



Agenda

**NORTHERN WATERFRONT
ECONOMIC DEVELOPMENT INITIATIVE
AD HOC COMMITTEE**

August 2, 2023

10:00 A.M.

Join in person:

**1025 Escobar St, Room 110A, B, C
Martinez, CA 94553**

Please click the link below to join the webinar:

<https://cccouny-us.zoom.us/j/89883005265>

Meeting ID:

898 8300 5265

Or Telephone:

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USA 214 765 0478 US Toll

USA 888 278 0254 US Toll-free

Conference code: 841892

Supervisor Diane Burgis, District III
Supervisor Federal Glover, District V

Agenda Items:

Items may be taken out of order based on the business of the day and preference of the Committee

1. Welcome and Introductions
2. Public comment on any item not on this agenda (speakers may be limited to three minutes).
3. REVIEW and APPROVE meeting record from May 17, 2023 Northern Waterfront Economic Development Initiative Ad Hoc Committee
4. RECEIVE presentation from City of Pittsburg on Brownfields Redevelopment (Sara Bellafronte, Assistant to City Manager).
5. RECEIVE Updates from staff and/or PROVIDE direction to staff regarding Northern Waterfront Economic Development Initiative work program.
6. Comments from Representatives of Partner Cities
7. Committee Member Comments
8. Adjourn to the next meeting (Wednesday, November 29, 2023)

The Northern Waterfront Economic Development Initiative Ad Hoc Committee will provide reasonable accommodations for persons with disabilities planning to attend committee meetings. Contact the staff person listed below at least 72 hours before the meeting.

Any disclosable public records related to an open session item on a regular meeting agenda and distributed by the County to a majority of members of the Northern Waterfront Economic Development Initiative Ad Hoc Committee less than 96 hours prior to that meeting are available for public inspection at the Department of Conservation & Development, 30

Muir Road, Martinez, during normal business hours. Staff reports related to open session items on the agenda are also accessible on line at www.co.contra-costa.ca.us.

Public comment may be submitted via electronic mail on agenda items at least one full work day prior to the published meeting time.

For Additional Information Contact:

Alyson Greenlee, Economic Development Manager
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Contra Costa County Board of Supervisors

Subcommittee Report

NORTHERN WATERFRONT ECONOMIC DEVELOPMENT INITIATIVE AD HOC CTE

Meeting Date: 08/02/2023

Subject: REVIEW and APPROVE meeting record from May 17, 2023 Northern Waterfront Economic Development Initiative Ad Hoc Committee

Submitted For: Alyson Greenlee,

Department: Conservation & Development

Referral No.: N/A

Referral Name: REVIEW and APPROVE meeting record from May 17, 2023 Northern Waterfront Economic Development Initiative Ad Hoc Committee

Presenter: Alyson Greenlee **Contact:** 925-655-2783

Referral History:

This is an ongoing item of the Committee.

Referral Update:

REVIEW and APPROVE meeting record from May 17, 2023 Northern Waterfront Economic Development Initiative Ad Hoc Committee

Recommendation(s)/Next Step(s):

Attachments

Northern Waterfront Ad Hoc Committee Meeting Minutes May 17, 2023

**NORTHERN WATERFRONT
ECONOMIC DEVELOPMENT INITIATIVE
AD HOC COMMITTEE – Meeting Record
May 17, 2023, 10:00 A.M. In Person/Via Zoom**

Supervisor Diane Burgis, District III

Supervisor Federal Glover, District V

1. Welcome and Introductions

Supervisor Glover called to order at 10:14 AM. Supervisor Glover and Burgis introduced themselves.

2. Public comment on any item not listed on this agenda.

Mike Moore didn't see anything in the document relating to the California Economic Resilience \$600 million Fund headed by All Home that would have a favorable impact on the Northern Waterfront.

3. Review and approve Meeting Record from December 17, 2020, Northern Waterfront Economic Development Initiative Ad Hoc Committee

Supervisor Burgis acknowledged and welcomed new staff person – Alyson Greenlee and indicated she is fine with the meeting record. Supervisor Glover indicated he was also fine with the meeting record. Supervisor Glover suggested before moving forward introductions take place. Supervisor Glover introduced Ad Hoc Committee members, himself, and Supervisor Burgis. Supervisor Glover requested staff introduce themselves. John Kopchik, Director, Department of Conservation and Development introduced himself,

Alyson Greenlee, Economic Development Manager, Department of Conservation and Development, George Carter, Economic Development Project Manager.

4. Receive presentation and updates from staff and/or provide direction to staff regarding Northern Waterfront Economic Development Initiative work program for 2023.

DCD Staff Alyson Greenlee indicated she had a PowerPoint slideshow that's not part of the agenda material and requested permission to present it. She requested the Ad Hoc Committee take a vote and accept the materials into the meeting agenda. Ad Hoc Committee members both voted in favor to accept the Power Point materials into the meeting agenda. Staff Greenlee introduced the economic development team which consists of herself as Economic Development Manager and George Carter as Economic Development Project Manager. Both positions were filled to help advance the projects under the Northern Waterfront umbrella. The recent and proposed activities to implement the Northern Waterfront strategic action plan are as follows:

A. Business Environment

Promoting a Business Environment that Allows the Advanced Manufacturing Sector to Flourish and Expand.

- County staff in economic development planned and executed a tour of the Northern Waterfront on November 2, 2022 with county and city elected officials and economic development staff from the State, regional and local levels along with the cities of Hercules, Martinez, Brentwood, Oakley, Antioch, Pittsburg, and the County to have each city and the county highlight a key site to these officials, and show the overarching collaboration which is a hallmark of the Northern Waterfront Initiative. Greenlee also noted stops were made at Bay Point to market the emerging industries and the Bay Area testing site at Byron Airport.
- Since 2021, county economic development staff have convened 6 quarterly meetings of economic development staff from the 19 cities

countywide and the Northern Waterfront cities and the Contra Costa Workforce Development Board to remove barriers to coordination/collaboration and funding and county staff will convene meetings in May 2023, July 2023, and October of this year. Staff will convene an Economic Development Summit in the Fall of 2023 with State, regional and local partners, Chambers, and the other partners of the Northern Waterfront Initiative to communicate progress on the Northern Waterfront Initiative, also including the Workforce Development Board.

B. Innovation Ecosystem

Actively recruiting new startups by leveraging existing assets and encouraging sustainable industries that reduce and prevent pollution and waste.

- As part of the strategic plan for the Northern Waterfront that relates to the innovation ecosystem, County economic development staff convened an information sharing event with the Berkeley laboratory, several staff members of the Department of Conservation and Development and Public Works to proactively work to identify and recruit startups to locate on the Northern Waterfront that are reducing and preventing pollution and waste and encouraging sustainability. Staff presented on initiatives related to sustainability, recycling and waste reduction and public works to several lab directors, research, strategic partnership and technology transfer directors and startup founders. County economic development staff will continue to explore potential partnerships with the Berkeley Lab that facilitates technology transfer on the Northern Waterfront and other opportunities to support the development, accessibility, inclusivity and the environmental sustainability and engagement with local companies and entrepreneurs on the Northern Waterfront.
- Staff attended a Concord Life Science open house to support the Life Science Center and supported the City of Martinez in its EUV Tech Chips Act grant application.
- County economic development staff along with the Recycling Market Development Zone Administrator in the Department of Conservation

and Development participated in the Cal Recycle Zone Works training workshops to learn more on how to market and expand Contra Costa County's recycling market development zones low interest loan program. Staff will work with the Zone Administrator to utilize Cal Recycles zone incentive funds to update and expand the recycling market development zone website and other marketing materials and continue to support companies here in the Northern Waterfront that are seeking recycling market development zone funding.

C. Cleanup and Redevelopment of Brownfields

Strengthening the Northern Waterfront as a premier location for Advanced Manufacturing.

- Economic development staff participated in the University of California L.A. and Irvine Brownfields 101 Conference from February to March 2023 to be trained on how to utilize U.S. Environmental Protection Agency Brownfields Assessment Grant programs as seed capital to clean-up and redevelop brownfield sites.
- Staff will attend the Brownfields National Conference in Detroit, Michigan in August 2023, and the California Land Recycling Conference in Carson, California in September 2023 to continue to develop partnerships to pursue grants to inventory and assess brownfield sites.
- County Economic Development staff presented to the Hazardous Materials Commission on December 8, 2022.
- County Economic Development staff will utilize Cal Recycles zone incentive funds to update and expand the marketing of the recycling market development zone and produce a website of industrial zoned land and developable sites including the number and size of parcels, vacant and underutilized sites, zoning infrastructure capacity, transportation capacity, rail service, and deep-water access.

Question from Supervisor Glover: Brownfield cleanups and those grants normally come from EPA. Have we identified those areas in the county and our cities doing the same thing in identifying areas?

Answer from Alyson: No, we have not. We know some cities such as the City of Pittsburg have U.S. EPA brownfield grants and we would love to be able to do something similar in the county.

Question from Supervisor Glover: Do we have a plan for identifying what areas we need for clean up?

Answer from Alyson: At this point, no.

Statement from Supervisor Glover: My concern is that if there are grants out there, we need to put together a plan so we can identify where that cleanup needs to be done. Even if it's not done today, I would like to see us put together a plan and understand what it looks like for us.

Question from Supervisor Burgis: Alyson, what you're talking about is creating an inventory and identifying them at this point?

Answer from Alyson: The Department of Toxic Substance Control (DTSC) has a website that has a resource in terms of an inventory of available brownfields.

Suggestion from Supervisor Burgis: Is it possible to have the link to the available sites on the website.

Response from Alyson: My understanding from the brownfields training is that inventory and assessment is something that could be funded through a U.S. EPA grant. Our participation at the conference in August is intended to lay the groundwork. A lot of these grant applications become available in the Fall. If we are wanting to produce that assessment, I believe the time to do that would be to submit a grant application this coming Fall.

Question from Supervisor Burgis: Would it behoove us to include Pittsburg, Antioch, Martinez and all those different cities we would want to partner with?

Feedback from Supervisor Glover: I think that's a great idea. We were a major part of the Pittsburg grant. Initially they had \$300,000, and there was a renewable grant at the end of the initial cycle. We would want to identify the sites and work with the cities.

Feedback from Supervisor Burgis: Federal and I have been in D.C. and met with the EPA folk and have the relationships and infrastructure to be able to lean in on

this. We just must have a plan, identify, work with developers, and act. Supervisor Burgis also indicated that she has crossed paths with organizations and businesses that specialize in the development of brownfields.

Response from Alyson: Thank you, one of the organizations that we have met with is the Center for Creative Land Recycling.

D. Infrastructure Capacity

Expanding and upgrading utility infrastructure to support business growth.

- In accordance with the Board's direction, on February 7, 2023, county economic development Staff applied for the Metropolitan Transportation Commission Priority Production Areas (PPA) pilot grant program for multiple priority production areas in the northern waterfront. This includes the 2 PPAs within unincorporated Contra Costa County: Pacheco Manufacturing Zone, and the Bay Point Industrial Center. It also includes partner cities of Concord, Pittsburgh, Antioch, and Oakley. If funded, this grant award for technical assistance would support the planning and infrastructure in the PPAs of the northern waterfront.
- In accordance with the policy adopted by the Board of Supervisors, on February 22, 2022, the economic development staff of the county continue to implement the county's policy on participating in enhanced infrastructure financing districts (EIFD).

Question from Supervisor Glover: Anything happening in those areas that you've identified in terms of the priority production areas?

Response from Alyson: We are waiting to hear back from MTC in the month of June as to whether we will be receiving the grant. The application submitted was for \$750,000. It was led by the County and had the support of the other 4 cities in the northern waterfront that have priority production areas.

E. Regional Marketing

Promoting the Northern Waterfront as the premier location for advanced manufacturing

- The staff from the county economic development department and the cities of Antioch and Brentwood participated in TeamCalifornia—the nonprofit membership-based organization that markets California communities and site location assistance for California—at its 9th Annual Forum in San Joaquin County in December of 2022 to hear from multiple site location consultants who are making decisions about business investments in California, including for the northern waterfront target sectors of biomedical biotech and cleantech.
- Staff will pursue membership in TeamCalifornia to make connections with site selectors at the Forum in 2023 and at selected trade shows and industry sponsored events focused on the target industries of the northern waterfront.
- Economic development staff from the County and several East County cities of Pittsburg, Antioch, Oakley, and Brentwood also presented opportunities in the region at the East County Brokers Breakfast in Pittsburg in September of 2022; at the Hazardous Materials Commission; at the Workforce Development Board’s Business and Economic Development Committee; at the Diablo Valley Technology Initiative; at the East Bay Leadership Council; and at various meetings of community advisory panels in the past year.
- Economic development staff continue to maintain the webpage for economic development with up-to-date information on services, opportunities to do business with the County, funding opportunities for businesses, major projects such as the Northern Waterfront, resources and contact information. Staff will update and expand the web presence for the Northern Waterfront Initiative including with economic data, current trends in the target industries, links to individual city and county websites, and to the Envision 2040 General Plan, and demographic and labor force data as required by business and site selectors.

Request from Supervisor Burgis: Alyson, in the future, can you give us the data on how often that site is visited and the activity on that site? I’m interested to see what this activity is helping people find. I want to know that it’s doing something.

Response from Alyson: Thank you.

- A Green Empowerment Zone that includes the northern waterfront area of the County of Contra Costa was approved by the legislature on September 28, 2021. The Board of Directors for the Green Empowerment Zone is in the process of being established. Supervisor Gioia has been appointed as the representative for Contra Costa County. The legislature has also approved a \$5 million appropriation for one-time start-up funding.

Question from Supervisor Glover: Do we have any ideas in terms of what the timing looks like and what the objectives are going to be around that Green Empowerment Zone?

Response from John Kopchik: We don't know the timing of what jurisdictions are on the board. There's also been discussion between staff from DCD and staff from Assemblyman Grayson's office about how to staff the Green Empowerment Zone and the \$5 million. Staff intends to engage further with the Assembly office on those discussions to see what the County can do to assist that.

Response from Supervisor Glover: I know you're talking about the Green Empowerment Zone, but there are a lot of things going on: Just Transition, Green Empowerment Zone, Northern Waterfront. Are we trying to think in terms of the relationship of all these pieces and come up with a global plan for how they could complement each other?

Response from Supervisor Burgis: I'm going to add to that. We just approved minutes from a meeting from 3 years ago. I think COVID really threw a monkey wrench in a lot of activities, and we also have new staffing. In a lot of ways, we are resetting, and we have these new tools. I think we need to set some expectations and some goals so that we can bring it together.

Response from Supervisor Glover: I posed the question because we need to think about things. The relationship is so intertwined in terms of what the desired outcome is from each of those pieces, and just trying to make sure we're taking advantage of all the opportunities as there are common goals for the outcomes.

Response from John Kopchik: I agree, we are overtly aware there's a danger of overlapping and lack of coordination as there's a lot going on. The pandemic plus those things do present an opportunity for a reset. When the pandemic started, we had all 4 refineries were refining fossil fuels. Early in the pandemic days and since then, 2 of them have switched to renewable fuel sources. One of the key components of the Board's approval of those 2 refinery transformations were a series of detailed conditions to try and ensure that cleanup happened at those facilities, and that we had an eye toward the portions of those sites that may not be needed for refining to be used for other jobs, because these refineries predated county zoning clause. We have that [transformation] for these 2 refineries, and that prompted the whole conversation about Just Transition. The Board hadn't requested an earmark from Congress. That was furthered by Congressman DeSaulnier. And the Green Empowerment Zone didn't exist. There's a lot going on, we're hopeful that county staff through Board direction can play a role in working with all the other partners to be a coordinating force in some way so that that various efforts are positioned as helpful cogs in the same wheel.

F. Business Retention and Expansion

Facilitating new business formation and entrepreneurship

- County economic development staff have assisted over 70 businesses for site selection assistance in the unincorporated areas of the county and referral to partner cities of the northern waterfront. This includes access to capital that includes the COVID-19 microbusiness grant program, access to information about COVID-19 sick time for employees, specialized assistance for business owners such as veterans, minorities and women, services around employee recruitment, support and applying for federal funding including the Chips and Science Act, and business development assistance including access to contracting and grant new market opportunities. Staff have targeted outreach to over 3400 microbusinesses with 5 or fewer employees to support marketing of the COVID-19 microbusiness program.
- Staff will continue to support the retention and expansion of existing small and medium sized businesses in the unincorporated areas by providing business assistance and amplifying economic development highlights.

- The Northern Waterfront Initiative activities are funded by a general fund allocation of \$500,000, dating from 2017 and there is a current balance of \$300,000 for the Northern Waterfront Initiative that has been rolled over from previous years and will cover the costs of the proposed activities.

Comment from Supervisor Burgis: At the TRANSPLAN Committee meeting last week, we had a presentation from CCTA on dynamic personal micro transit. I see GoMentum doing a lot of work here. I think bringing in these transportation entities is important. One of the requirements is that it's made in the U.S. If it's not made in the U.S. and they want to compete for it, I would love to see it here in Contra Costa. The other thing is when promoting the airport system and going to different meetings and conventions, I would like to attend. Sometime an elected official can help get a foot in the door. Please utilize the elected officials in outreach and engagement efforts.

Response from Supervisor Glover: I totally agree with what was said. There are so many opportunities, and we learn so much about what's out there when we are visiting and sharing. You bring up a very good point. I would like to see more engagement in our transportation network as we look at the dynamic tools that are available for the eastern end of the County. GoMentum has an opportunity to spur so many different types of jobs. They County has land as a part of the GoMentum station. Entering a dialogue with Tim Haile of CCTA is important, and I would like to see that take place. As there are opportunities to attend conventions, they can play a role in incentivizing some activity locally.

Response from Supervisor Burgis: Transportation money is attached to housing. Contra Costa gets to build all the affordable housing, but we don't see the jobs. When there's an economic turndown, we don't have the sales tax revenue or the base that other places do. What the Board of Supervisors can do is participate in the legislative part of things as far as connecting jobs to the transportation as well as housing. It's imbalanced when you put housing with transportation. We need to have jobs. I am presenting to the General Assembly at ABAG about economic development in June.

Response from Supervisor Glover: We need to have the jobs where people live so that they can work within the area that they are. We need reverse commutes. One of our great opportunities is the Byron Airport. There needs to

be some engagement with our airport directors. There is open land, and we need to figure out a way to build while we have the open land.

Response from Supervisor Burgis: Alyson got to see the enthusiasm when all these economic development agencies came out and got to see the Byron Airport. It is all interconnected. We're trying to be on the cutting edge of what new emerging technologies are happening. When we have assets like an airport, a waterfront, a workforce, and a proximity to all these other industries, that's something that we can promote.

Response from Alyson: Thank you Supervisors. I appreciate the feedback and taking a lot of notes, so thank you.

5. Public Comment

Call-in User 1 – This is my 1st time joining this committee. My experience in witnessing the economic development in Asia is it is not wise to allow China to come in here and take over the direction and contents of our economic development. Where are these solar panels being made. If they are not made in America, they are built in China.

Marti Roach – It's great that there's a Northern Waterfront Committee meeting. One of the things we lost with COVID was the community engagement. Want us to think about making sure we have all the stakeholders in the room. There's interest from workforce and labor. One idea is more meetings. Suggest meeting monthly as I think we need more updates. We need more access to enable more public participation. The tour of the waterfront would've been a great opportunity if it was marketed to these stakeholder groups. To have active and effective participation, you need to level the playing field and bring information to community groups that care about the future of our communities so they can participate. What about a commission? Like the sustainability commission, like the hazardous materials commission, does this committee need a commission of stakeholders that can also help support this overall effort between the committee and the staff? Glad to be here, appreciate the updates.

Patience Ofodu – formerly with the Workforce Development Board, currently staff with the East Bay Economic Development Alliance, very excited about the prospects and things you are working on. Like the idea of elected officials offering their support to participate in events and business attraction activities.

Michael Moore – Fully supportive of planning the brownfields. Very good comments. We should get grants, we should plan. We have 4 legacy fossil fuel facilities producing petroleum. They still have contamination. We need to plan when they go out of business. You can refurbish those refineries. The SF Bay Water Board cleaned up the groundwater, cleaned up the soil and put Victoria by the Bay. Support Supervisor Glover’s concern about orchestrating Green Empowerment Zone and other efforts.

Charles Davison – Brownfield survey done by the EPA recorded a vast amount of brownfield development possibilities. The report shows the refineries have many square miles of undeveloped property that’s not being used for petroleum processing or other refinery responsibilities. Those areas would be ideal for solar photovoltaic development. Currently there are IRA grants that are very generous that would be available for solar or battery storage and could be used to raise money for what would be above the normal charge for electricity. The funds could be used by the refinery for the benefit of being able to utilize their property. Their money could also go to the community because refineries are in disadvantaged communities. Hope the county can combine the Northern Waterfront Economic Development Initiative and IRA grant possibilities and provide benefits for the County in general and the community.

6. Back to the Committee:

Comments from Supervisor Glover: There has been some great conversations and hopefully when we get back together, we’ll be able to see some of the coordination of the dialogue we had today, and how we move forward in our planning process. Hopes staff will reach out in terms of the various conferences mentioned to see where it makes sense to have participation from Board members.

The Committee adjourned meeting at 11:07 am.



Contra Costa County Board of Supervisors

Subcommittee Report

NORTHERN WATERFRONT ECONOMIC DEVELOPMENT INITIATIVE AD HOC CTE

Meeting Date: 08/02/2023

Subject: RECEIVE presentation from City of Pittsburg on Brownfields Redevelopment (Sara Bellafronte, Assistant to City Manager).

Department: Conservation & Development

Referral No.:

Referral Name: RECEIVE presentation from City of Pittsburg on Brownfields Redevelopment (Sara Bellafronte, Assistant to City Manager).

Presenter: Sara Bellafronte, Assistant to City Manager **Contact:** sbellafronte@pittsburgca.gov

Referral History:

RECEIVE presentation from City of Pittsburg on Brownfields Redevelopment (Sara Bellafronte, Assistant to City Manager).

Referral Update:

See attached presentation

Recommendation(s)/Next Step(s):

Attachments

City of Pittsburg Presentation



City of
Pittsburgh

Brownfields Program

Northern Waterfront Ad Hoc Meeting
August 2, 2023

Pittsburg's Brownfields Program

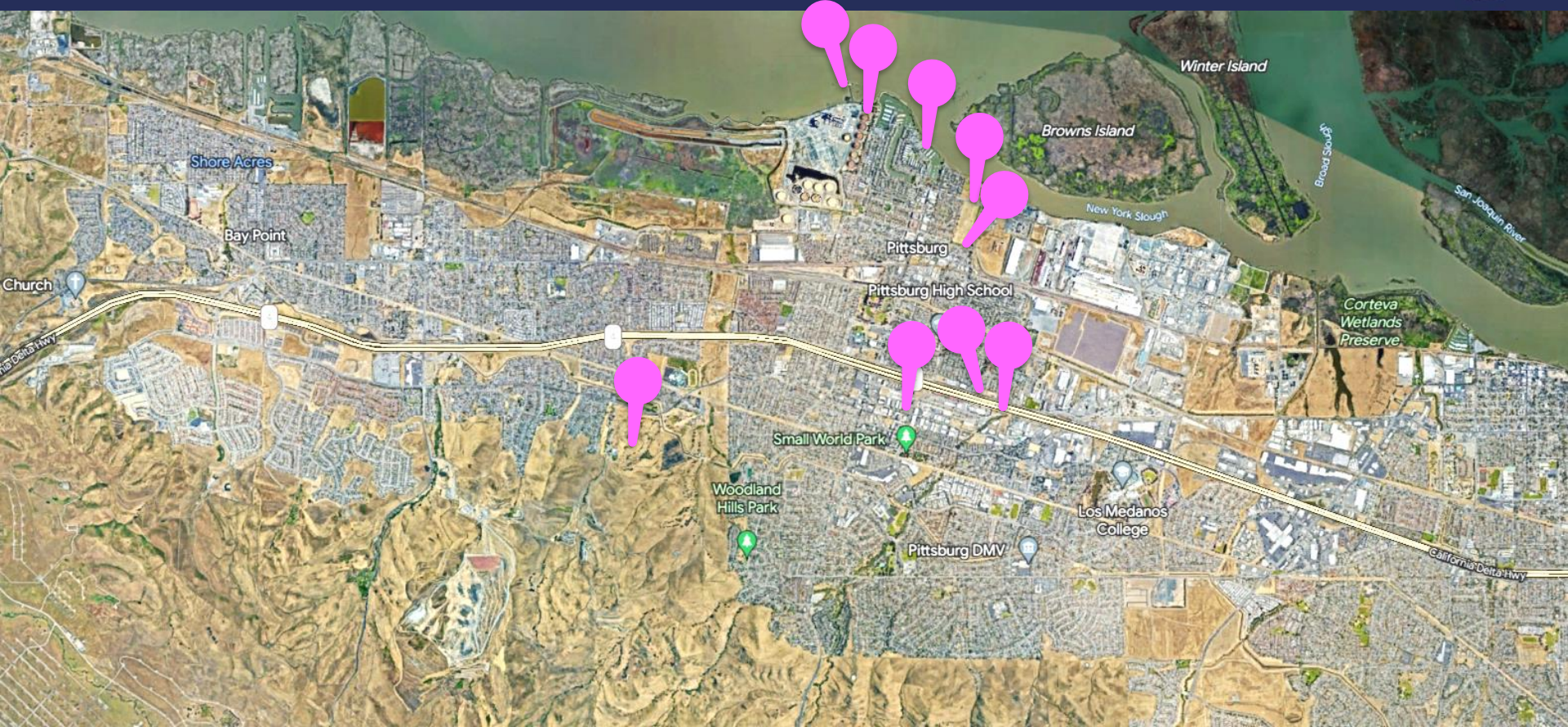


- \$1.1M US EPA Funds
- \$500,000 DTSC ECRG Funds

Phase I ESAs	Phase II ESAs	Future Use Plans	Corrective Action Plans	Remediation
8	6	3	1	Pending

- Appx. \$800,000 remaining

Community-wide



Program Impacts



Program Impacts





Program Impacts



- City-owned
- Blighted
- Dumping



- Adjacent to:
 - Other properties for sale
 - Proposed residential development

Build a Brownfields Program



- Identify need
- Identify funding that's right for you
- Partnerships
- Community engagement
- Property owner pitch
- Understand liabilities and protections
- Ask questions

Build a Brownfields Program



- Identify need



Build a Brownfields Program



- Identify need
- Identify funding that's right for you



Build a Brownfields Program



- Identify need
- Identify funding that's right for you
- **Partnerships & community engagement**

Build a Brownfields Program



CENTER FOR CREATIVE
LAND RECYCLING
RECLAIM. CONNECT. TRANSFORM.



BROWNFIELDS 2023
SUSTAINABLE COMMUNITIES START HERE



Workforce
Development Board
Contra Costa County

Build a Brownfields Program



- Identify need
- Identify funding that's right for you
- Partnerships & community engagement
- **Engage property owners**

Build a Brownfields Program



- Identify need
- Identify funding that's right for you
- Partnerships & community engagement
- Engage property owners
- **Understand liabilities and protections**

Build a Brownfields Program



- Identify need
- Identify funding that's right for you
- Partnerships & community engagement
- Engage property owners
- Understand liabilities and protections
- **Ask questions**

Thank you



Sara Bellafronte

Assistant to the City Manager

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Contra Costa County Board of Supervisors

Subcommittee Report

NORTHERN WATERFRONT ECONOMIC DEVELOPMENT INITIATIVE AD HOC CTE

Meeting Date: 08/02/2023

Subject: RECEIVE Updates from staff and/or PROVIDE direction to staff regarding Northern Waterfront Economic Development Initiative work program.

Department: Conservation & Development

Referral No.:

Referral Name: RECEIVE Updates from staff and/or PROVIDE direction to staff regarding Northern Waterfront Economic Development Initiative work program.

Presenter: Alyson Greenlee **Contact:** 925-655-2783

Referral History:

Since the last meeting of the Northern Waterfront Ad Hoc Committee on May 17, 2023, various elements of the Northern Waterfront Economic Development Initiative have proceeded. This report includes updates on multiple efforts.

Referral Update:

Since the May 17, 2023, meeting of the Northern Waterfront Ad Hoc Committee, various elements of the initiative had proceeded to help advance projects under the Northern Waterfront umbrella. Recent and proposed economic development activity to implement the Northern Waterfront strategic Action Plan includes:

- The application that economic development staff from the County submitted for the Metropolitan Transportation Commission (MTC) Priority Production Areas (PPAs) Pilot Grant Program for \$750,000 in accordance with the direction from the Board of Supervisors in February 2023 for multiple PPAs in Northern Waterfront, namely the PPAs within unincorporated Contra Costa County--Pacheco Manufacturing Zone and Bay Point Industrial Center--and those in the Cities of Concord, Pittsburg, Antioch, and Oakley, was approved for funding on June 28, 2023 for the amount of \$500,000. Economic development staff from the County will work with the four cities that supported the County's proposal to submit an amended Scope of Work, Project Schedule, and Budget to the funded amount that MTC will use to conduct a procurement for the project. A representative from the County will be on the selection panel, the consultant contract will be with MTC and MTC will make payments directly to the consultant upon approval of deliverables identified in the scope of work. It is anticipated that work for this grant award for technical assistance for the planning and infrastructure in the PPAs of the Northern Waterfront will kick off in Fall-Winter 2023 (See Attachment: MTC Project Award Recommendations).
- Economic development staff from the County participated in the Metropolitan Transportation Commission (MTC) General Assembly on June 16, 2023, to highlight in the poster session the Northern Waterfront Economic Development Initiative and the work to bring unmanned aerial vehicle (drone) testing to Bryon Airport and to develop jobs along the Northern Waterfront.
- Economic development staff from the County participated in the Contra Costa Community Economic Resilience Fund (CERF) Table meeting on July 14, 2023, to support the launch of the Contra Costa Sub-Regional Table for outreach to communities that have historically not had input into equitable economic development.
- Economic development staff from the County joined the Cities of Antioch, and Brentwood and other cities around the state in becoming members of the TeamCalifornia, the non-profit membership-based organization that markets California communities and site location assistance for California. Staff participated in the annual members' meeting on July 13, 2023, and onboarding on July 19, 2023. Staff will review the TeamCalifornia calendar of selected trade shows and industry sponsored events based on their fit to identify the best

opportunities to promote Contra Costa County to site selection specialists.

- To support business retention and expansion (BRE) efforts, economic development staff from the County assisted over 30 businesses in accessing services for: business development assistance including purchasing/contracting opportunities with the County, business development assistance including referrals to Cities, access to resources for starting a business in industries such as consulting and construction, applying for federal funding including the CHIPS & Science Act, business ombuds services, specialized assistance for business owners such as veterans, minorities, and women, and support in referrals to partners including city, Small Business Development Center, and community-based partners. Staff will continue to support the retention and expansion of existing small and medium-sized businesses in the unincorporated areas by providing business assistance and amplifying economic development highlights.
- Economic development staff from the County participated in the East Bay EDA's Meet the Innovators on June 20, 2023, which included a presentation by Contra Costa Transportation Agency (CCTA). Staff participated in East Bay Economic Development Alliance (East Bay EDA)'s Resilient East Bay Industrial Lands Working Group meeting on June 28, 2023, to receive the Industrial Lands Snapshot & Profiles and participate in the development of regional industrial Lands toolkit funding by U.S. Economic Development Administration (See Attachment: East Bay Industrial Lands Snapshot and Profiles).
- Economic development staff from the County convened a meeting of the countywide economic development staff on May 24, 2023, along with the staff from the cities of the Northern Waterfront and the Workforce Development Board, to coordinate and collaborate. In Conjunction with Small Business Month, County staff coordinated presentations from Renaissance Entrepreneurship Center, State of California Employment Training Panel, and Contra Costa's Recycling Marketing Development Zone. Staff will convene quarterly meetings in August/September, and November 2023. For the November meeting, staff are coordinating a Contra Costa Countywide Economic Development Forum, which will include updates from state, regional, and local economic development organizations. Staff have identified a date of Wednesday, November 15, 2023, from 9:00 am - noon (Location TBD).
- Economic development staff from the County maintain the economic development webpage with up-to-date information on economic development services; opportunities to do business with the County; funding opportunities for businesses; major projects; resources; and contact information. For the [Northern Waterfront Economic Development Initiative](#), the website is consistently having more activity than this time last year. From Jan 1, 2023 to Jul 9, 2023, there were 774 pages views and 630 visits. For all of 2022, there were 1,132 page views and 915 visits. Staff will update and expand the web presence for the Northern Waterfront Economic Development Initiative, including with new economic data, current trends in target industries, and demographic and labor force data as required by businesses and site selectors (See Attachment: Jul 10 2023 Northern Waterfront Economic Development Initiative Website Analytics).
- In accordance with the policy adopted by the Board of Supervisors on February 22, 2022, economic development staff from the County continue to implement the County's policy on participating in Enhanced Infrastructure Financing Districts (EIFDs).
- In accordance with the Northern Waterfront Economic Development Initiative Strategic Plan, economic development staff from the County will continue to investigate the feasibility of launching a non-profit advanced manufacturing, biomedical/biotech, or cleantech incubator/accelerator to encourage the development of sustainable industries along the Northern Waterfront.
- A Green Empowerment Zone that includes the Northern Waterfront area of the County of Contra Costa was approved by the Legislature on September 28, 2021. The Board of Directors of the Green Empowerment Zone is in the process of being established. Supervisor Gioia has been appointed as the representative for Contra Costa County. The Legislature also approved a \$5,000,000 appropriation for onetime start-up funding. Economic development staff and staff from the Department of Conservation & Development have participated in discussions about how to staff the Green Empowerment Zone and will continue to participate with staff from Assemblymember Grayson's office and the Governor's Office of Business & Economic Development, to ensure that these efforts are coordinated.
- The Northern Waterfront Initiative activities are funded by a General Fund allocation of \$500,000 dating from 2017-2018. There is a current balance of \$300,000 for the Northern Waterfront Initiative that has been rolled over from previous years and will cover costs of the proposed activities.

Recommendation(s)/Next Step(s):

RECEIVE updates from staff and/or PROVIDE direction to staff regarding Northern Waterfront Economic Development Initiative work program.

Staff Presentation

MTC Project Award Recommendations

East Bay Industrial Lands Snapshot and Profiles

Jul 10, 2023 Northern Waterfront Economic Development Initiative Website Analytics

NORTHERN WATERFRONT ECONOMIC DEVELOPMENT INITIATIVE

NORTHERN WATERFRONT AD-HOC COMMITTEE

AUGUST 2, 2023



*Photo: Northern Waterfront Rail and
Water*

ECONOMIC DEVELOPMENT TEAM:



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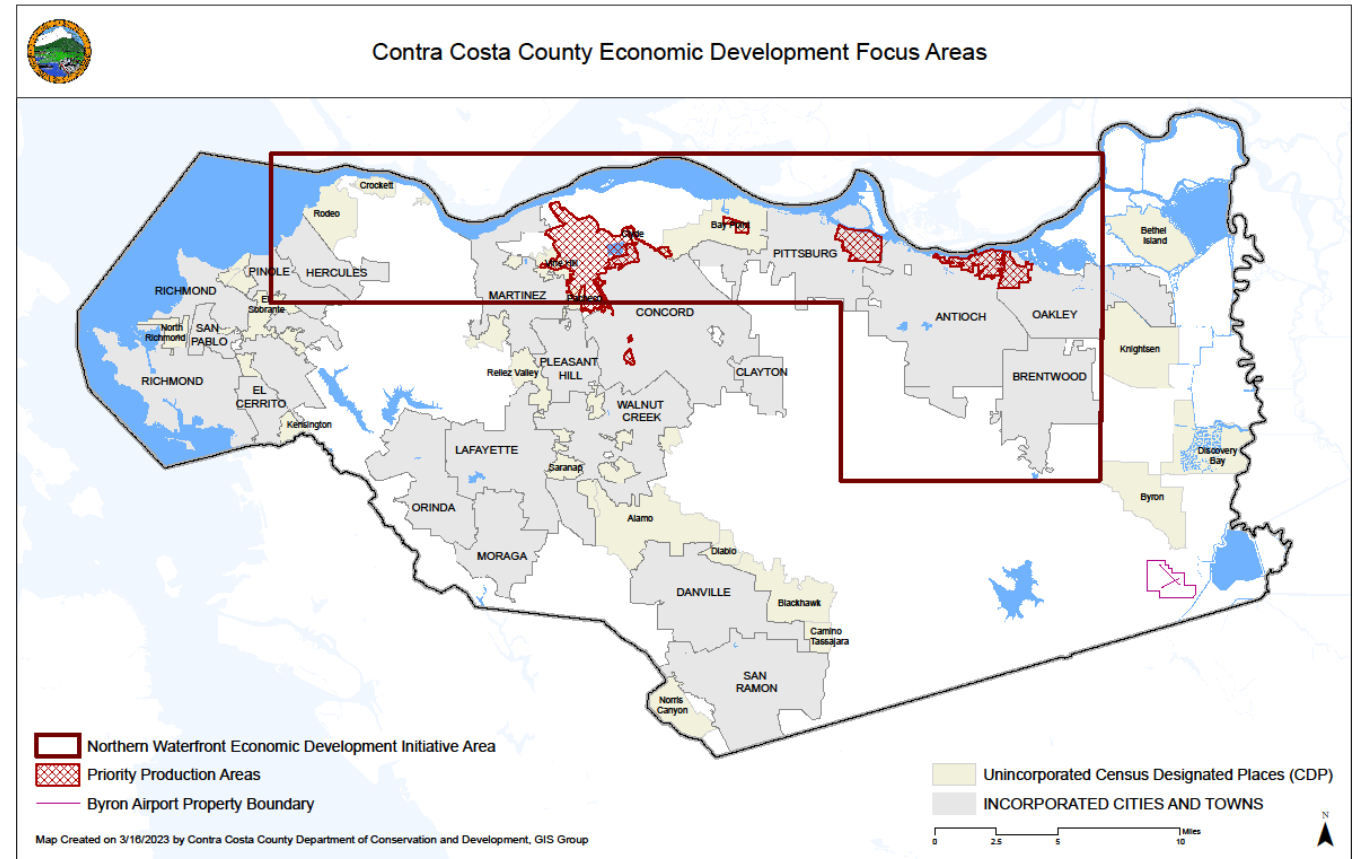
KEY UPDATES ON STRATEGIC PLAN ACTIVITIES



*Photo: National
Manufacturing Day,
2018*

INFRASTRUCTURE CAPACITY

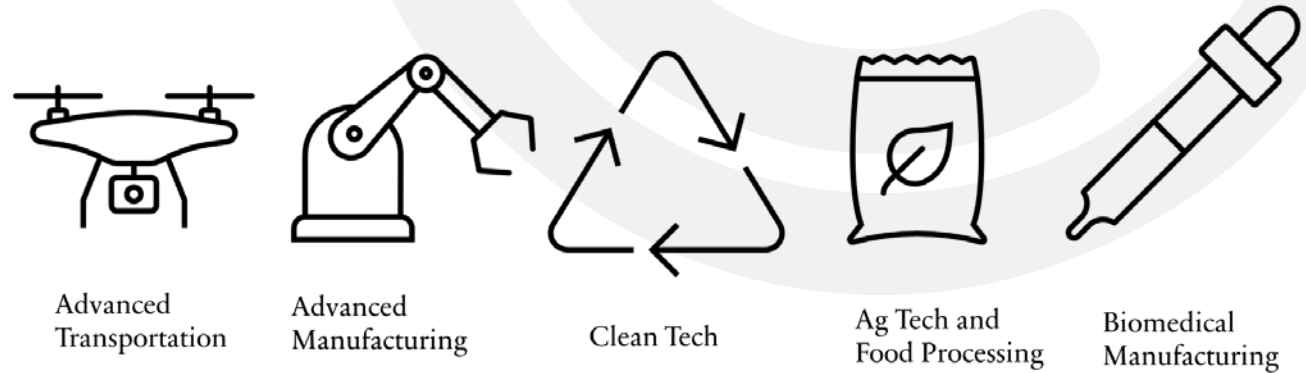
- Northern Waterfront Initiative Priority Production Areas (PPAs) Technical Assistance Project was approved for funding (\$500,000).



Picture: Northern Waterfront Initiative Area

REGIONAL MARKETING

- Contra Costa County joined TeamCalifornia, the non-profit that markets communities and site location assistance for California.



Picture: Northern Waterfront Target Industry Clusters

BUSINESS RETENTION & EXPANSION

- Coordinating a Contra Costa Countywide Economic Development Forum on Wednesday, November 15, 2023.



Photo: Sigray, Winner of 2019 East Bay Innovation Awards

BUSINESS ENVIRONMENT

- Staff from the Department of Conservation & Development have participated in discussions about how to staff the Green Empowerment Zone (GEZ) and will continue to participate to ensure efforts with the GEZ and Northern Waterfront Initiative are coordinated.



Photos: Northern Waterfront Tour

2022-23 Climate Program and Growth Framework Grant Calls for Projects Award Recommendation Summary

Regional Mobility Hubs Project Award Recommendations

Total request received: \$14,562,000

Total recommended award funding request: \$11,286,000

Table 1. Recommended Regional Mobility Hubs Awards *Construction*

County	Project Title	Project Sponsor	Location	Award Request
Contra Costa	Contra Costa College (CCC) Mobility Hub	City of San Pablo	Contra Costa College	\$2,950,000
Contra Costa	Martinez Amtrak Station Shared Mobility Hub	Contra Costa Transportation Authority (CCTA)	Martinez Amtrak Station	\$3,000,000
Regional	Dublin/Pleasanton Access and Station Area Improvements	San Francisco Bay Area Rapid Transit District (BART)	Dublin/Pleasanton BART	\$3,000,000
Santa Clara	San Fernando Street Small-Scale Mobility Hubs	City of San José	Downtown San José. San José State University Main Campus	\$1,140,000

Total: \$10,090,000

Table 2. Recommended Regional Mobility Hubs Awards *Planning and Outreach*

County	Project Title	Project Sponsor	Location	Award Request
Contra Costa	Antioch Park n Ride Mobility Hub	Eastern Contra Costa Transit Authority (Tri-Delta Transit)	Auto Center Dr and West 6th St, Antioch	\$400,000
Marin	Marin County Mobility Hub Plan	Transportation Authority of Marin (TAM)	Numerous around county, including SMART stations and ferry terminals	\$400,000

County	Project Title	Project Sponsor	Location	Award Request
San Francisco	Southeastern SF Mobility Hub Plan	San Francisco Municipal Transportation Agency (SFMTA)	Balboa Park BART 3rd, Palou/Oakdale Caltrain Hub	\$396,000

Total: \$1,196,000

Table 3. Mobility Hubs - Proposals Not Recommended for Funding During Current Round

Staff will work with the project sponsors to assist in the development of an application for the next round of Program funding.

County	Project Title	Project Sponsor	Project Evaluation	Award Request
San Mateo	Millbrae Downtown Micro-Mobility Hub (Construction)	City of Millbrae	The City was awarded a Pilot Mobility Hubs grant in 2021. Recommend the City reapply in the 2024 grant cycle when the pilot project has been able to progress into implementation so that lessons learned can be incorporated into future hubs	\$526,000
Sonoma	Comstock Mall Mobility Hub (Construction)	City of Santa Rosa	Project is to improve an area across from the Santa Rosa Transit Mall and may be better suited to other grant opportunities that are focused on active transportation improvements. MTC staff will work with the City to determine if the project can include improvements at the Santa Rosa Transit Mall and	\$2,750,000

County	Project Title	Project Sponsor	Project Evaluation	Award Request
			to apply in the 2024 grant cycle	

Total: \$3,276,000

Parking Management Project Award Recommendations

Total request received: \$11,817,000

Total recommended award funding request: \$7,606,000

Table 4. Recommended Parking Management Awards – Capital

County	Project Title	Project Sponsor	Location	Recommended Award
Alameda	Demand-Based Parking Pricing and Curb Management Strategies in Business Districts and Ferry Terminals	City of Alameda	Webster Street Area, Park Street Area, and ferry terminals	\$742,000
Alameda	OakPark+	City of Oakland	Various metered parking areas	\$1,500,000
Contra Costa	Parking Meter Program Update	City of Martinez	Downtown Martinez	\$875,000
Regional	BART Variable Parking Pricing Project	SF Bay Area Rapid Transit District (BART)	Systemwide	\$1,147,000
San Francisco	Port of San Francisco-San Francisco Municipal Transportation Agency Parking Management Pilot	Port of San Francisco	Various Port of San Francisco public parking lots	\$200,000
San Francisco	Pay or Permit Parking Program Expansion	San Francisco Municipal Transportation Agency	Select residential parking permit areas	\$1,494,000

Total: \$5,958,000

Table 5. Recommended Parking Management Awards – Planning

County	Project Title	Project Sponsor	Location	Recommended Award
Contra Costa	Planning Study to Implement Parking Technology Solutions in Concord Downtown	City of Concord	Downtown Concord	\$80,000
Contra Costa	Downtown Lafayette Parking Management Program	City of Lafayette	Downtown Lafayette	\$170,000
Contra Costa	Downtown Curbside Management Plan	City of Walnut Creek	Downtown Walnut Creek	\$195,000
Marin	Sausalito Downtown Parking Study	City of Sausalito	Downtown Sausalito	\$106,000
Napa	Park Napa Plan	City of Napa	Downtown Napa	\$315,000
San Mateo	Menlo Park Citywide Strategic Parking Plan	City of Menlo Park	Citywide	\$125,000
San Mateo	Citywide Parking Requirement Update	City of San Mateo	Citywide	\$200,000
Solano	Downtown/Waterfront Parking Management Program Evaluation and Action Plan	City of Vallejo	Downtown and Waterfront in Vallejo	\$150,000
Sonoma	Downtown Area Parking Management Plan	City of Petaluma	Downtown Petaluma	\$100,000
Sonoma	Downtown Parking, Curb Management and Access Plan	City of Santa Rosa	Downtown Santa Rosa	\$207,000

Total: \$1,648,000

Table 6. Parking Management - Proposals Not Recommended For Funding During Current Round

Staff will work with the project sponsors to assist in the development of an application for the next round of Program funding.

County	Project Title	Project Sponsor	Project Evaluation	Award Request
<i>Capital</i>				
Solano	Parking Access and Revenue Control System	City of Fairfield	Application did not meet program requirements of providing greenhouse gas reduction benefits as most of the funds would be directed to improve the physical aspects of the parking facility. MTC staff will work with the City to determine if the project can include parking management practices and to apply in the 2024 grant cycle	\$1,044,000
Sonoma	City of Santa Rosa Parking Management	City of Santa Rosa	Since agencies are limited to receiving one parking management grant per cycle, the City of Santa Rosa is being recommended for its planning grant request only	\$1,107,000
<i>Planning</i>				
Alameda	Planning for OakPark+	City of Oakland	Since agencies are limited to receiving one parking management grant per cycle, the City of Oakland is being recommended for its capital grant request only	\$400,000

County	Project Title	Project Sponsor	Project Evaluation	Award Request
Alameda	Union City Intermodal Station Mobility Hub Feasibility Study	City of Union City	Application was incomplete and did not have a parking management scope	\$300,000
Sonoma	Sonoma County Administration Center Parking Management Plan	County of Sonoma	Application did not meet program requirements of providing greenhouse gas reduction benefits as most of the funds would be directed to improve the physical aspects of the parking facility. MTC staff will work with the City to determine if the project can include parking management practices and to apply in the 2024 grant cycle	\$260,000

Total: \$4,211,000

Growth Framework Award Recommendations

Total request received (call for projects): \$20,654,725

Total recommended award funding request (call for projects): \$17,000,000

Total previously awarded through the County & Local OBAG3 program: \$1,594,000

Program total: \$18,594,000

Table 7. Recommended PDA Awards

County	Project Title	Project Sponsor	Grant Type	Award Request	Recc'd Award	Estimated New Homes ¹
Alameda	Bay Fair TOD Specific Plan Amendment ^{2,4}	City of San Leandro	Plan Amendment	\$600,000	\$600,000	5,100
Alameda	Bay Fair TOD Sub-Area 1 Precise Plan ^{2,4}	City of San Leandro	Plan	\$1,200,000	\$1,200,000	4,000
Alameda	San Lorenzo Village Specific Plan ^{3,4}	County of Alameda	Plan	\$600,000	\$600,000	500
Contra Costa	Mapping a Path Forward for Affordable Housing TOD at the Orinda BART Station ²	City of Orinda	Plan Implementation	\$200,000	\$200,000	1,100
Contra Costa	Moraga Center Specific Plan Amendments ^{3,5}	Town of Moraga	Plan Implementation	\$87,725	\$87,725	1,100
Contra Costa	Moraga Center Specific Plan ^{3,5}	Town of Moraga	Plan Amendment	\$600,000	\$600,000	1,100
San Francisco	Well-Resourced PDAs Zoning Plan ^{2,5}	City of San Francisco	Plan	\$1,035,000	\$1,035,000	36,200
San Mateo	El Camino Real Streetscape Plan Implementation ^{2,4}	City of Millbrae	Plan Implementation	\$200,000	\$200,000	700
San Mateo	MSASP Amendment - Integrated Multi-Modal Transit Station ²	City of Millbrae	Plan Amendment	\$600,000	\$600,000	400
San Mateo	Downtown Together Downtown Specific Plan ^{2,5}	City of San Carlos	Plan Amendment	\$300,000	\$300,000	800

County	Project Title	Project Sponsor	Grant Type	Award Request	Recc'd Award	Estimated New Homes ¹
Santa Clara	Hamilton Avenue Precise Plan ^{2, 5}	City of Campbell	Plan	\$400,000	\$400,000	1,500
Santa Clara	Innovation District Parks and Trails Master Plan ^{2, 5}	City of Milpitas	Plan Implementation	\$200,000	\$200,000	600
Santa Clara	Milpitas Main Street Sense of Place Plan ^{2, 5}	City of Milpitas	Plan Amendment	\$600,000	\$600,000	1,100
Solano	Eastern Gateway Infrastructure Master Plan ³	City of Benicia	Plan Amendment	\$317,000	\$312,275	tbd
Solano	PDA Project Implementation ^{2, 4}	City of Suisun City	Plan Implementation	\$200,000	\$200,000	1,600
Solano	Downtown Plan Update and Streetscape Design ^{2, 4}	City of Vallejo	Plan	\$1,200,000	\$1,200,000	2,300 ⁶
Solano	Waterfront Plan Update ^{2, 4}	City of Vallejo	Plan	\$1,200,000	\$1,200,000	1,100 ⁶
Solano	Solano Rail Hub Residential Cluster ^{2, 4}	City of Fairfield	Plan Implementation	\$200,000	\$200,000	1,000
Solano	Allison Policy Plan ³	City of Vacaville	Plan	\$1,200,000	\$1,200,000	tbd
Sonoma	Santero Way Specific Plan Update ^{2, 3}	City of Cotati	Plan Amendment	\$415,000	\$415,000	300
Sonoma	Corona Road SMART Station PDA Specific Plan ^{2, 5}	City of Petaluma	Plan	\$1,150,000	\$1,150,000	1,300
Sonoma	South Santa Rosa Specific Plan ^{3, 4}	City of Santa Rosa	Plan	\$1,200,000	\$1,200,000	2,100
Sonoma	Workforce Housing Zoning ^{3, 5}	City of Sebastopol	Plan Amendment	\$250,000	\$250,000	200
Sonoma	Airport Area Specific Plan Update ^{2, 3}	County of Sonoma	Plan	\$800,000	\$800,000	900
Total: Call for Projects				\$14,754,725	\$14,750,000	65,000
Marin	North San Rafael/Northgate Area PDA Study ^{2, 4}	City of San Rafael	Plan	\$900,000 ⁸	\$797,000 ⁷	tbd

County	Project Title	Project Sponsor	Grant Type	Award Request	Recc'd Award	Estimated New Homes ¹
Marin	Southeast San Rafael/Canal Area PDA Study ^{3,4}	City of San Rafael	Plan	\$900,000 ⁸	\$797,000 ⁷	tbd

Total: OBAG3 County & Local Program Awards \$1,594,000

Grand Total \$16,344,000

1. Estimated increase in development capacity facilitated by grant funding through updates to development standards, removal of obstacles to implementation of an adopted plan, or other measures.
2. Includes areas that are subject to [Transit-Oriented Communities \(TOC\) Policy](#)
3. [Connected Community PDA](#)
4. Fully or partially within a Census Tract identified by MTC as an [Equity Priority Community](#)
5. Fully or partially within Census Tract identified as “High” or “Highest” Resource on the 2023 California Tax Credit Allocation Committee (TCAC) [Opportunity Map](#).
6. Source of estimate is existing plan to be fully updated through grant
7. Award approved by Commission in January 2023 through the OBAG3 County & Local Program
8. Refers to funding request from City of San Rafael to the Transportation Authority of Marin (TAM) through the OBAG3 County & Local Program. TAM recommended the project for funding at \$797,000—the amount approved by the Commission for these projects in January 2023.

Table 8. PDAs - Proposals Not Recommended for Funding During Current Round

The following applications were withdrawn during the review process. Contingent upon local support, staff will work with the project sponsors to assist in the development of an application for the next round of Program funding.

County	Project Title	Project Sponsor	Grant Type	Project Evaluation	Award Request
Santa Clara	Moffett Boulevard Precise Plan	City of Mountain View	Plan	Withdrawn by local jurisdiction	\$1,200,000
Santa Clara	Downtown Precise	City of Mountain View	Plan	Withdrawn by local jurisdiction	\$1,200,000
Total					\$2,400,000

Table 9. Recommended PPA Awards

County	Project Title	Project Sponsor	Grant Type	Award Request	Recommended Award
Alameda	Leading the Next Generation of East Bay Industrial Buildings & Districts	East Bay Economic Development Alliance	Multi-jurisdictional Technical Assistance	\$750,000	\$500,000
Contra Costa	Northern Waterfront Priority Production Areas Technical Assistance Project	County of Contra Costa	Multi-jurisdictional Technical Assistance	\$750,000	\$500,000
Solano	Port of Benicia - Infrastructure & Facility Modernization Plan	City of Benicia	Plan	\$750,000	\$750,000
Solano	Aligning middle wage jobs with housing in Solano County	Solano Transportation Authority	Multi-jurisdictional Technical Assistance	\$750,000	\$500,000
Total				\$3,000,000	\$2,250,000

Table 10. PPA - Proposals Not Recommended for Funding

If additional funding becomes available to support the PPA Program, staff will work with the project sponsors to assist in the development of an application for future grant rounds.

County	Project Title	Project Sponsor	Grant Type	Project Evaluation	Award Request
San Francisco	Concrete Building Inventory for an Earthquake Resilient PPA	City and County of San Francisco	Single jurisdiction Technical Assistance	Success of proposal contingent upon subsequent grants to property owners to hire engineers to assess seismic risk, reducing potential for direct benefits and regional transferability. Proposal shared with ABAG/MTC Resiliency Team to identify other potential funding opportunities.	\$250,000
Sonoma	Cotati Business Park Zoning Enhancements	City of Cotati	Single jurisdiction Technical Assistance	Proposal to attract retail and entertainment conflicted with program goals to maintain and preserve industrial uses in PPAs and was therefore considered ineligible.	\$250,000
Total					\$500,000

East Bay Industrial Land

Industrial Market Insights & Subarea Profiles

Resilient East Bay:
Industrial Land Use Analysis &
Implementation Toolkit Part I

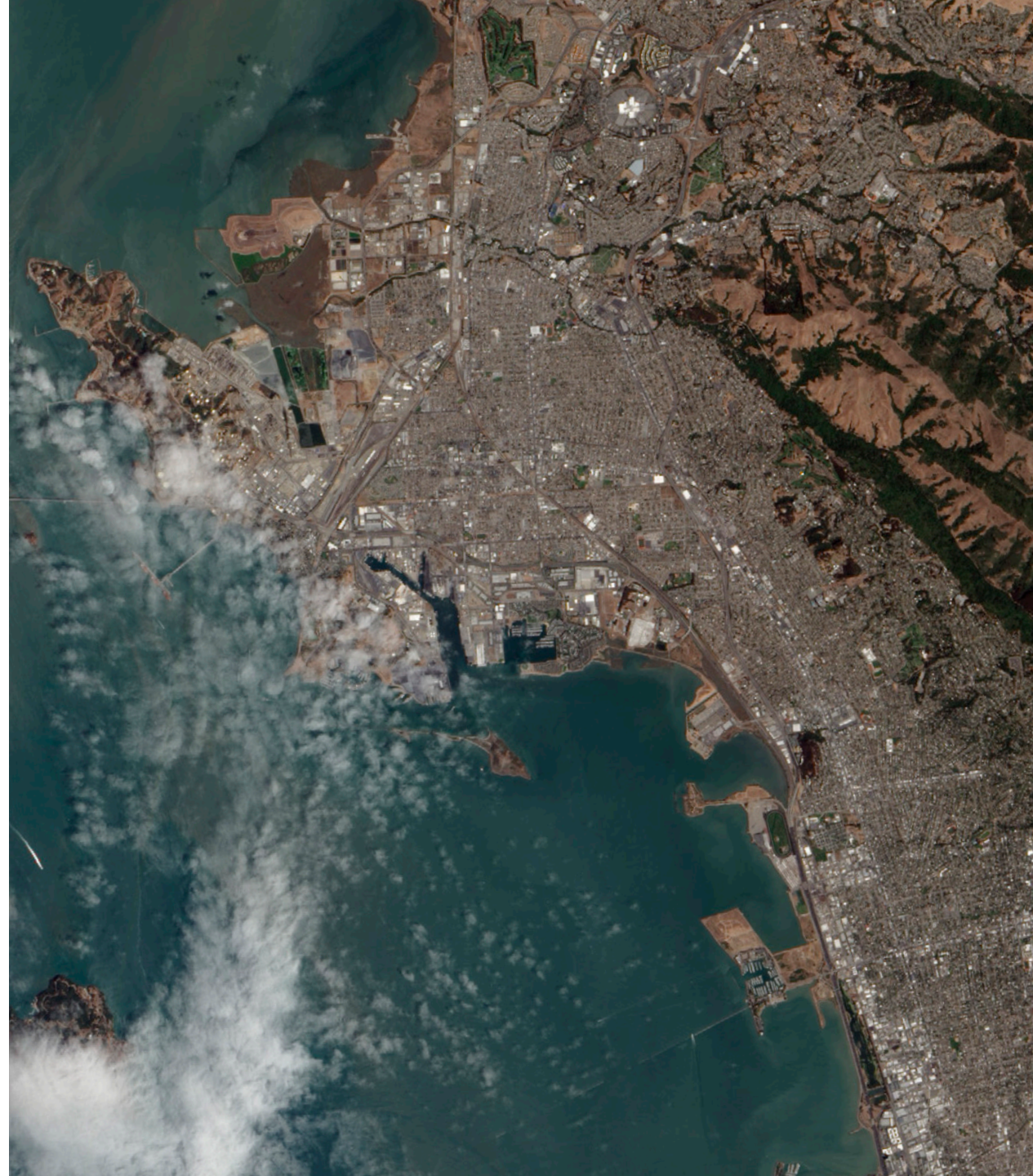


MAY 2023

Purpose of This Report

The purpose of this report is to provide a “snapshot” overview of industrial activity in the East Bay over the past ten years. The results indicate that the East Bay has robust job growth in key industry groups that utilize land and buildings in areas with industrial related zoning. These findings can inform cities within the East Bay as to the importance of their industrial land supply and will provide the foundation for preparing the Industrial Land Use Implementation Toolkit. The toolkit will assist cities in finding approaches to support ongoing economic innovation and investment in their industrial zoned areas. Implementation related topics, including addressing ongoing challenges with electrical supply, will be addressed in the toolkit document.

Report Section	Contents
Job Growth	Employment by sector and subarea with changes from 2011-2021
Industrial Buildings	Inventory and tenant information with changes from 2011-2023 YTD
Market Statistics by Building Type	Inventory, rent, and vacancy statistics by building type from 2013- 2023 YTD
Subarea Profiles	Jobs, building inventory and market statistics, and qualitative findings by subarea
Appendix	CoStar definitions and NAICS codes used
Upcoming Report	<i>The Industrial Lands Implementation Toolkit will be available in fall 2023.</i>



Acknowledgements

The Resilient East Bay Industrial Land Use Analysis and Implementation Toolkit was informed and developed with extensive input from East Bay stakeholders through the East Bay Industrial Lands Working Group. We are grateful for the contributions to the following organizations and individuals who have supported the development of the Industrial Land Use Analysis and Implementation Toolkit.

- Abraham Salinas – City of Brentwood
- Ada Chan – ABAG & MTC
- Alyson Greenlee – Contra Costa County
- Anne Stedler – City of Newark
- Ben Ulrey – City of Concord
- Brandon Cardwell – City of Livermore
- Brianna Robles – JLL
- Carolyn Clevenger – Alameda County Transportation Commission
- Christina Ocon – Agency C5
- Cindy Lemaire – City of San Leandro
- Claudia Tarpin – Prologis
- Collette Hanna – City of Walnut Creek
- Cynthia Kroll
- Darin Cline – PG&E
- Dhez Woodworth – City of San Leandro
- Donovan Lazaro – City of Fremont
- Ed Del Beccaro – TRI Commercial Real Estate
- Elizabeth Redman Cleveland – City of Berkeley
- Eric Fonstein – City of Alameda
- Eric Simundza – City of Oakland
- Forrest Ebbs – City of Antioch
- Frank Abejo – City of Concord
- Geoffrey Sears – Wareham Development
- George Carter – Contra Costa County
- Greg Armstrong – NorCal NECA
- Greg Matter - JLL
- Gregory Theyel – Biomedical Manufacturing Network
- Gloria Ortega – City of Union City
- Hannah Curtin – City of Oakland
- Hazel Wetherford – City of Dublin
- Jason Bernstein – ProLogis
- Jason Ovidia - JLL
- Jennifer Fothergill – NorCal NECA
- Jeremy Lochirco – City of Hayward
- Joe Ernst – srmERNST Development Partners
- Joel Schrenk – NorthPoint Development
- John McManus – Cushman & Wakefield
- Jordan Davis – City of Pittsburg
- Jordan Klein – City of Berkeley
- Katie Bowman – City of San Leandro
- Katrinka Ruk – Council of Business and Industry of West Contra Costa County
- Kieron Slaughter – City of Berkeley
- Kwame Reed – City of Antioch
- Lisa Adamos – City of Pleasanton
- Lizeht Zepeda – City of Richmond
- Lois Butler – City of Alameda
- Marie Suvansin – City of Concord
- Melinda Denis – City of Pleasanton
- Ricardo Noguera – City of Brentwood
- Shawnee Keck – City of Oakland
- Susan McCue – Alameda County
- Timur Tecimer – Overton Moore Properties
- Vikrant Sood – ABAG & MTC
- Will Parker – Trammell Crow Company

East Bay Subareas

Each East Bay city is unique, but there are also some industrial land characteristics shared among neighboring cities. We used these shared characteristics to define six subareas within the East Bay.

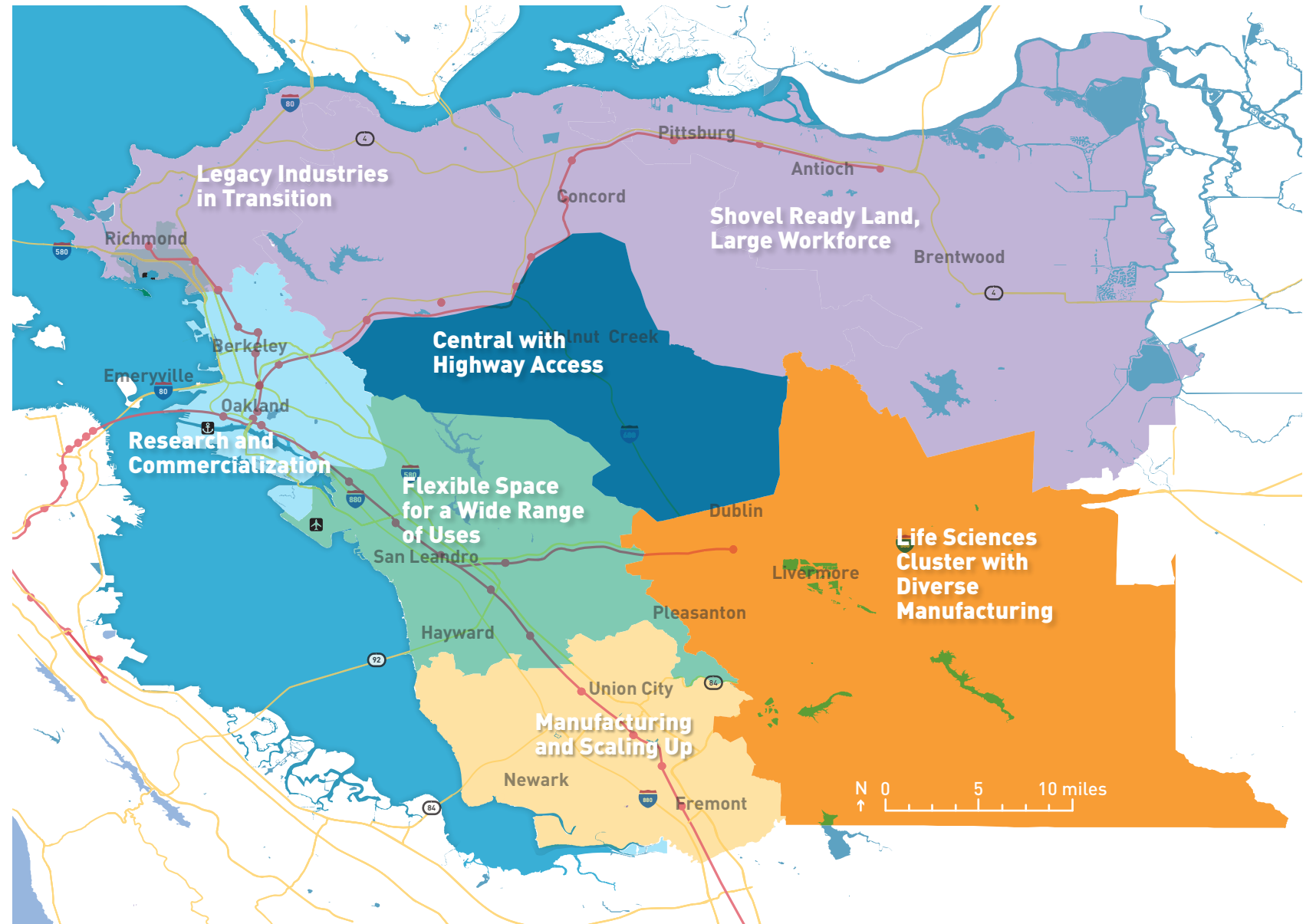
Note: See appendix for list of cities by subarea.



The East Bay Is An Industrial Ecosystem

Data analysis and stakeholder interviews show that rather than standing alone, East Bay cities have complementary assets and opportunities that can support all stages of the industrial life cycle.

Cooperatively building on these assets and opportunities will make each city's local economy stronger.



Industrial Job Growth

An aerial night photograph of a city, showing a dense network of glowing orange and yellow lights representing buildings and streets. A large, dark, irregularly shaped area is visible in the upper right and center, possibly representing a park or undeveloped land. The overall scene is illuminated by the city lights against a dark sky.

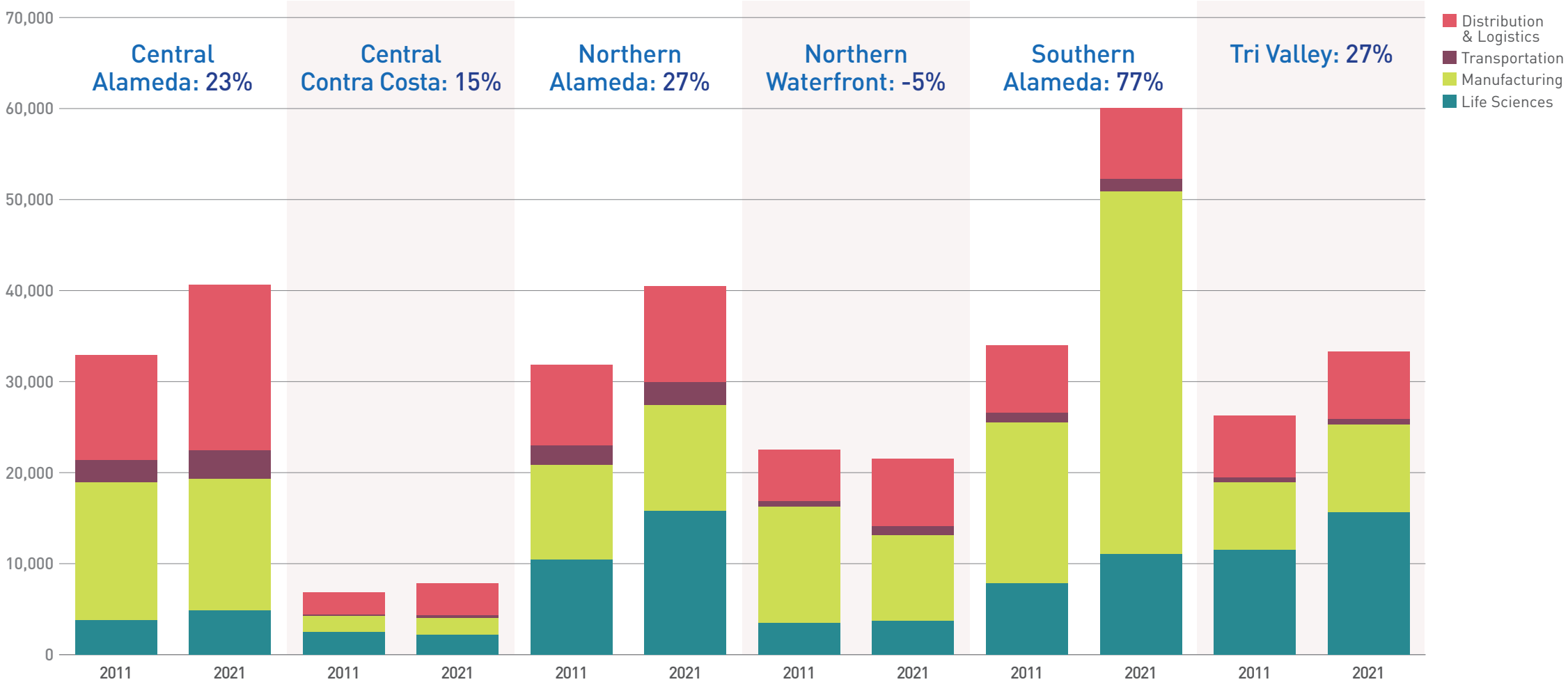
Industrial Job Growth in the East Bay

- This analysis focuses on four industry groups: Life Sciences, Manufacturing, Transportation, and Distribution/Logistics
- These four industry groups drove job growth in the East Bay, adding over 49,000 jobs from 2011-2021
- This growth also represents an increasing share of the region’s jobs between 2011 and 2021, accounting for 18% of total regional jobs in 2021, a 2 percent increase over 2011
- The rate of job growth change in the four industry groups was double that of total regional job rate of change from 2011 to 2021
- Of the four industry groups, Manufacturing represents the largest number of jobs and had the largest job growth over the ten-year period
- Life Sciences jobs are also rapidly increasing and in 2021 had almost as many jobs as Distribution and Logistics

Industry	2011 Jobs	2021 Jobs	Job Change 2011-2021	% Change 2011-2021
Life Sciences	39,684	53,304	13,620	34%
Manufacturing	64,956	86,566	21,610	33%
Transportation	7,061	9,107	2,046	29%
Distribution and Logistics	42,668	54,789	12,121	28%
East Bay Industrial Jobs Total	154,369	203,766	49,397	32%
East Bay Total Regional Jobs	949,286	1,104,887	155,601	16%
Industrial Jobs as Share of Regional Jobs	16%	18%		2%

Source: Lightcast, 2023; Strategic Economics, 2023.
 Note: All categories are exclusive to prevent double counting of jobs. More detailed data is available by request from EBEDA. See Appendix for full list of NAICS codes considered in these figures

Industrial Job Growth in East Bay Subareas



Sources: Lightcast, 2023; Strategic Economics, 2023.

Employment

Manufacturing

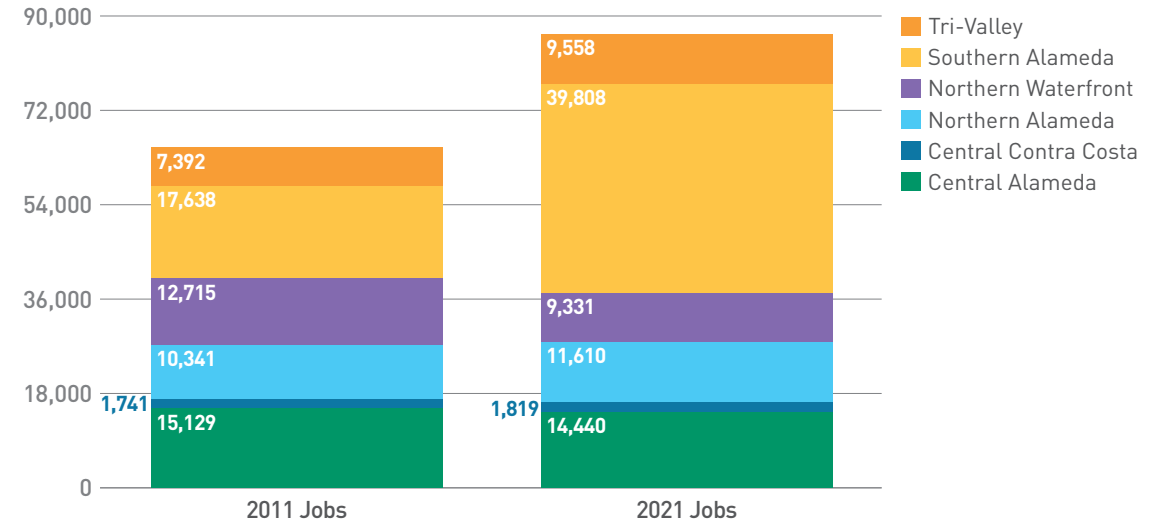
- The majority of manufacturing job growth was in Southern Alameda, reflecting the area’s easy access to the region’s workforce, its technology-driven industry mix, and available land supply
- Most subareas added some manufacturing jobs demonstrating that this activity can thrive in most places in the region
- The Northern Waterfront experienced a decline in manufacturing jobs, largely due to the region’s ongoing transition from its legacy industries related to petroleum refining, but it is anticipated that this trend will reverse in future years

- In today’s world, all “manufacturing” is “advanced” in that significant technology and investment is required and the jobs that are created offer similar wages for similar skills

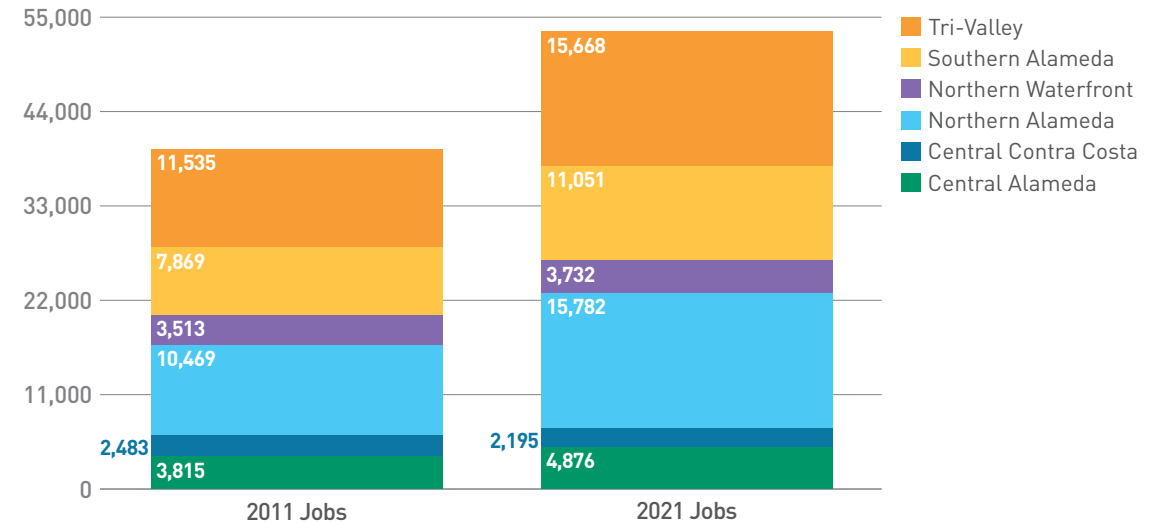
Life Sciences

- Industrial life sciences jobs are emerging as an East Bay strength
- Most subareas added some life sciences jobs with the most significant growth in Northern Alameda, Tri-Valley, and Southern Alameda
- Access to a highly skilled work force and proximity to academic research labs are key location drivers for this industry

Total Manufacturing Jobs in the East Bay



Total Life Science Jobs in the East Bay



Sources: Lightcast, 2023; Strategic Economics, 2023.

Employment

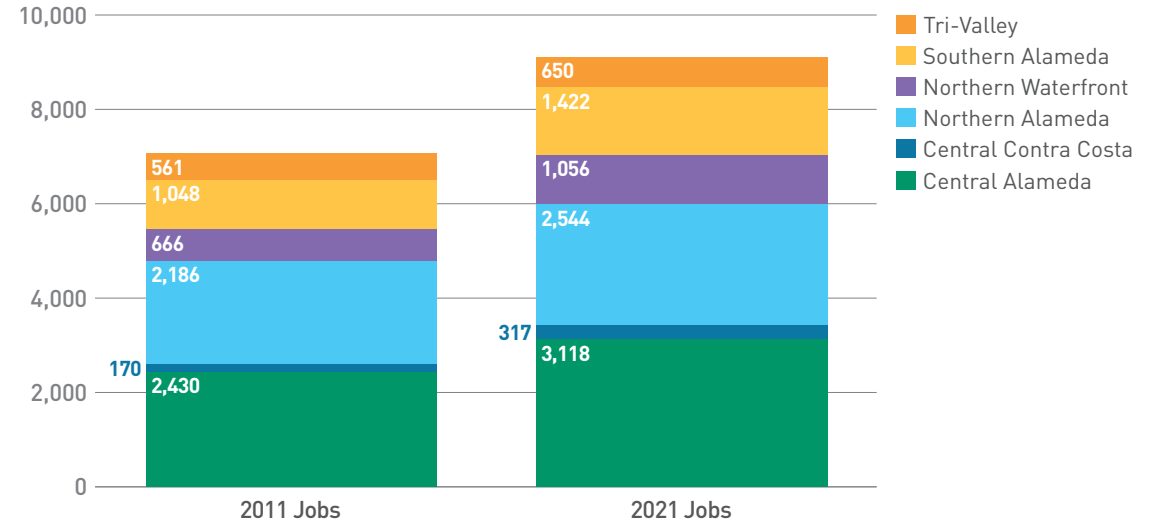
Transportation

- Job growth in transportation is primarily in “other support services for transportation”, which includes jobs in packing goods for shipment, pipeline terminal facilities, and more
- Majority of transportation job growth is in Central Alameda, with most of its growth in other support services for transportation, followed by the Northern Waterfront, with most of its growth in general freight trucking
- All subareas added some transportation jobs
- This constitutes the smallest industrial sector in the East Bay in number of jobs

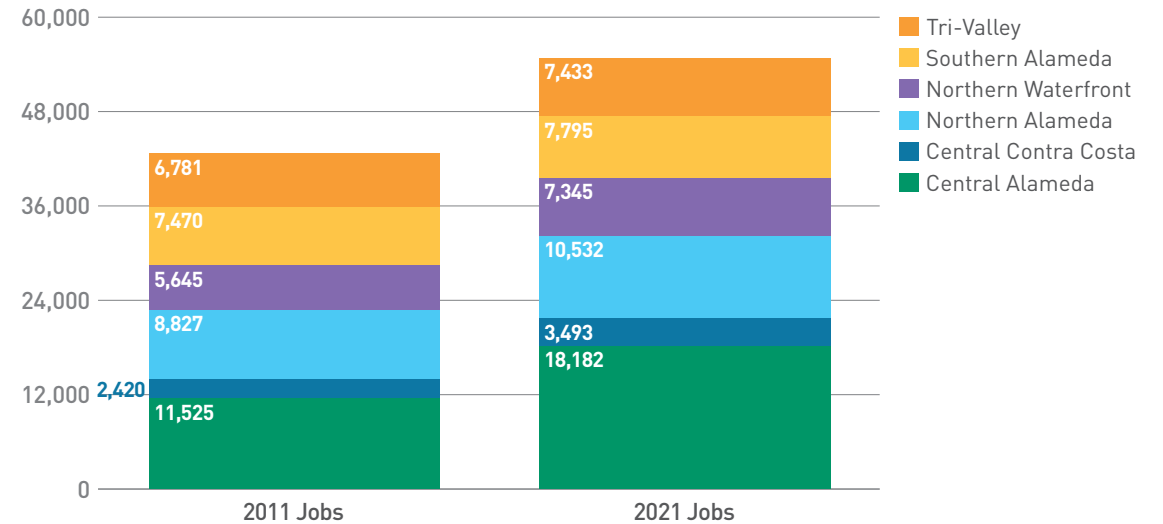
Distribution and Logistics

- Majority of distribution and logistics job growth is in Central Alameda, followed by the Northern Waterfront
- All subareas added some distribution and logistics jobs
- This is the second largest industrial sector in the East Bay but is not growing as quickly as others
- Distribution and logistics jobs are now growing more quickly further east than the East Bay region due to lower costs of land, labor, and housing
- Most industrial businesses require some distribution and logistics activities, some of which may be managed by the individual company and some that may be outsourced to a Distribution and Logistics company likely to be located in the East Bay

Total Transportation Jobs in the East Bay



Total Distribution and Logistics Jobs in the East Bay



Sources: Lightcast, 2023; Strategic Economics, 2023.

Industrial Buildings



Industrial Inventory in the East Bay

- The East Bay had a net loss of 33 industrial buildings from 2013-2023 despite new construction
- The square footage of the total industrial inventory has increased 4.2% despite net building losses
- The vast majority of building losses were demolitions, not adaptive reuse
- Demolitions resulted in mixed outcomes with some conversions to other uses, such as residential, and some new industrial buildings with different sizes and configurations than the demolished, obsolete buildings
- Majority of the inventory loss was in Northern Alameda
- Warehouse and distribution style buildings represent the greatest percentage increase in the industrial building inventory, but many types of businesses and jobs are present in these buildings

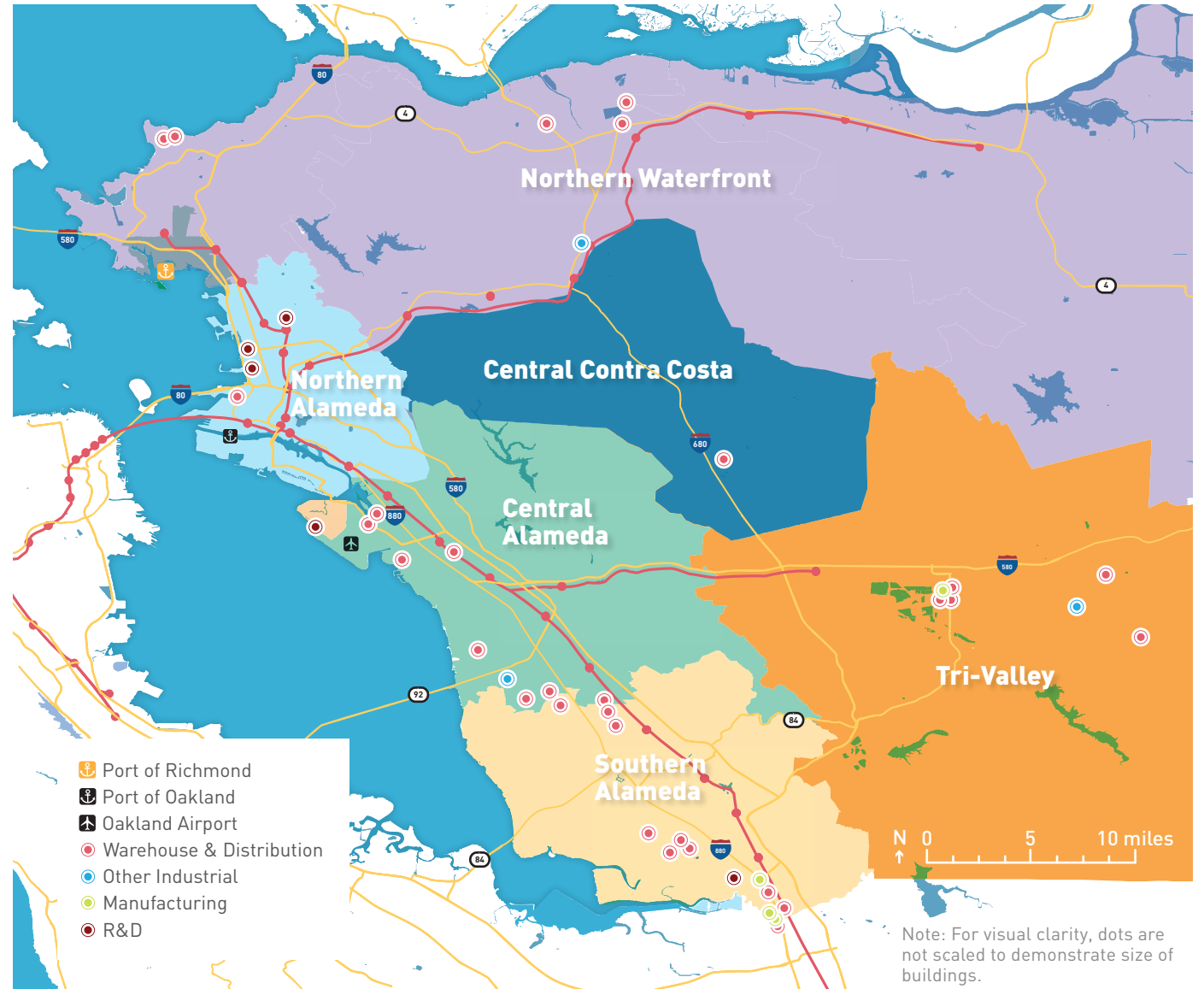
East Bay	NUMBER OF BUILDINGS			SQUARE FEET			
	2013	2023 YTD	Net Change	2013	2023 YTD	Net Change	% Change
Manufacturing	1,419	1,405	-14	58,848,599	59,250,574	401,975	0.7%
R&D	718	719	1	28,136,532	28,497,006	360,474	1.3%
Other Industrial	273	267	-6	3,189,706	3,090,994	(98,712)	-3.1%
Warehouse & Distribution	4,920	4,906	-14	140,671,440	149,771,095	9,099,655	6.5%
Total	7,330	7,297	-33	230,846,277	240,609,669	9,763,392	4.2%

Sources: CoStar2023; Strategic Economics, 2023.
 Note: For additional information on building classifications and definitions, see appendix.

East Bay Flex & Industrial Buildings Built from 2012-2017

New Industrial Buildings: Built 2012-2017

- New buildings from 2012-2017 demonstrate disbursed investment among subareas
- Many of the new buildings were along major corridors
- Warehouse & Distribution buildings were the most common additions and were built in all subareas



Building Type	Total Buildings Added	Total Square Feet Added	Average Size of Buildings (sf)
Manufacturing	4	1,210,901	302,725
Other Industrial	3	174,409	58,136
R&D	5	403,259	80,652
Warehouse & Distribution	36	6,729,592	186,933

Note: For additional information on building classifications and definitions, see appendix.
Sources: CoStar 2023; Strategic Economics, 2023.

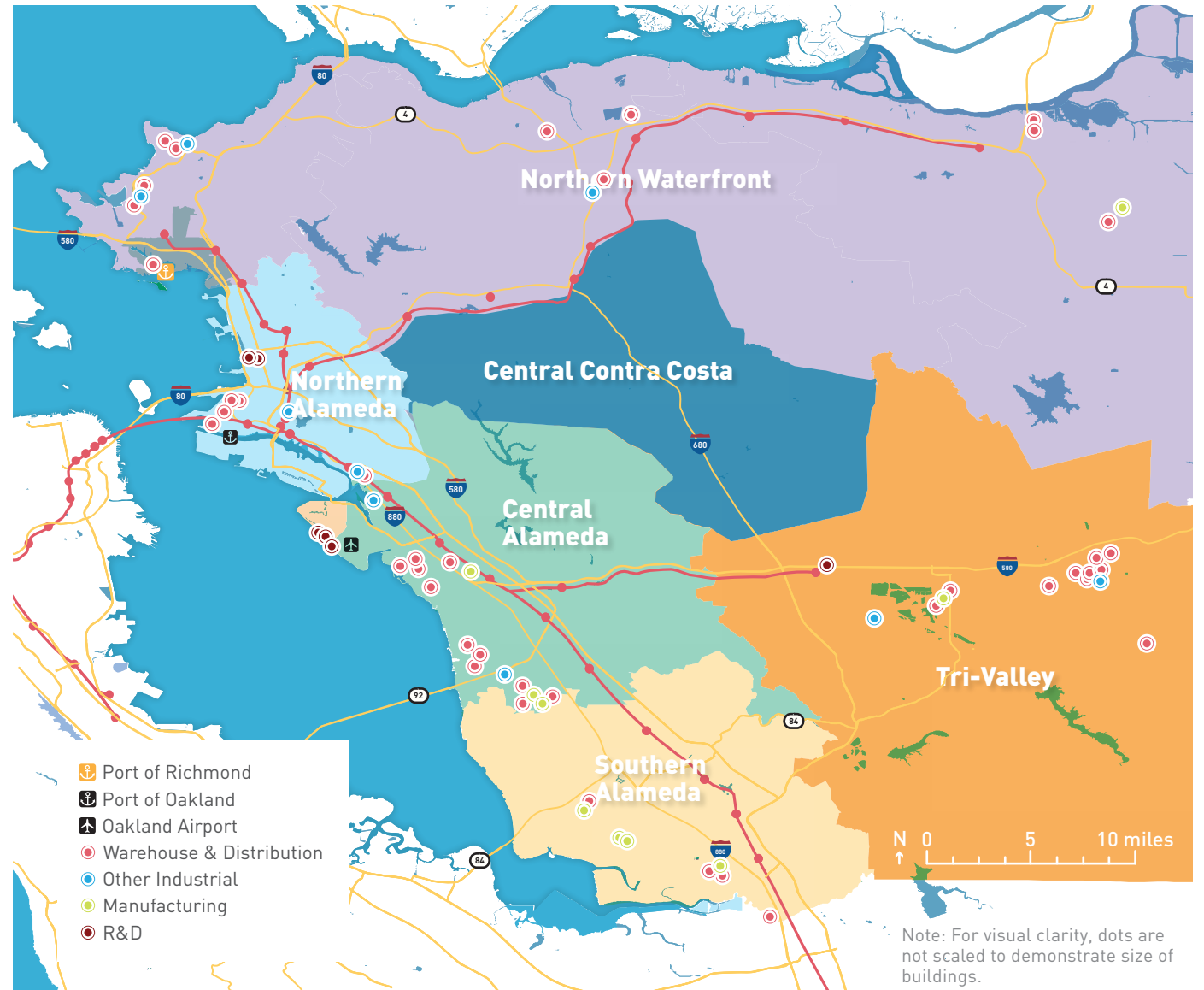
East Bay Flex & Industrial Buildings Built in the Last 5 Years

New Industrial Buildings: Built 2018-2022

- The number of buildings built from 2018-2022 far surpassed those built in 2012-2017 indicating ongoing development interest
- The diversity of building types increased but warehouse & distribution remained dominant
- Based on feedback from developers and brokers, majority of new buildings are not spec development

Building Type	Total Buildings Added	Total Square Feet Added	Average Size of Buildings (sf)
Manufacturing	15	1,798,583	119,906
Other Industrial	10	349,356	34,936
R&D	11	833,206	75,746
Warehouse & Distribution	43	8,517,620	198,084

Note: For additional information on building classifications and definitions, see appendix.
Sources: CoStar 2023; Strategic Economics, 2023.



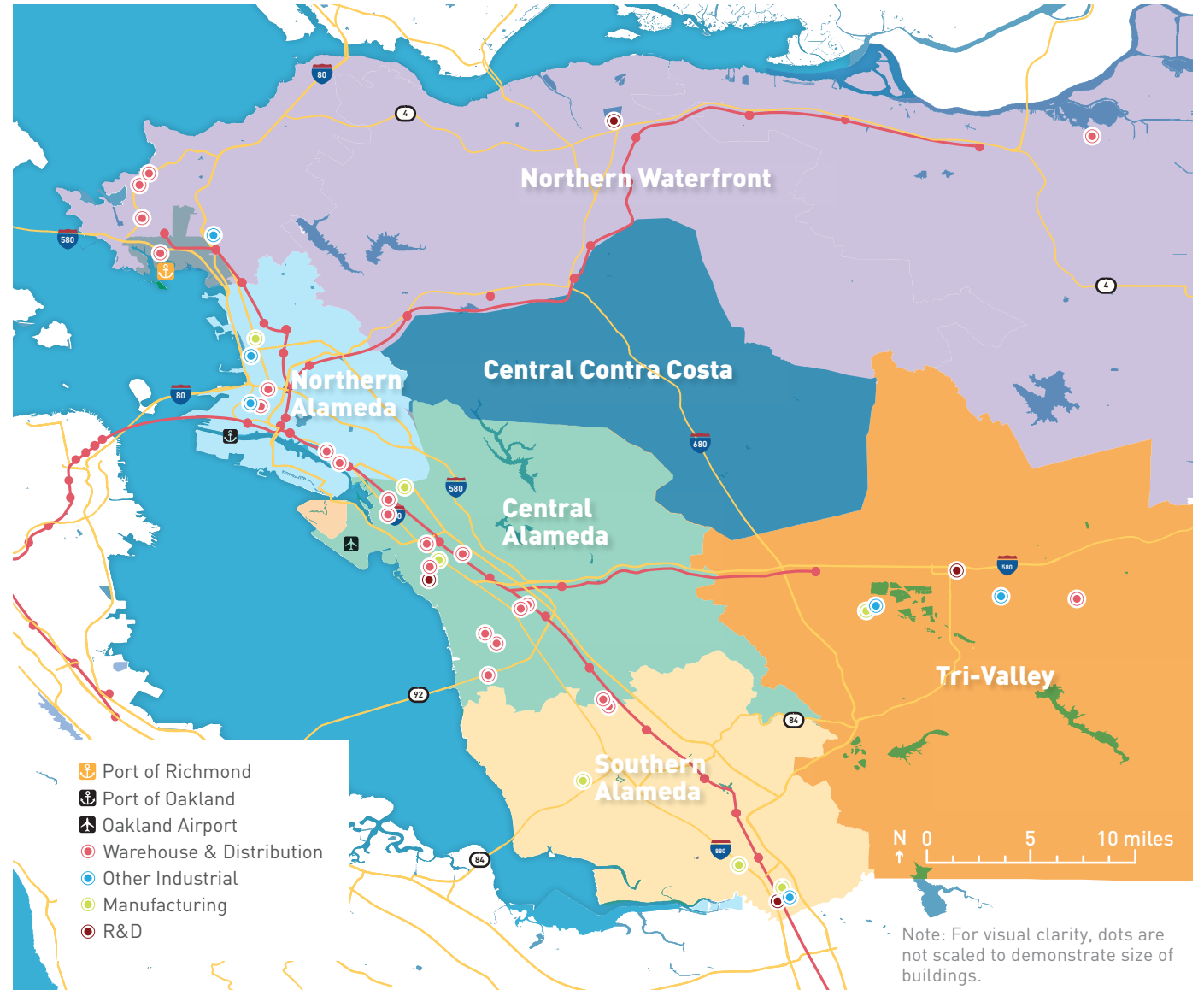
East Bay Flex & Industrial Buildings Renovated from 2012-2017

Renovated Industrial Buildings: 2012-2017

- Renovations were less common than new development from 2012-2017
- Renovations followed similar patterns to new development in location and diversity of building types

Building Type	Total Buildings Added	Total Square Feet Added	Average Size of Buildings (sf)
Manufacturing	8	431,552	53,944
Other Industrial	6	245,718	40,953
R&D	6	406,264	67,711
Warehouse & Distribution	22	1,222,969	55,590

Note: For additional information on building classifications and definitions, see appendix.
Sources: CoStar 2023; Strategic Economics, 2023.



East Bay Flex & Industrial Buildings Renovated in the Last 5 Years

Renovated Industrial Buildings: 2018-2022

- Renovations increased in number from 2018-2022, compared to 2012-2017, and became concentrated in Northern Alameda based on number of buildings
- Renovations, based on square footage, mostly occurred in Southern Alameda, which is likely due to the strong market for industrial spaces, driven by the workforce proximity and bridge access
- Renovations to modernize buildings may be quicker and less expensive than developing new buildings



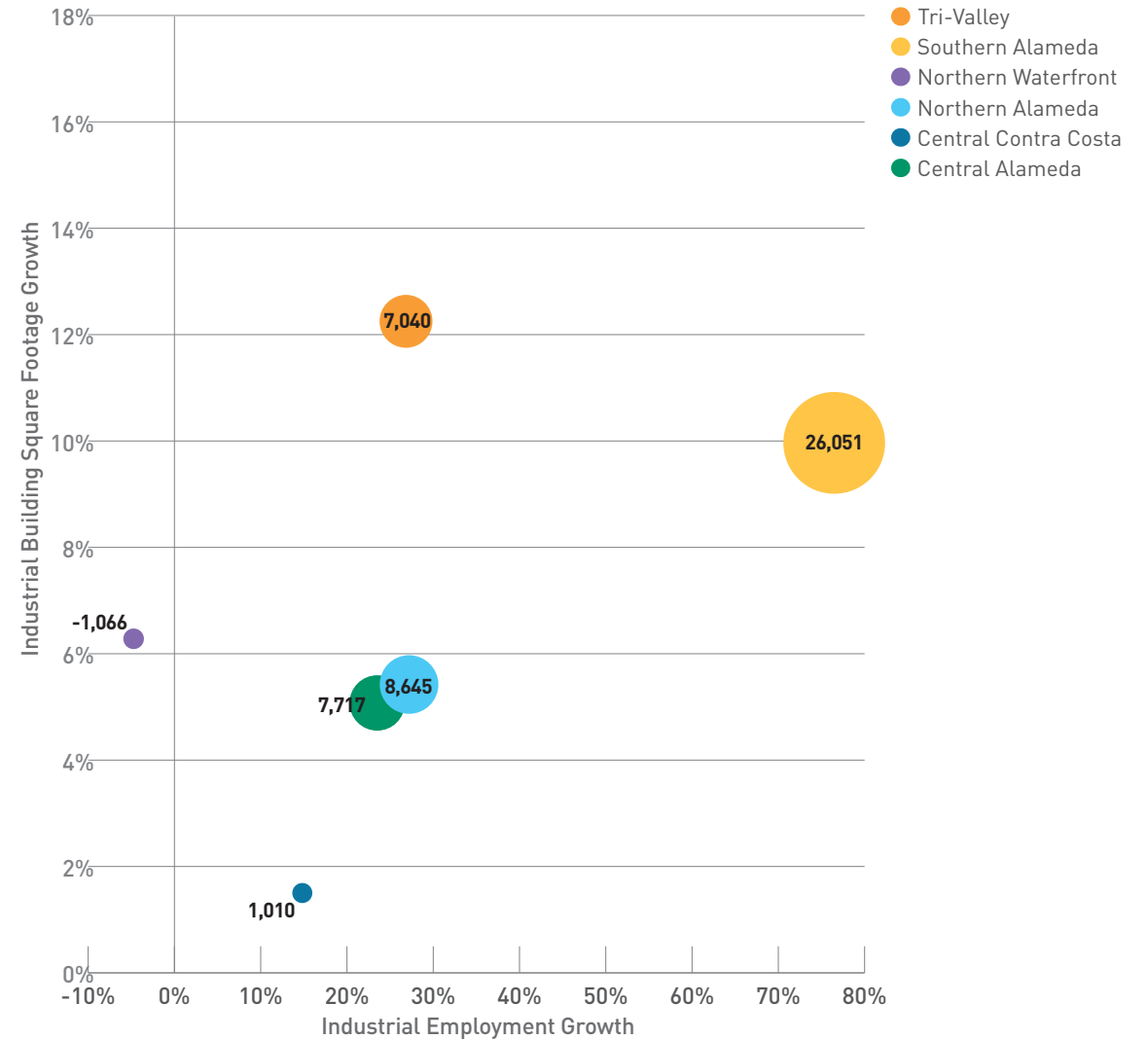
Building Type	Total Buildings Added	Total Square Feet Added	Average Size of Buildings (sf)
Manufacturing	10	370,844	37,084
Other Industrial	10	107,725	10,773
R&D	11	475,542	43,231
Warehouse & Distribution	22	1,222,969	43,687

Note: For additional information on building classifications and definitions, see appendix. Sources: CoStar 2023; Strategic Economics, 2023.

Job Growth Must Be Accommodated In Both New and Existing Spaces

- All subareas have added industrial square footage over the last decade
- Tri-Valley had the largest growth rate in square footage with a net increase of 12% but a job growth rate similar to that of other subareas
- The Northern Waterfront lost industrial jobs, despite adding space, due to major shifts in its industrial economic base primarily the transition from legacy industries such as petroleum refining
- Central and Northern Alameda had similar rates of employment growth and industrial building growth
- Southern Alameda is an outlier from the typical relationship seen in other subareas; this area had exceptional job growth, despite a slower rate of industrial square footage growth than Tri-Valley, but Fremont's active relationship with major employers such as Tesla is what is driving job growth in this region
- Preservation of industrial lands and adapting existing spaces also provided opportunities for industrial job growth regionally
- Other factors besides new development also impact job growth such as job density, automation, industry clusters, and more

Employment Growth and Building Growth (sf) by Subarea 2011-2021

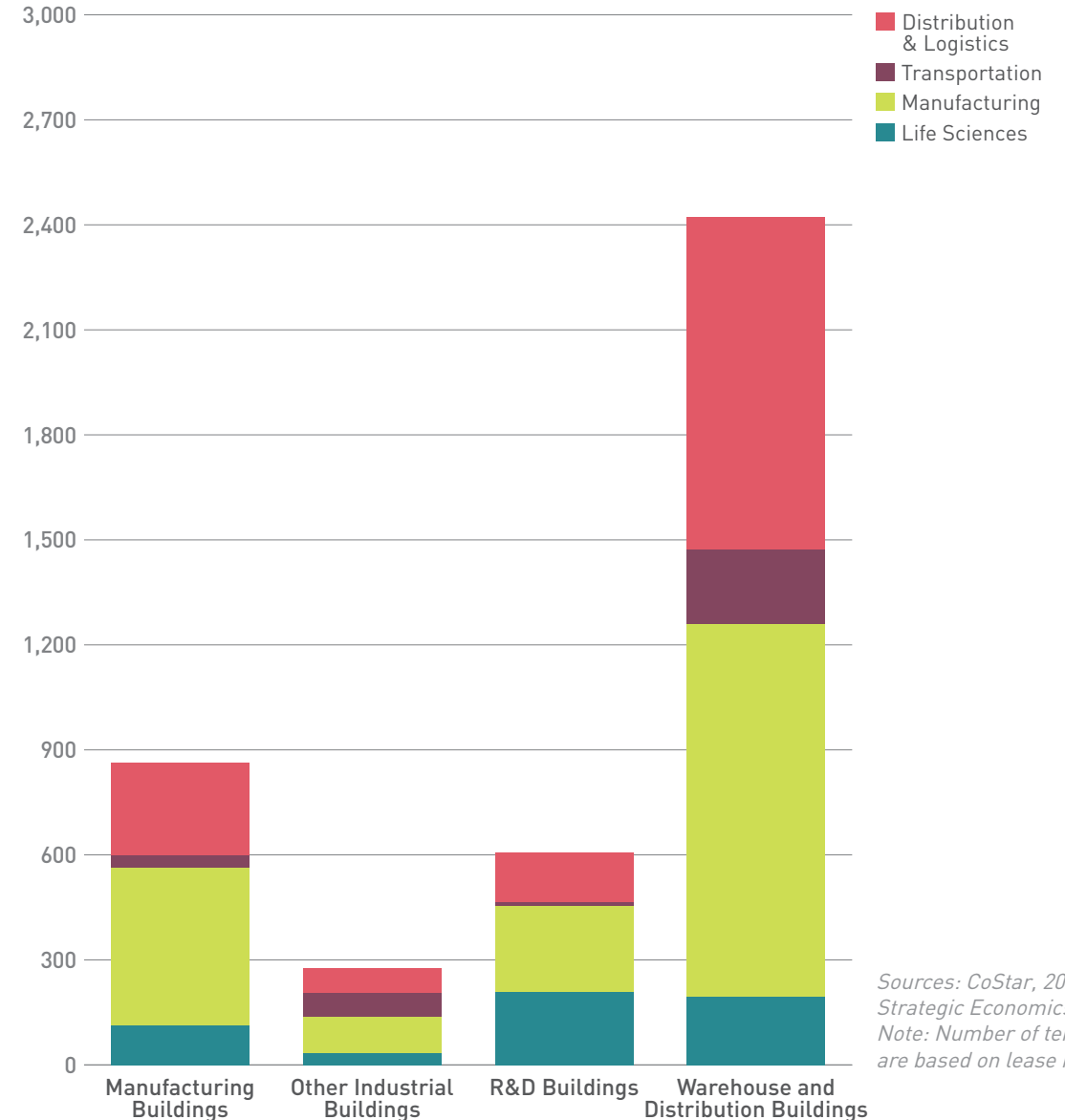


Note: Size of bubble corresponds to numerical job growth.
 Source: Costar, 2023; Lightcast, 2023; Strategic Economics, 2023.

Industrial Users Need a Wide Variety of Spaces

- Industrial developers and brokers are considering the viability of new trends for the East Bay
 - » 20' clear heights spaces
 - » Better building configurations for accommodating flexible and changing uses
- Parcel sizes, city infrastructure, and availability of land impact the types of spaces users can seek
- Business needs, such as access, work force size, job densities, and proximity to suppliers and customers influence what types of spaces businesses seek, and many industrial buildings can accommodate a wide variety of tenants
- Most industrial uses present in the East Bay can be accommodated in flexible building types
- Many tenants are seeking spaces that can accommodate multiple divisions of their businesses, such as R&D and prototyping located on the same campus
- Users change within single buildings over time. A building with a small distributor today may have a biotech research tenant the next year
- For further information and definitions on building types and industry types, see Appendix

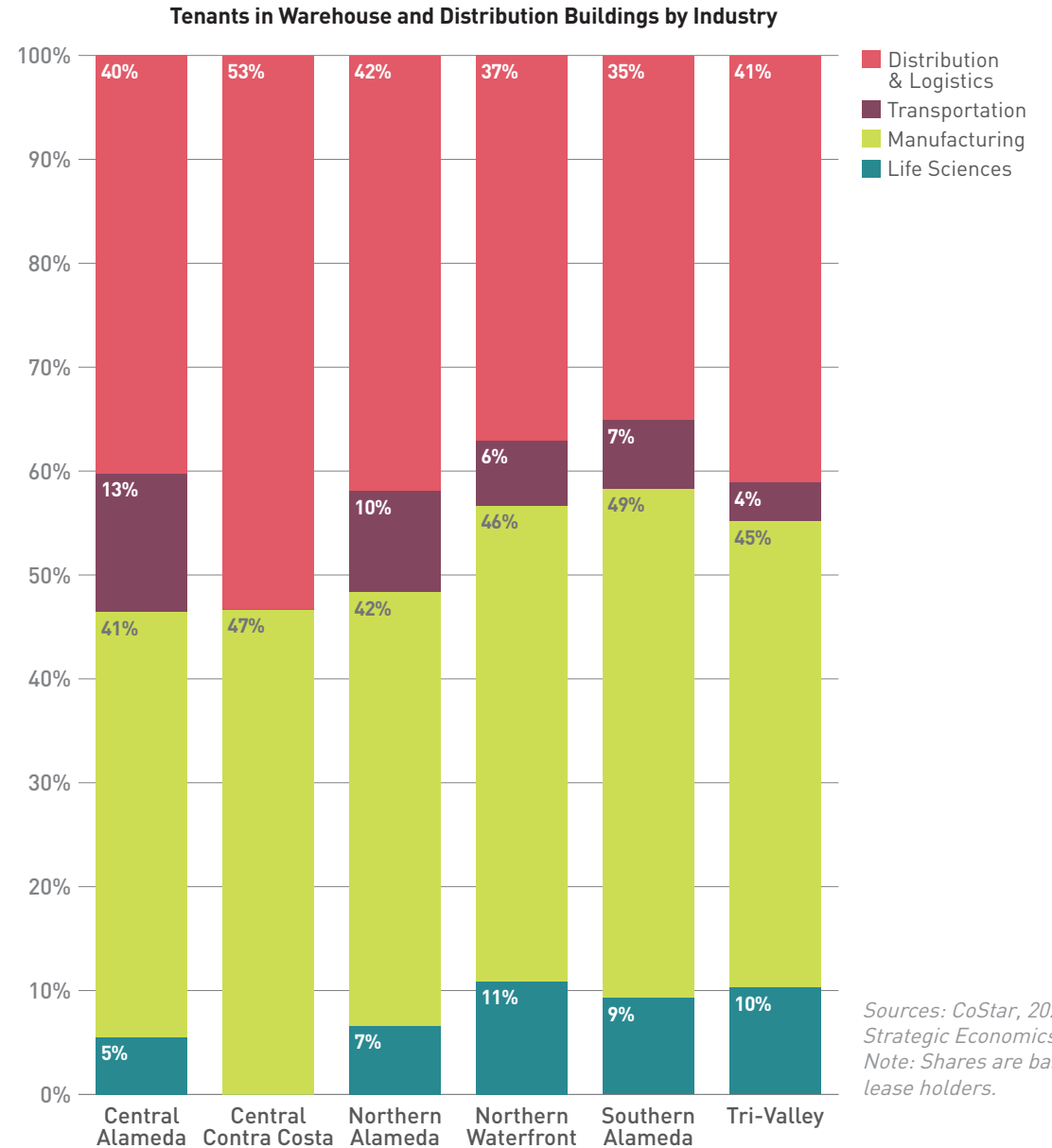
Number of Tenants by Industry in Building Types



Sources: CoStar, 2023; Strategic Economics, 2023. Note: Number of tenants are based on lease holders.

The East Bay Without Warehouse Buildings?

- Most communities are seeking to limit distribution and logistics uses, particularly for e-commerce, by limiting warehouse buildings
- Across the East Bay, a diverse group of businesses and industries are utilizing warehouse and distribution buildings
- Some tenants may be using these buildings for non-distribution uses
- Most life sciences or manufacturing businesses need some warehouse and distribution space to support their operations

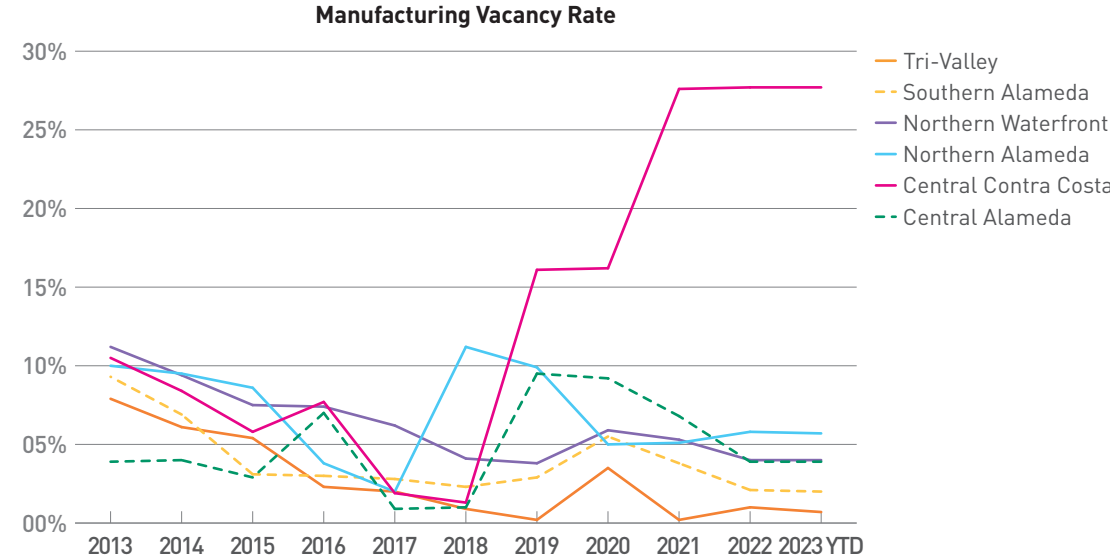
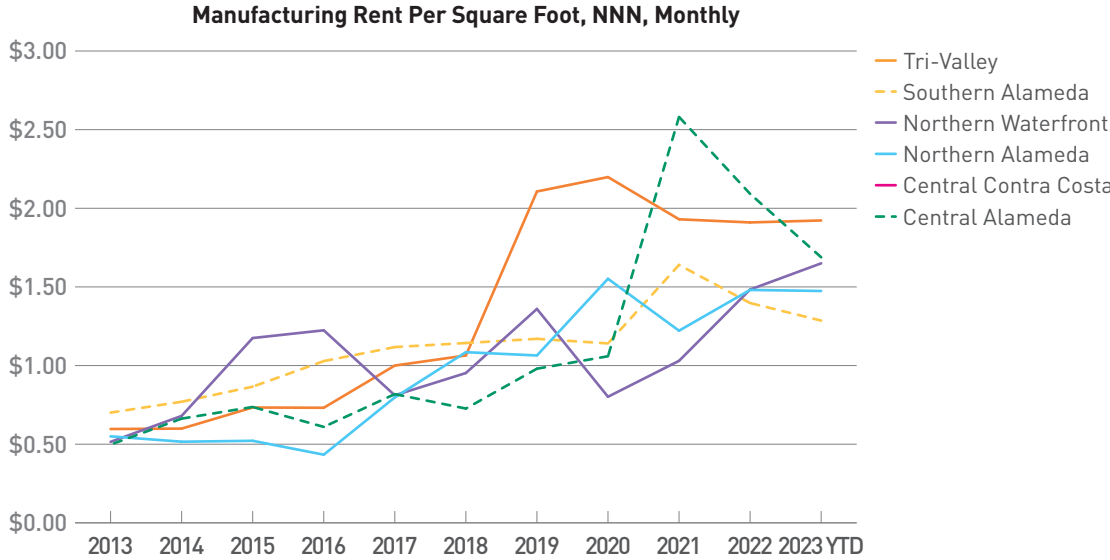
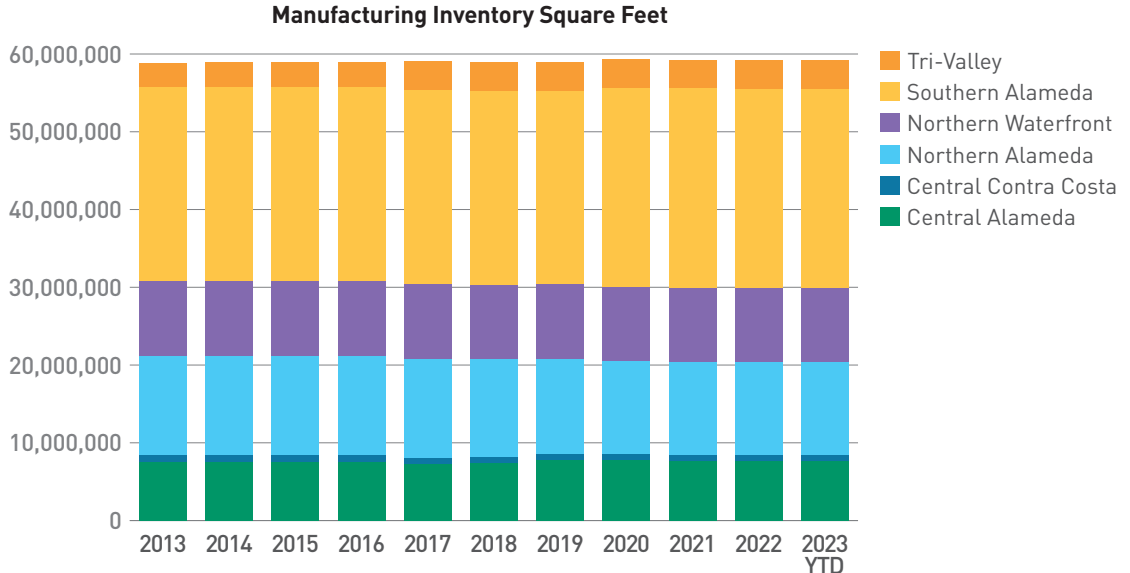


Market Statistics by Building Type

An aerial photograph of a city and industrial area. In the foreground, there are rolling green hills with some trees. The middle ground shows a dense residential area with many houses and trees. In the background, there is a large industrial complex with many buildings, pipes, and smokestacks. A large mountain is visible in the far background under a clear blue sky.

Manufacturing

- Southern Alameda has the largest amount of manufacturing square feet and has added the most square footage over the last 10 years
- Southern Alameda has some specific characteristics that could explain this growth, as discussed above
- Central Contra Costa’s vacancy rates and lack of rent data reflect its small inventory of manufacturing space
- Manufacturing rents and vacancy rates both indicate a competitive market
- Manufacturing continues to grow in the East Bay despite relatively higher costs than most other US markets due to the locational advantages of proximity to the necessary workforce, inputs, and customer base

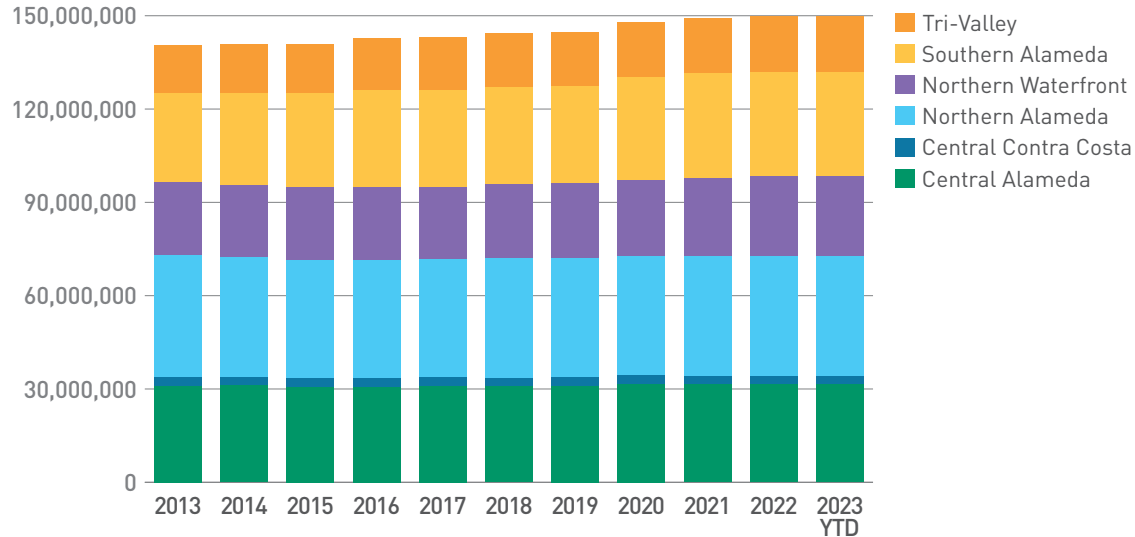


Sources: CoStar, 2023; Strategic Economics, 2023.

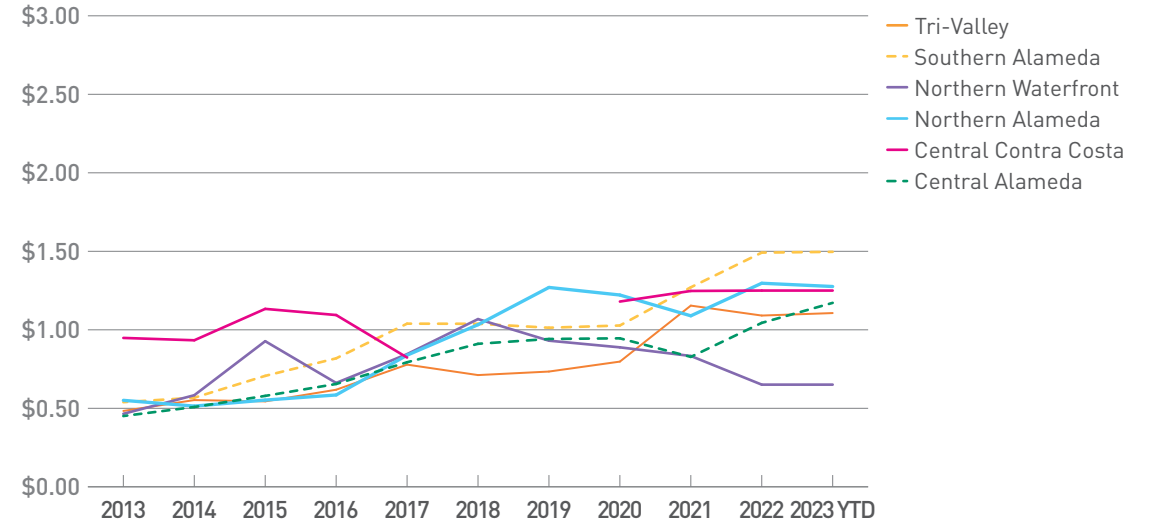
Warehouse & Distribution

- Warehouse and Distribution buildings have the lowest rents of all industrial spaces, but rents have remained mostly competitive across subareas over time
- Vacancy rates for these buildings are consistently low as demand remains high
- Southern Alameda has the largest and fastest growing inventory, but the Northern Waterfront and Tri-Valley are also quickly adding space

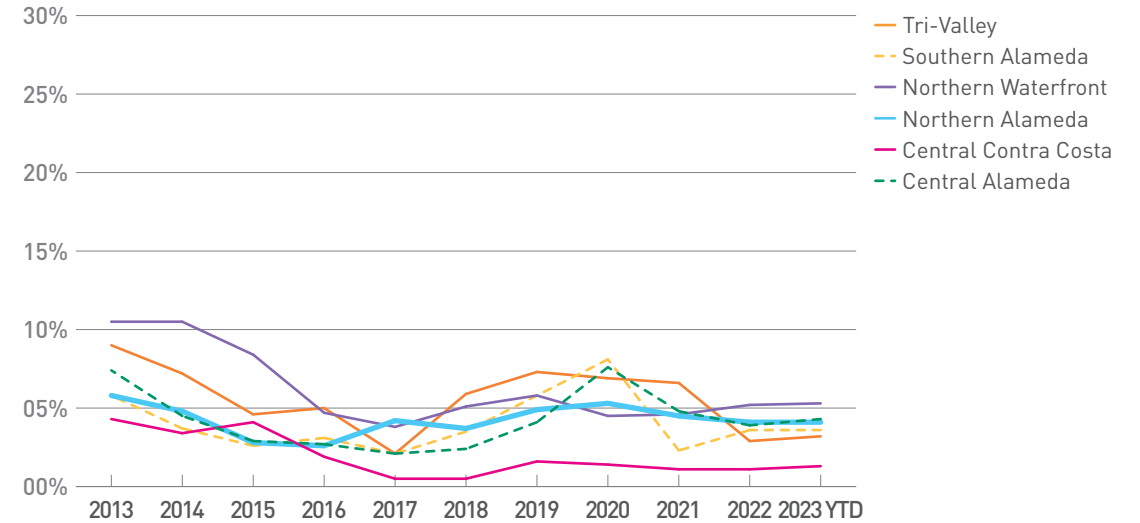
Warehouse & Distribution Inventory Square Feet



Warehouse & Distribution Rent Per Square Foot, NNN, Monthly



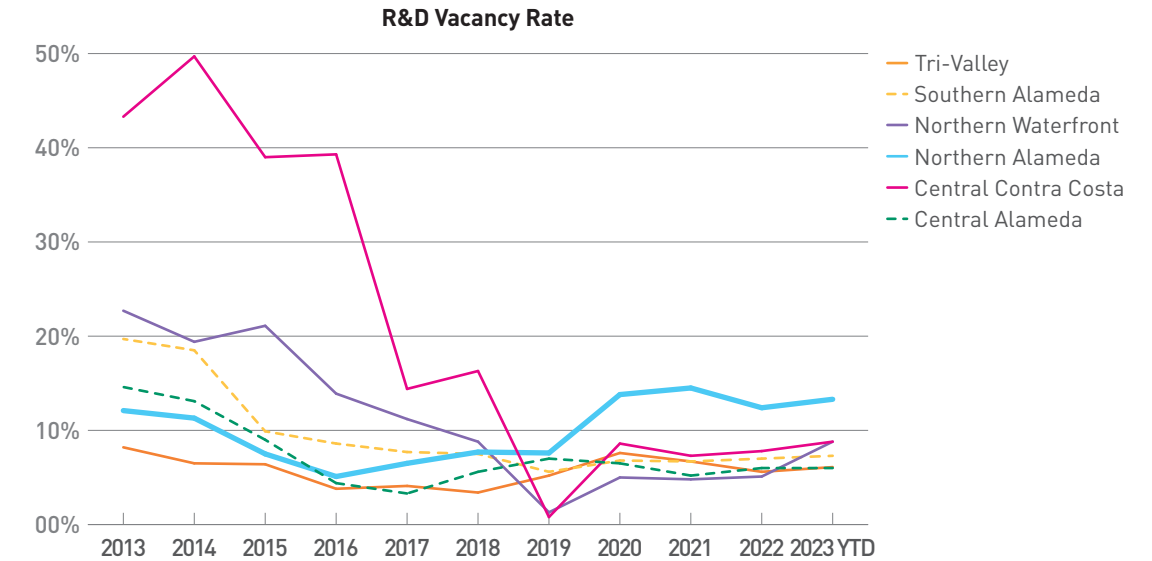
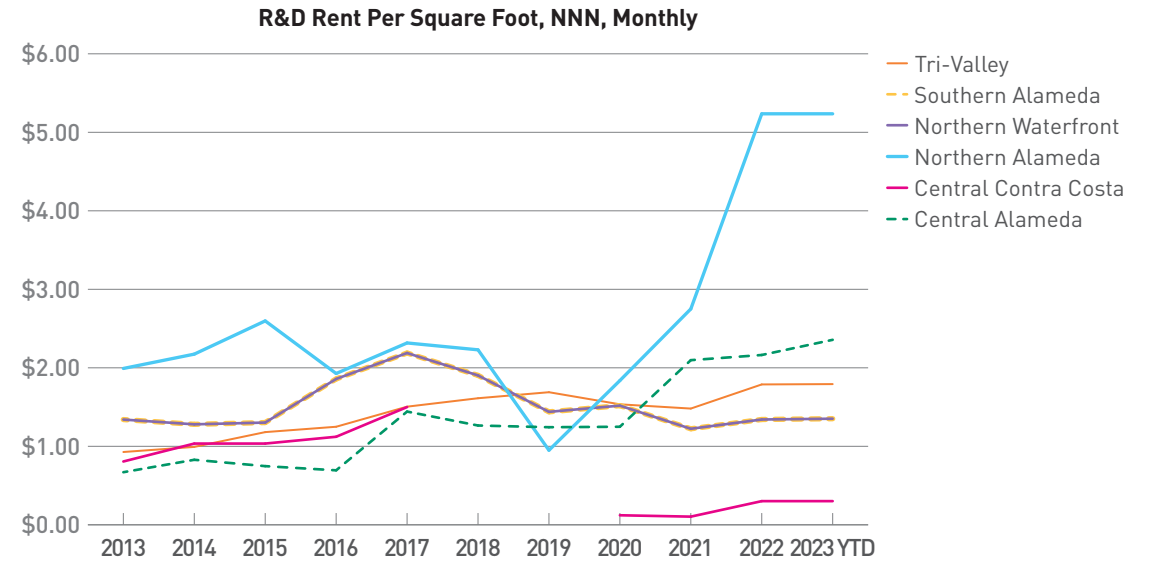
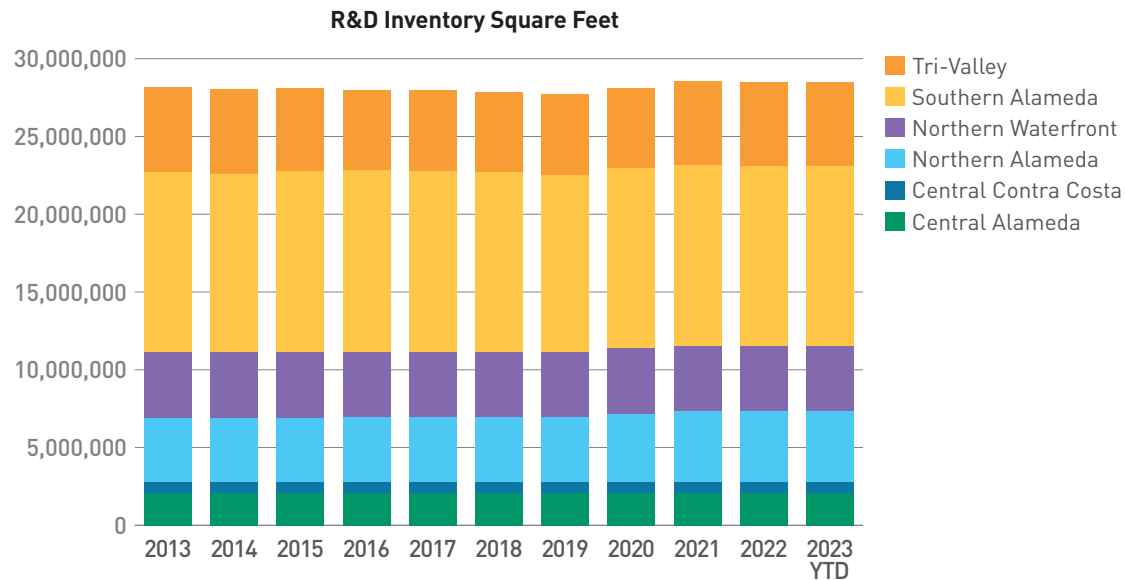
Warehouse & Distribution Vacancy Rate



Sources: CoStar, 2023; Strategic Economics, 2023.

R&D

- Flex and Industrial R&D is a small part of the industrial inventory in the East Bay
- These buildings are characterized by low ceiling heights and versatility, with at least half of the rentable building area used as office and the other half used for research & development uses such as prototyping
- Nearly all growth in the inventory has been in Northern Alameda, but Southern Alameda has the largest inventory
- Rents are much higher for these spaces in most geographies, particularly in Northern Alameda
- Vacancy rates have leveled out for these spaces in the last few years



Sources: CoStar, 2023; Strategic Economics, 2023.

Subarea Profiles



East Bay Regional Strengths and Challenges

Feedback from Stakeholders

Strengths

- Strong industrial reputation
- Streamlined approvals processes
- Phased approvals processes
- Prevention of further industrial conversions by converting retail or office parcels to residential uses instead
- Creation of additional industrial space by converting retail or office to industrial uses
- By-right development of flexible industrial buildings
- Flexible buildings that can accommodate the natural progression of a business or which allow for co-location of business divisions at scale
- Land protection policies
- Planning for green and electrified industrial uses
- Use of financing districts

Challenges

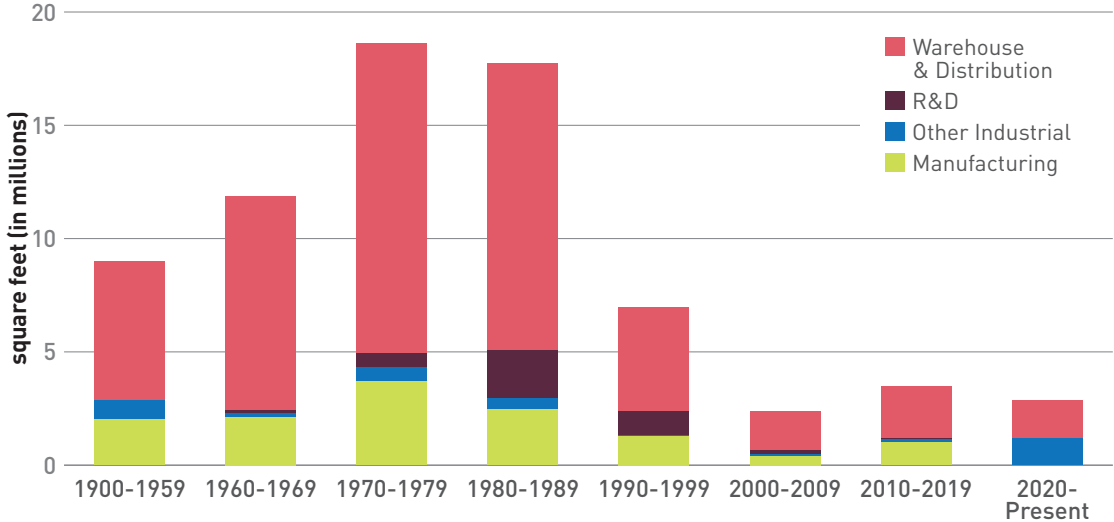
- Lack of certainty for development regarding zoning, permits, and fees
- Power issues
- Limited land availability and land that needs remediation
- Lack of small business financial support to compete for spaces and withstand approvals processes
- Impacts of trucking on local streets and traffic
- Disengaged property owners
- Pressure to convert industrial lands to non-industrial uses

Central Alameda

- Central Alameda has had a net loss of industrial buildings but has gained approximately 630,000 square feet in space
- The majority of added space is in warehouse and distribution type buildings
- Central Alameda added over 7,000 industrial jobs from 2011-2021, the majority of which are in distribution and logistics
- Issues raised by Central Alameda stakeholders include:
 - » Small parcels
 - » Land constrained
 - » Approvals processes
 - » Need to be more climate resilient with sustainable use of power and water
- Central Alameda has many strengths in the industrial ecosystem, including:
 - » Flexible building types
 - » Highway access
 - » Skilled local workforce
 - » Priority Production Area (PPA) designations, which provide regional support for key industrial clusters through policy direction and funding opportunities



Central Alameda Industrial Building Square Feet by Decade Built or Renovated



Sources: CoStar, 2023; Strategic Economics, 2023.

Central Alameda

Central Alameda Industrial Inventory Change

Building Type	NUMBER OF BUILDINGS			SQUARE FEET		
	2013	2023 YTD	Net Change	2013	2023 YTD	% Change
Manufacturing	241	240	-1	7,544,938	7,624,096	1.0%
R&D	61	61	0	2,064,550	2,064,550	0.0%
Other Industrial	46	44	-2	320,746	313,313	-2.3%
Warehouse & Distribution	882	879	-3	30,903,708	31,461,830	1.8%
Total	1,230	1,224	-6	40,883,942	41,463,789	1.5%

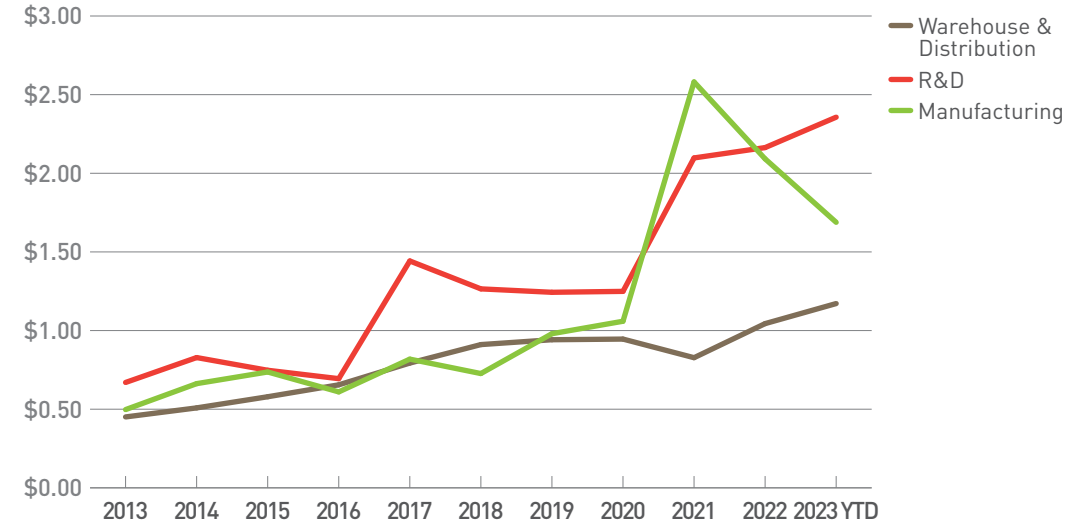
Sources: CoStar, 2023; Strategic Economics, 2023.

Central Alameda Industrial Job Change

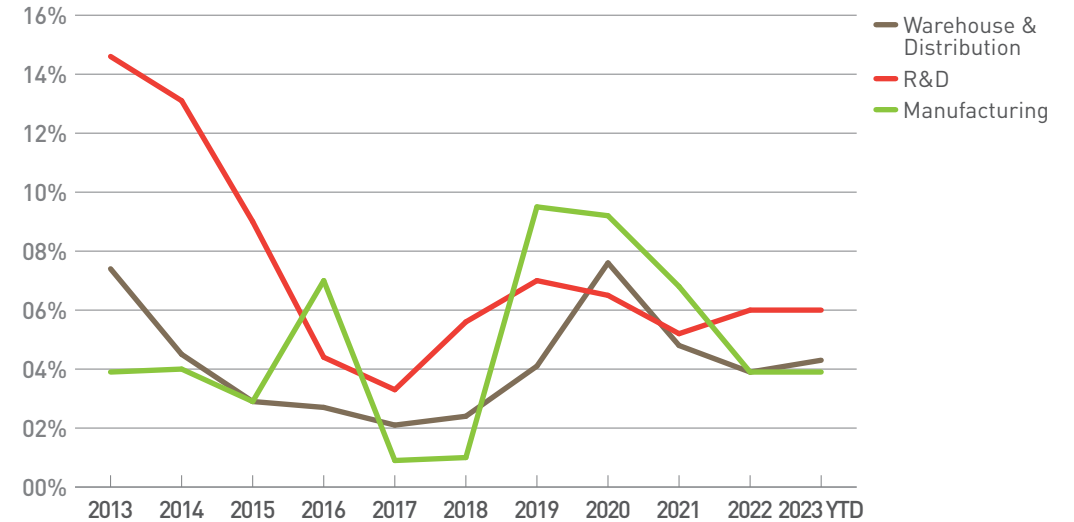
Industry	2011 Jobs	2011 Job Share	2021 Jobs	2021 Job Share	Job Change 2011-2021	Job Share Change 2011-2021
Life Sciences	3,815	12%	4,876	12%	1,061	0%
Manufacturing	15,129	46%	14,440	36%	(689)	-10%
Transportation	2,430	7%	3,118	8%	688	0%
Distribution & Logistics	11,525	35%	18,182	45%	6,657	10%
Total Industrial Jobs	32,899	100%	40,616	100%	7,717	N/A

Note: Job share indicates the percentage of total industrial jobs in the subarea that each industry type comprises.
Sources: Lightcast, 2023; Strategic Economics, 2023.

Central Alameda Industrial Rents Per Square Foot, NNN, Monthly



Central Alameda Industrial Vacancy Rates by Building Type



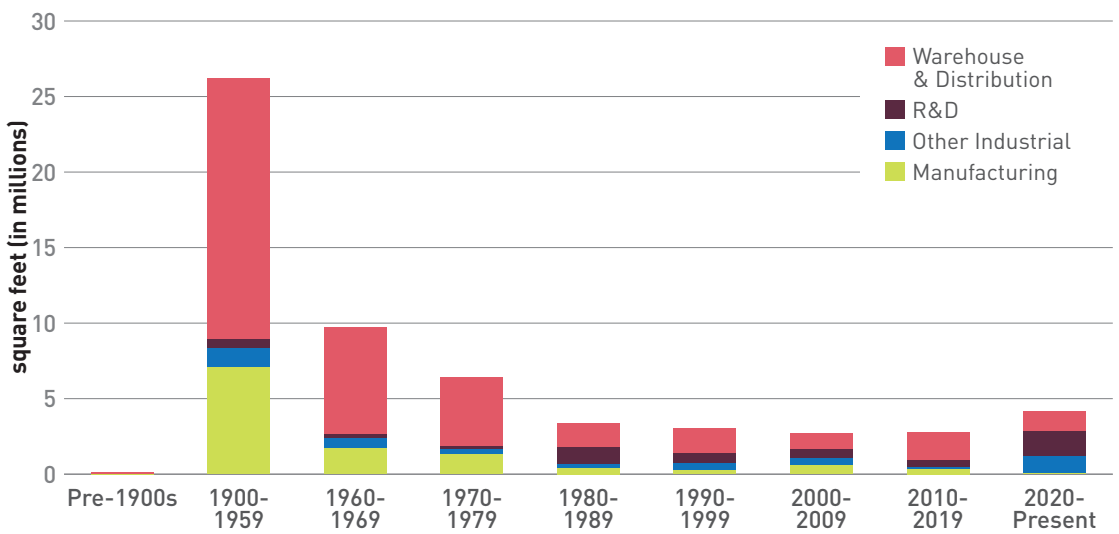
Sources: CoStar, 2023; Strategic Economics, 2023.
Note: Flattened lines indicate insufficient data for that year.

Northern Alameda

- Northern Alameda has had a net loss of industrial buildings and industrial square footage
- Only Flex/Industrial R&D saw a net gain in buildings and square footage, adding approximately 396,000 square feet from 2013-2023
- Northern Alameda added over 8,600 industrial jobs from 2011-2021, the majority of which are in life sciences
- Issues raised by Northern Alameda stakeholders include:
 - » Land constrained
 - » Approvals processes
 - » Conversion pressure
 - » Lack of space for companies to scale up
- Northern Alameda has many strengths in the industrial ecosystem, including:
 - » Early-stage companies
 - » Life sciences reputation
 - » Strong local talent pipeline and university access
 - » Priority Production Area (PPA) designations, which provide regional support for key industrial clusters through policy direction and funding opportunities
 - » Port and highway access



Northern Alameda Industrial Building Square Feet by Decade Built or Renovated



Sources: CoStar, 2023; Strategic Economics, 2023.

Northern Alameda

Northern Alameda Industrial Inventory Change

Building Type	NUMBER OF BUILDINGS			SQUARE FEET		
	2013	2023 YTD	Net Change	2013	2023 YTD	% Change
Manufacturing	430	419	-11	12,753,189	11,901,016	-6.7%
R&D	129	137	8	4,178,517	4,574,710	9.5%
Other Industrial	120	116	-4	1,460,116	1,373,232	-6.0%
Warehouse & Distribution	1,759	1,708	-51	39,418,862	38,364,385	-2.7%
Total	2,438	2,380	-58	57,810,684	56,213,343	-2.8%

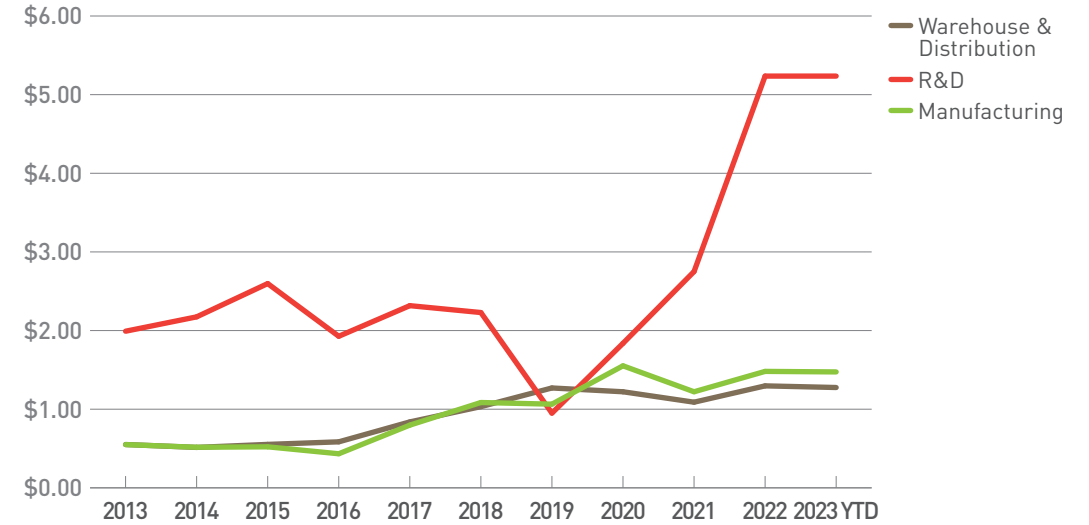
Sources: CoStar, 2023; Strategic Economics, 2023.

Northern Alameda Industrial Job Change

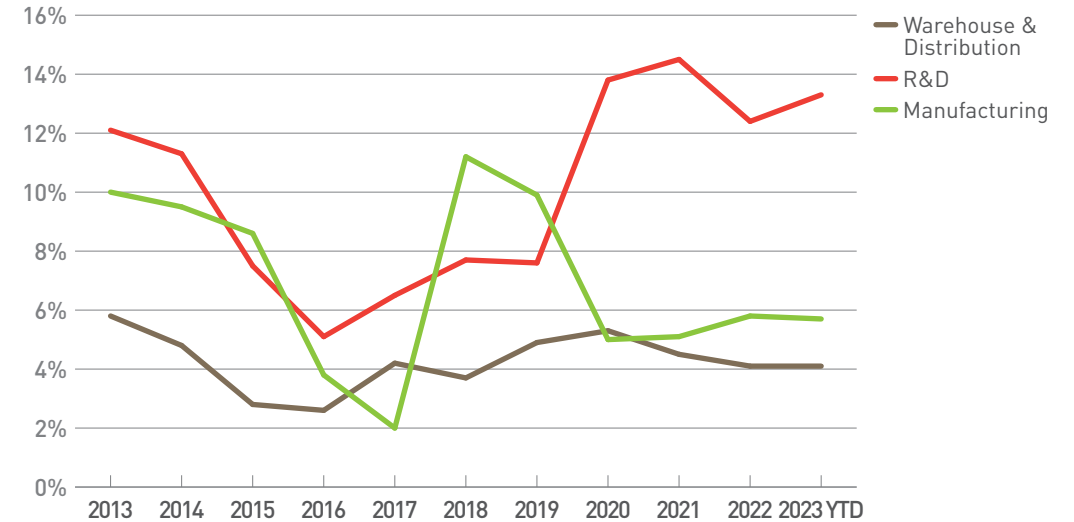
Industry	2011 Jobs	2011 Job Share	2021 Jobs	2021 Job Share	Job Change 2011-2021	Job Share Change 2011-2021
Life Sciences	10,469	33%	15,782	39%	5,313	6%
Manufacturing	10,341	32%	11,610	29%	1,269	-4%
Transportation	2,186	7%	2,544	6%	358	-1%
Distribution & Logistics	8,827	28%	10,532	26%	1,705	-2%
Total Industrial Jobs	31,823	100%	40,468	100%	8,645	N/A

Note: Job share indicates the percentage of total industrial jobs in the subarea that each industry type comprises.
Sources: Lightcast, 2023; Strategic Economics, 2023.

Northern Alameda Industrial Rents Per Square Foot, NNN, Monthly



Northern Alameda Industrial Vacancy Rates by Building Type



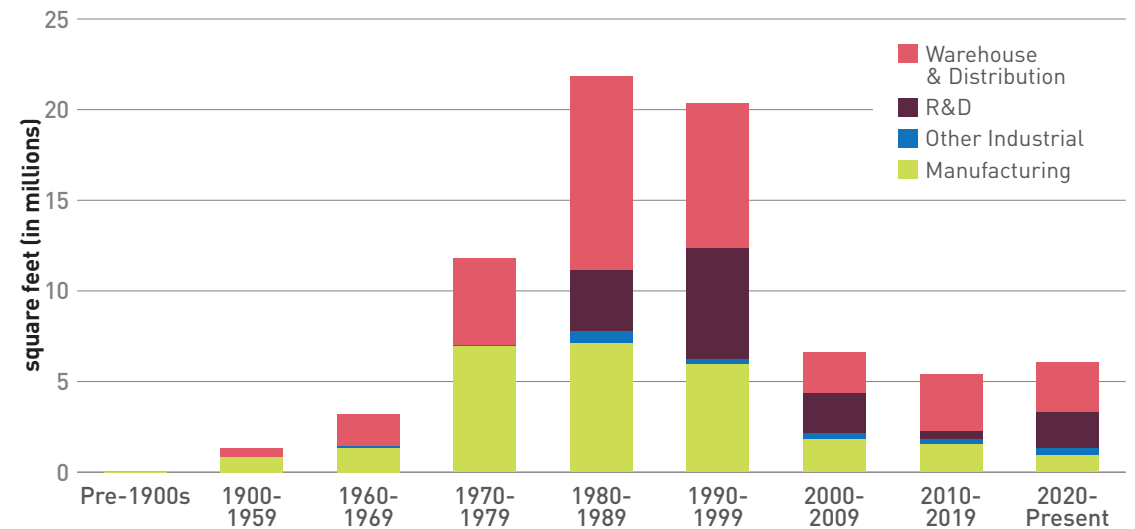
Sources: CoStar, 2023; Strategic Economics, 2023.
Note: Flattened lines indicate insufficient data for that year.

Southern Alameda

- Southern Alameda has had a net gain of industrial buildings and industrial square footage
- The majority of added space is in warehouse and distribution type buildings
- Southern Alameda added over 26,000 industrial jobs from 2011-2021, the majority of which are in manufacturing
- Issues raised by Southern Alameda stakeholders include:
 - » Power and electrification
 - » Smaller buildings and parcels being consolidated, risking a loss of spaces for small businesses
 - » Maintaining industrial affordability
- Southern Alameda has many strengths in the industrial ecosystem, including:
 - » Manufacturing reputation
 - » Bridge and highway access
 - » Easy access to workforce
 - » Reputation for streamlined and predictable approvals processes
 - » Priority Production Area (PPA) designations, which provide regional support for key industrial clusters through policy direction and funding opportunities
 - » Less land-constrained



Southern Alameda Industrial Building Square Feet by Decade Built or Renovated



Sources: CoStar, 2023; Strategic Economics, 2023.

Southern Alameda

Southern Alameda Industrial Inventory Change

Building Type	NUMBER OF BUILDINGS			SQUARE FEET		
	2013	2023 YTD	Net Change	2013	2023 YTD	% Change
Manufacturing	429	428	-1	34,957,340	25,679,464	2.9%
R&D	224	219	-5	11,613,710	11,587,025	-0.2%
Other Industrial	21	20	-1	433,212	427,817	-1.2%
Warehouse & Distribution	652	668	16	28,637,352	33,425,911	16.7%
Total	1,326	1,335	9	65,641,614	71,120,217	8.3%

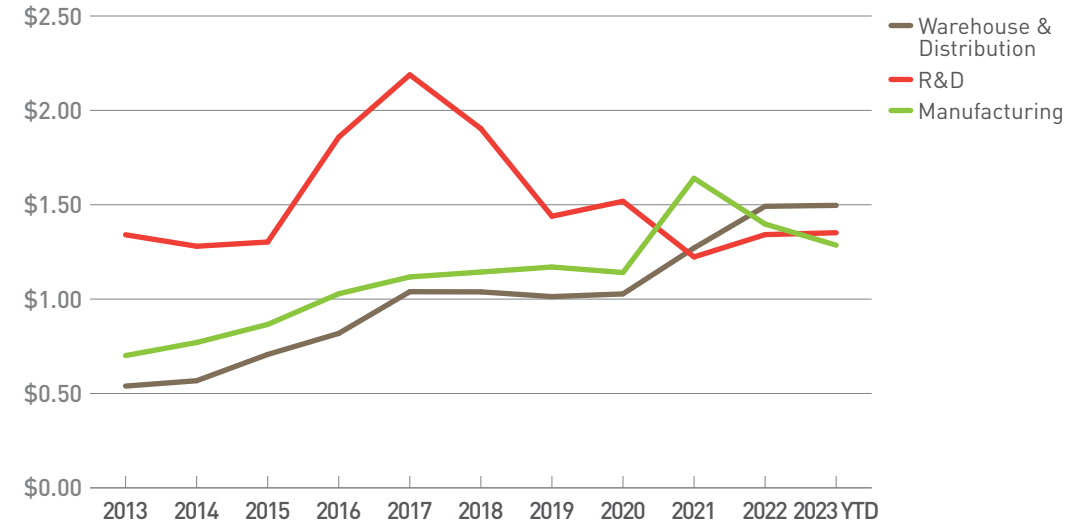
Sources: CoStar, 2023; Strategic Economics, 2023.

Southern Alameda Industrial Job Change

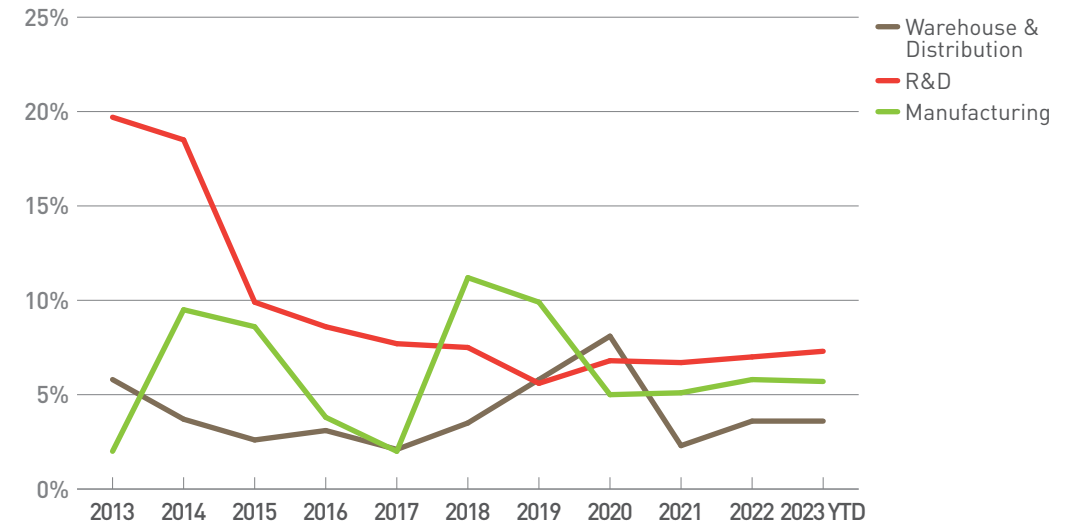
Industry	2011 Jobs	2011 Job Share	2021 Jobs	2021 Job Share	Job Change 2011-2021	Job Share Change 2011-2021
Life Sciences	7,869	23%	11,051	18%	18%	-5%
Manufacturing	17,638	52%	39,808	66%	22,170	14%
Transportation	1,048	3%	1,422	2%	374	-1%
Warehouse & Logistics	7,470	22%	7,795	13%	325	-9%
Total Industrial Jobs	34,025	100%	60,076	100%	26,051	N/A

Note: Job share indicates the percentage of total industrial jobs in the subarea that each industry type comprises.
Sources: Lightcast, 2023; Strategic Economics, 2023.

Southern Alameda Industrial Rents Per Square Foot, NNN, Monthly



Southern Alameda Industrial Vacancy Rates by Building Type



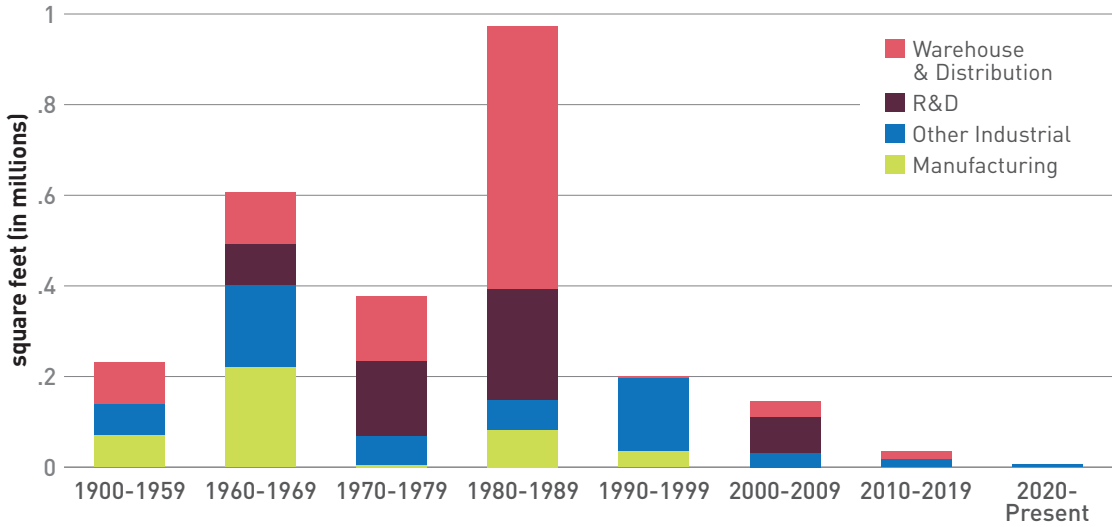
Sources: CoStar, 2023; Strategic Economics, 2023.
Note: Flattened lines indicate insufficient data for that year.

Central Contra Costa

- Central Contra Costa has a very small industrial inventory that has seen little change over time
 - Central Contra Costa’s land is generally deemed more valuable for residential and commercial uses due to its urbanized character
 - Central Contra Costa’s industrial inventory is primarily smaller sites suitable for local serving uses such as auto repair and construction
 - The most likely industrial sectors to grow in Contra Costa County are life sciences and biotechnology uses, but stakeholders indicate that changes to zoning and approvals processes are necessary to make the area competitive for these tenants
- Central Contra Costa added over 1,000 industrial jobs from 2011-2021, the majority of which are in distribution and logistics
 - Central Contra Costa’s primary strength in the industrial ecosystem is its central access



Central Contra Costa Industrial Building Square Feet by Decade Built or Renovated



Sources: CoStar, 2023; Strategic Economics, 2023.

Central Contra Costa

Central Contra Costa Industrial Inventory Change

Building Type	NUMBER OF BUILDINGS			SQUARE FEET		
	2013	2023 YTD	Net Change	2013	2023 YTD	% Change
Manufacturing	33	33	0	776,190	776,190	0.0%
R&D	14	14	0	670,542	670,542	0.0%
Other Industrial	18	18	0	196,900	196,900	0.0%
Warehouse & Distribution	171	171	0	2,710,698	2,710,106	0.0%
Total	236	236	0	4,354,330	4,353,738	0.0%

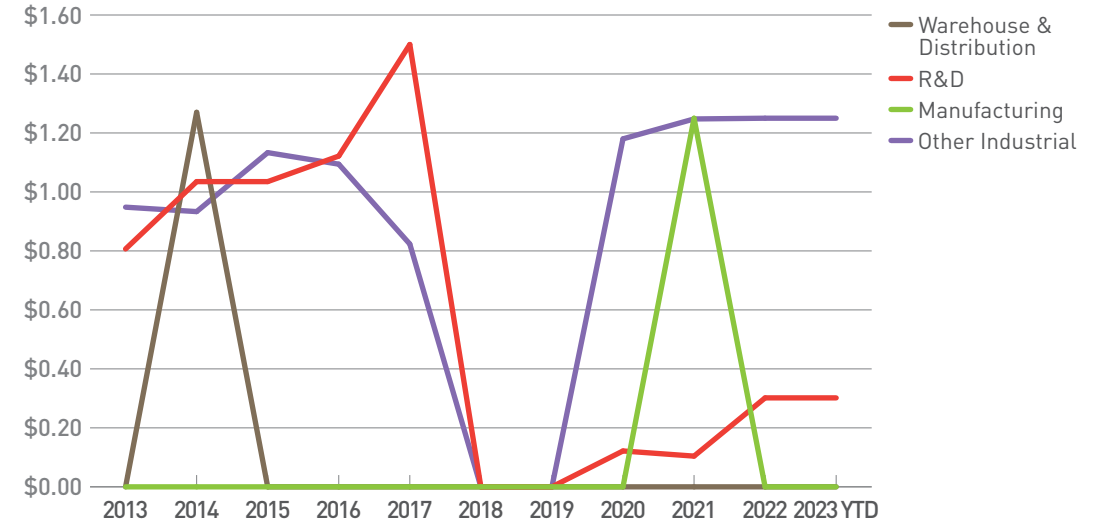
Sources: CoStar, 2023; Strategic Economics, 2023.

Central Contra Costa Industrial Job Change

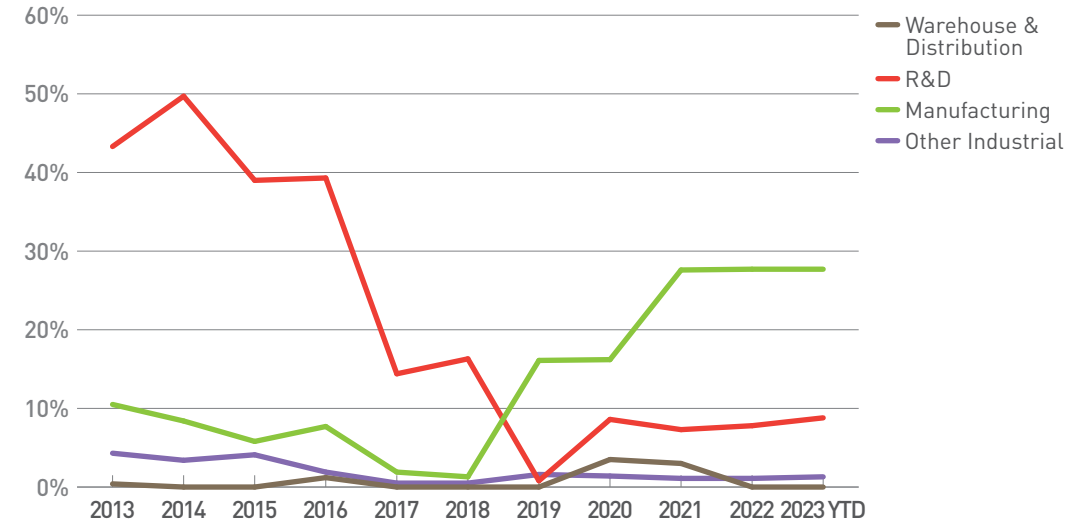
Industry	2011 Jobs	2011 Job Share	2021 Jobs	2021 Job Share	Job Change 2011-2021	Job Share Change 2011-2021
Life Sciences	2,483	36%	2,195	28%	(288)	-8%
Manufacturing	1,741	26%	1,819	23%	78	-2%
Transportation	170	2%	317	4%	147	2%
Distribution & Logistics	2,420	36%	3,493	45%	1,073	9%
Total Industrial Jobs	6,814	100%	7,824	100%	1,010	N/A

Note: Job share indicates the percentage of total industrial jobs in the subarea that each industry type comprises.
Sources: Lightcast, 2023; Strategic Economics, 2023.

Central Contra Costa Industrial Rents Per Square Foot, NNN, Monthly



Central Contra Costa Industrial Vacancy Rates by Building Type



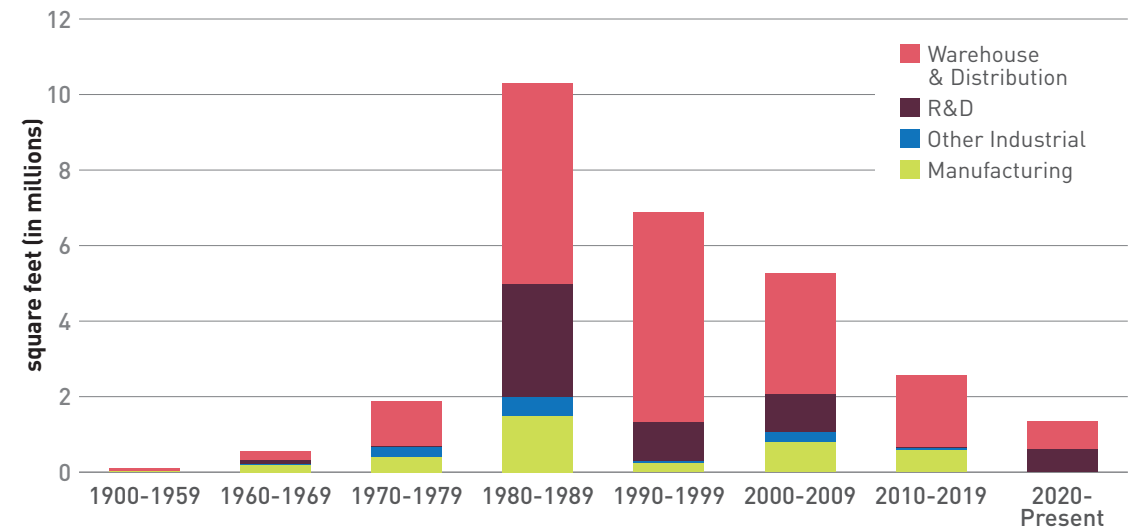
Sources: CoStar, 2023; Strategic Economics, 2023.
Note: Flattened lines indicate insufficient data for that year.

Tri-Valley

- Tri-Valley has had a net gain of industrial buildings and industrial square footage
- The majority of added space is in warehouse and distribution type buildings
- Tri-Valley added over 7,000 industrial jobs from 2011- 2021, the majority of which are in life sciences
- Issues raised by Tri-Valley stakeholders include:
 - » Approvals processes
 - » Conversion pressure
 - » Truck traffic and impacts on local infrastructure
 - » Viability of small businesses
 - » Land constraints
- Tri-Valley has many strengths in the industrial ecosystem, including:
 - » Growing Life Sciences companies
 - » Priority Production Area (PPA) designations, which provide regional support for key industrial clusters through policy direction and funding opportunities
 - » Highway access
 - » Two National Laboratories
 - » Proximity to inland distribution centers and Central Valley’s agricultural exports



Tri-Valley Industrial Building Square Feet by Decade Built or Renovated



Sources: CoStar, 2023; Strategic Economics, 2023.

Tri-Valley

Tri-Valley Industrial Inventory Change

Building Type	NUMBER OF BUILDINGS			SQUARE FEET		
	2013	2023 YTD	Net Change	2013	2023 YTD	% Change
Manufacturing	104	105	1	3,165,605	3,722,161	17.6%
R&D	170	168	-2	5,421,659	5,412,625	-0.2%
Other Industrial	14	14	0	199,683	199,683	0.0%
Warehouse & Distribution	470	482	12	15,605,266	17,948,336	15.0%
Total	758	769	11	24,392,213	27,282,805	11.9%

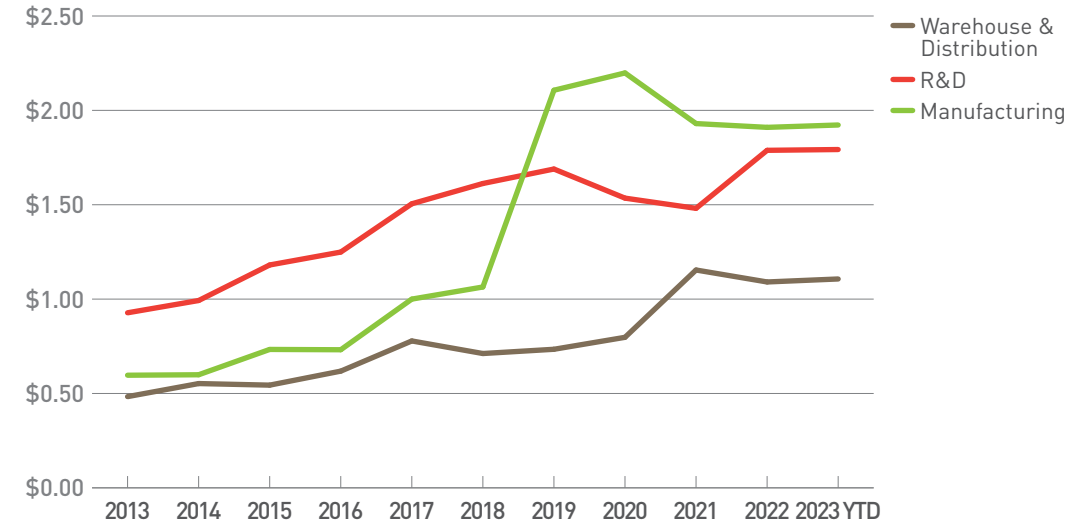
Sources: CoStar, 2023; Strategic Economics, 2023.

Tri-Valley Industrial Job Change

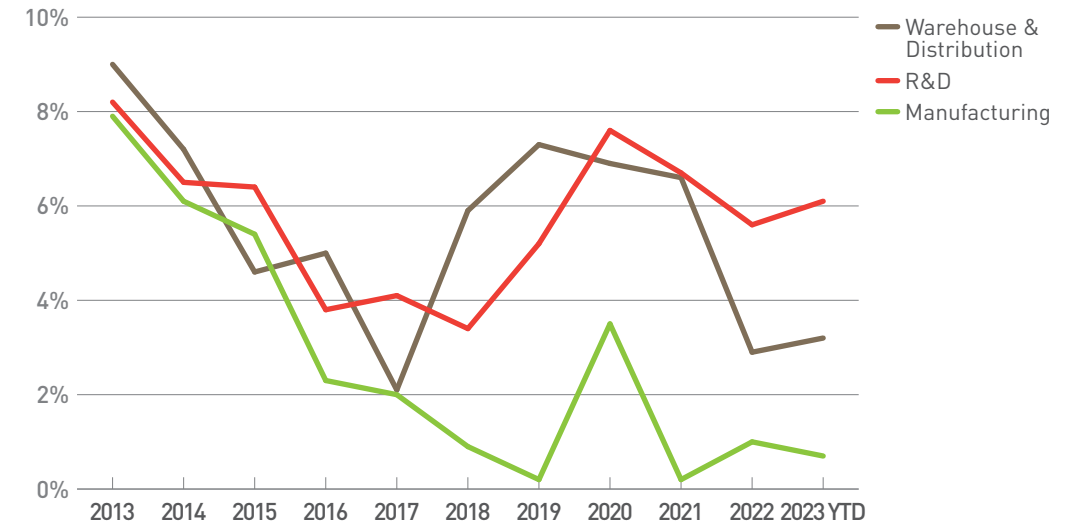
Industry	2011 Jobs	2011 Job Share	2021 Jobs	2021 Job Share	Job Change 2011-2021	Job Share Change 2011-2021
Life Sciences	11,535	44%	15,668	47%	4,133	3%
Manufacturing	7,392	28%	9,558	29%	2,166	1%
Transportation	561	2%	650	2%	89	0%
Distribution & Logistics	6,781	26%	7,433	22%	652	-3%
Total Industrial Jobs	26,269	100%	33,309	100%	7,040	N/A

Note: Job share indicates the percentage of total industrial jobs in the subarea that each industry type comprises.
Sources: Lightcast, 2023; Strategic Economics, 2023.

Tri-Valley Industrial Rents Per Square Foot, NNN, Monthly



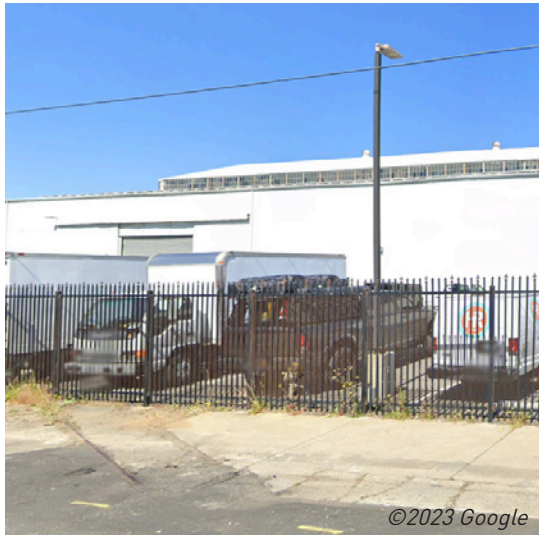
Tri-Valley Vacancy Rates by Building Type



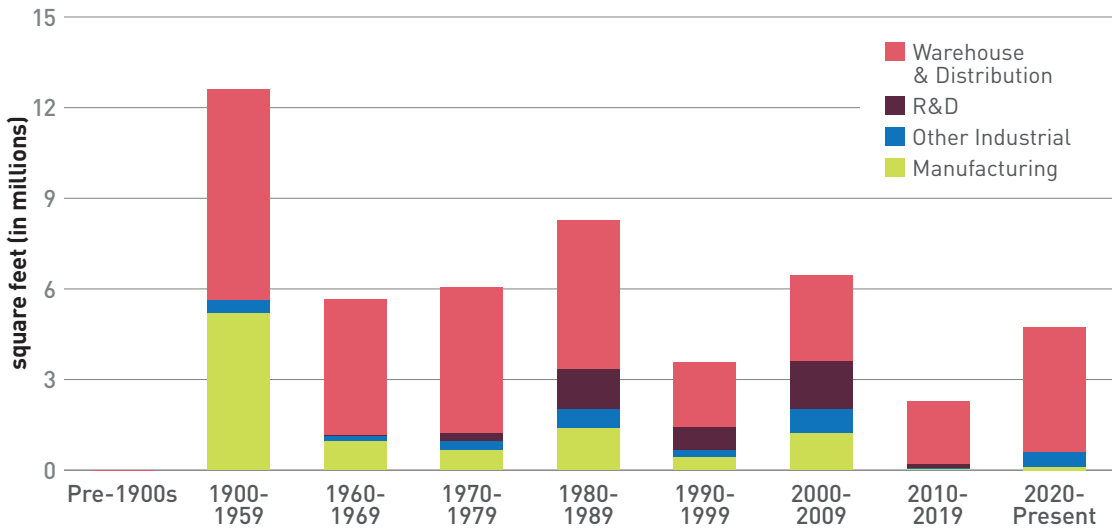
Sources: CoStar, 2023; Strategic Economics, 2023.
Note: Flattened lines indicate insufficient data for that year.

Northern Waterfront

- Northern Waterfront has had a net gain of industrial buildings and industrial square footage
- The majority of added space is in warehouse and distribution type buildings
- Northern Waterfront has many strengths in the industrial ecosystem, including:
 - » Priority Production Area (PPA) designations, which provide regional support for key industrial clusters through policy direction and funding opportunities
 - » Highway access
 - » Housing-rich
 - » Shovel ready land
 - » Business-friendly environment for all types of industrial businesses
 - » Direct water access to Port of Stockton and the Sacramento Delta
- Northern Waterfront lost approximately 1,000 industrial jobs from 2011-2021, the majority of which were in manufacturing
- Northern Waterfront gained jobs in all other industrial sectors, primarily in distribution and logistics
- Issues raised by Northern Waterfront stakeholders include:
 - » Recruitment and marketing
 - » Lack of incentives
 - » Limited available workforce
 - » Business license taxation
 - » Preparing workforce for transition to clean energy
 - » Available spaces do not accommodate all stages of the industrial business life-cycle



Northern Waterfront Industrial Building Square Feet by Decade Built or Renovated



Sources: CoStar, 2023; Strategic Economics, 2023.

Northern Waterfront

Northern Waterfront Industrial Inventory

Building Type	NUMBER OF BUILDINGS			SQUARE FEET		
	2013	2023 YTD	Net Change	2013	2023 YTD	% Change
Manufacturing	182	180	-2	9,651,337	9,547,647	-1.1%
R&D	120	120	0	4,187,554	4,187,554	0.0%
Other Industrial	54	55	1	579,049	580,049	0.2%
Warehouse & Distribution	986	998	12	23,395,554	25,860,527	10.5%
Total	1,342	1,353	11	37,813,494	40,175,777	6.2%

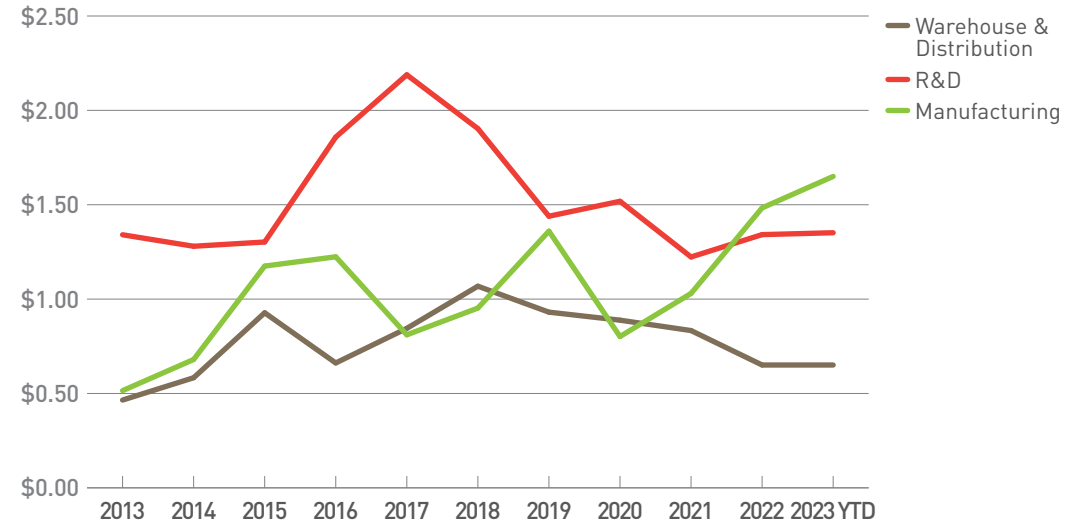
Sources: CoStar, 2023; Strategic Economics, 2023.

Northern Waterfront Industrial Job Change

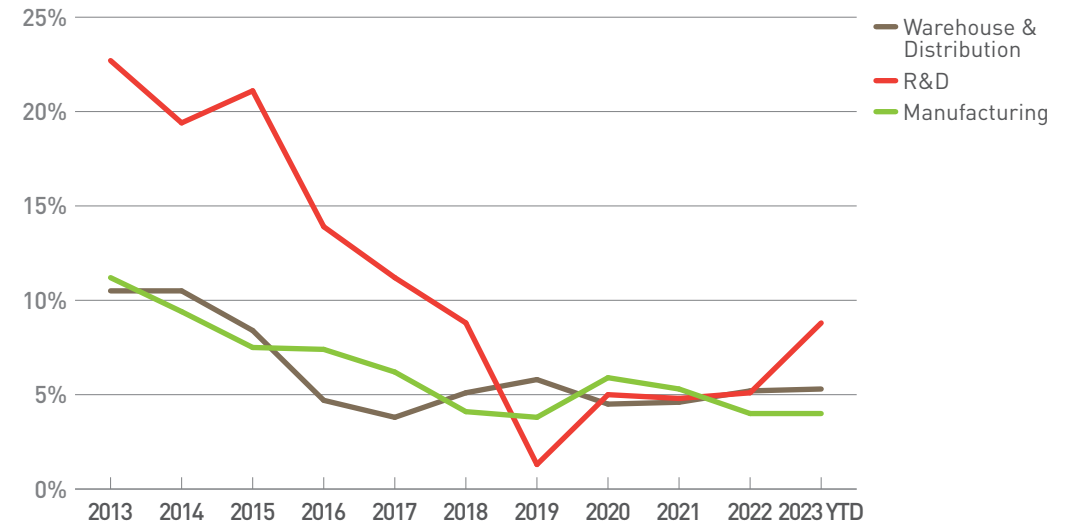
Industry	2011 Jobs	2011 Job Share	2021 Jobs	2021 Job Share	Job Change 2011-2021	Job Share Change 2011-2021
Life Sciences	3,513	16%	3,732	17%	219	2%
Manufacturing	12,715	56%	9,331	43%	(3,384)	-13%
Transportation	666	3%	1,056	5%	390	2%
Distribution & Logistics	5,645	25%	7,354	34%	1,709	9%
Total Industrial Jobs	22,539	100%	21,473	100%	(1,066)	N/A

Note: Job share indicates the percentage of total industrial jobs in the subarea that each industry type comprises.
Sources: Lightcast, 2023; Strategic Economics, 2023.

Northern Waterfront Industrial Rents Per Square Foot, NNN, Monthly



Northern Waterfront Industrial Vacancy Rates by Building Type



Sources: CoStar, 2023; Strategic Economics, 2023.
Note: Flattened lines indicate insufficient data for that year.

Appendix



East Bay Subareas and Cities

Northern Alameda

- Alameda
- Albany
- Berkeley
- Emeryville
- Oakland

Central Alameda

- Ashland
- Castro Valley
- Hayward
- San Leandro
- San Lorenzo

Southern Alameda

- Union City
- Newark
- Fremont

Tri-Valley

- Dublin
- Livermore
- Pleasanton
- Sunol

Central Contra Costa

- Danville
- Lafayette
- Moraga
- Orinda
- San Ramon
- Walnut Creek

Northern Waterfront

- Antioch
- Bay Point
- Bethel Island
- Brentwood Byron
- Clayton
- Concord
- Crockett
- Discovery Bay
- El Cerrito
- El Sobrante
- Hercules
- Martinez
- Oakley
- Pacheco
- Pinole
- Pittsburg
- Pleasant Hill
- Port Costa
- Richmond
- Rodeo
- San Pablo

CoStar Building Type Classification

- Strategic Economics reclassified CoStar properties using the following binning method in order to better match broker reports and building form considerations
- For more information on CoStar’s classifications, see the [CoStar Glossary, www.costar.com/about/costar-glossary](http://www.costar.com/about/costar-glossary)

Strategic Economics Building Classification	CoStar Primary PropertyTypes	CoStar Secondary Property Types
Warehouse & Distribution	<ul style="list-style-type: none"> • Industrial • Flex 	<ul style="list-style-type: none"> • Warehouse • Distribution • Light Distribution • Refrigeration and Cold Storage • TruckTerminal
Manufacturing	<ul style="list-style-type: none"> • Industrial • Flex 	<ul style="list-style-type: none"> • Manufacturing • Light Manufacturing • Food Processing
R&D	<ul style="list-style-type: none"> • Flex 	<ul style="list-style-type: none"> • R&D
Other Industrial	<ul style="list-style-type: none"> • Industrial • Flex 	<ul style="list-style-type: none"> • Showroom • Service • TelecomHotel and Data Hosting • Freestanding • Other

CoStar Building Status Definitions

- Strategic Economics utilized CoStar’s building status definitions to determine change in industrial inventory

Building Status	Definition
Abandoned	Project has been terminated or building is obsolete and unusable
Converted	Building has changed to a new property type
Demolished	Building has been destroyed
Existing	Building is complete and a certificate of occupancy has been received
Final Planning	Project will begin construction in the next 12 months and building permits have typically been issued
Proposed	A building has been announced but is not expected to begin construction within the next 12 months and building permits have likely not been issued
Under Construction	Construction has started and no certificate of occupancy has been received
Under Renovation	Building is unoccupied and renovations are underway; renovations make the space “new” and do not include minor or partial rehabilitations

NAICS Codes Used For Industry Analysis

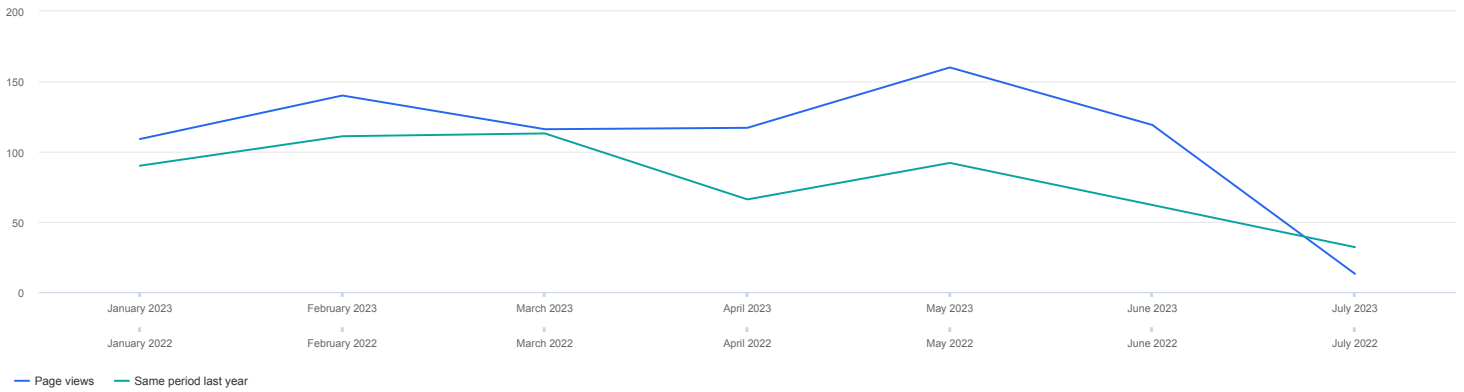
Industry Category	NAICS Codes and Definitions
Life Sciences	<ul style="list-style-type: none"> • 3254-Pharmaceutical and Medicine Manufacturing • 3345-Navigational, Measuring, Electromedical, and Control Instruments Manufacturing • 3391-Medical Equipment and Supplies Manufacturing • 4234-Professional and Commercial Equipment and Supplies Merchant Wholesalers • 4242-Drugs and Druggists' Sundries Merchant Wholesalers • 4246-Chemical and Allied Products Merchant Wholesalers • 5417-Scientific Research and Development Services • 6215-Medical and Diagnostic Laboratories
Transportation	<ul style="list-style-type: none"> • 4841-General Freight Trucking • 4842-Specialized Freight trucking • 4885-Freight Transportation Arrangement • 4889-Other Support Activities for Transportation
Distribution & Logistics	<ul style="list-style-type: none"> • All 4-Digit Codes under NAICS 42 and 49, less those included in life sciences
Manufacturing	<ul style="list-style-type: none"> • All 4-Digit Codes under NAICS 31-33, less those included in life sciences

Page
Northern Waterfront Economic Development Initiative | Contra Costa County, CA Official Website
<https://www.contracosta.ca.gov/4437/Northern-Waterfront-Economic-Development>
Period
2023

Page Overview

Historical overview and comparison

Visits 630 +173 ⓘ	Page views 774 +208 ⓘ	Unique visitors 464 +103 ⓘ	Returning visitors 75 +2 ⓘ	Bounce rate 68.63% +11.31 ⓘ
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[Annotations](#)

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 United States

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Operating system
Windows 10

Browser
Chrome 109.0

Resolution
1920 1080