Development (DLCD) Oregon Economic Development Association (OEDA) Port of Portland Washington County

Semiconductor Task Force
High Technology Clusters in Oregon



Industry-Driven

CRITERIA	R&D and/or fab	Device manufacturers or major semi. Equipment manufacturers	Key suppliers to semi. cluster
Acres	500+	50 - 100	15 - 35
Site Building Ready	18-24 months	12 months	6 months
In UGB	Y	Y	Y
Zoning	Industrial	Industrial	Industrial
Distance to Int'l Airport	< I hour	< 2 hours	< 1 hour
Distance to Major Hwy	< .5 miles	< .5 miles	< .5 miles
Distance to Industry Cluster		< 2 hours	< 1 mile
Electricity Demand	100 - 300 MW	10-100 MW	1-5 MW
Site Slope	< 4% preferable	< 4% preferable	< 4% preferable
Existance of Wetlands	delineation complete, mitigation plan in	delineation complete, mitigation plan in	none
Water Demand	10-40 mgd	1-10 mgd	1 mgd
Water Line Size			
Sanitary Sewer Demand	10-40 mgd	1-10 mgd	1 mgd
Sewer Line Size			
Region population	capable to support 10,000 + employees	capable to support 2,000 + employees	capable to support 500 + employees
Site infrastructure	plan in place, funding identified	plan in place, funding identified	in place

Key Findings

	Recommended by Semiconductor Task Force
R&D Campus and/or fab +/- 500 acres	2
Device manufacturers or Fab./Equipment Supplier 50-100 acres	4
Key Materials Supplier 15-35 acres	8

Key Findings

	Recommended by Semiconductor Task Force	Finding	Location
R&D Campus and/or fab +/- 500 acres	2	0	

Device manufacturers or Fab./Equipment Supplier
50-100 acres
	4	7	• Albany
			  ○ Within 2 hours of PDX
			• Columbia City
			  ○ No proximity to industry cluster.
			  ○ Ready within 6 months
			• Millersburg (3)
			  ○ Within 2 hours of PDX
			• St Helens
			  ○ No proximity to industry cluster
			  ○ Ready within 6 months.
			• Woodburn

Key Materials Supplier 15-35 acres	8	1	• Same Woodburn site

Portland Metro Industrial Site Inventories

	2011			2014			2017			2022*		
TIER		Acreage			Acreage			Acreage			Acreage	
	Sites	Gross	Net	Sites	Gross	Net	Sites	Gross	Net	Sites	Gross	Net
ONE	9	463	433	14	740	636	10	502	425	2	82	**82**
TWO	16	801	715	17	1,240	1,102	11	765	677	6	498	**477**
THREE	31	2,885	2,354	23	1,961	1,300	26	2,327	1,679	20	1,984	**1,442**
TOTAL	**56**	**4,150**	**3,502**	**54**	**3,941**	**3,039**	**47**	**3,594**	**2,781**	**28**	**2,565**	**2,001**

Mackenzie. served as the lead Industrial Lands consultant for each of the analyses

*estimated

MACKENZIE.

Site Readiness Toolkit (2020) is a Statewide Resource

- Infrastructure costs are the single largest cost hurdle
- Current tools are too small in scale to move needle on large sites
- State and regional action is needed to build-out the toolbox

Recommendations

1. Statewide advanced manufacturing strategy with industrial land component
2. Site readiness toolkit funding and policy through Business OR and DLCD
3. Capitalize strategic manufacturing fund through the RSIS program – recapitalize fund with land sales
4. Expedite planning necessary for Oregon to have two 500+ acre sites attractive to semiconductor recruitment – engage a public developer to conduct site readiness on sites identified through study