



CONTRA COSTA COUNTY

AGENDA

Economic Development Committee

Supervisor Candace Andersen, Chair
Supervisor Diane Burgis, Vice Chair

Monday, February 2, 2026	11:00 AM	3361 Walnut Boulevard, Suite 140, Brentwood, CA 94513 309 Diablo Road, Danville, CA 94526
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ZOOM LINK

<https://cccouny-us.zoom.us/j/89875264386>

Join via audio: 1 855-758-1310 US Toll Free Webinar ID: 898 7526 4386

The public may attend this meeting in person at either above location. The public may also attend this meeting remotely via Zoom or call-in.

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

1. Introductions
2. Public comment on any item under the jurisdiction of the Committee and not on this agenda (speakers may be limited to two (2) minutes).
3. REVIEW and APPROVE meeting record of December 1, 2025 [26-360](#)
Attachments: [DRAFT Economic Development Committee Record 12.1.25](#)
4. RECEIVE the Contra Costa Employment Trends Report for Q42025 [26-361](#)
Attachments: [2025Q4 Contra Costa County Employment Trends](#)
5. RECEIVE Report From and/or Provide Direction to Staff Regarding County Economic Development Work Program [26-362](#)
Attachments: [BluDot Business Community Emails](#)
[Industrial Lands Economic Insights 010226](#)
[Industrial Lands Land Use Context 010226](#)
6. The next meeting is currently scheduled for April 6, 2026 at 11:00 a.m.
7. Adjourn

General Information

This meeting provides reasonable accommodations for persons with disabilities planning to attend a the 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 Committee less than 96 hours prior to that meeting are available for public inspection at 1025 Escobar St., 4th Floor, Martinez, during normal business hours. Staff reports related to items on the agenda are also accessible on line at www.co.contra-costa.ca.us.

HOW TO PROVIDE PUBLIC COMMENT:

Persons who wish to address the Committee during public comment on matters within the jurisdiction of the Committee that are not on the agenda, or who wish to comment with respect to an item on the agenda, may comment in person, via Zoom, or via call-in. Those participating in person should offer comments when invited by the Committee Chair. Those participating via Zoom should indicate they wish to speak by using the “raise your hand” feature in the Zoom app. Those calling in should indicate they wish to speak by pushing *9 on their phones.

Public comments generally will be limited to two (2) minutes per speaker. In the interest of facilitating the business of the Board Committee, the total amount of time that a member of the public may use in addressing the Board Committee on all agenda items is 10 minutes. Your patience is appreciated.

Public comments may also be submitted to Committee staff before the meeting by email or by voicemail. Comments submitted by email or voicemail will be included in the record of the meeting but will not be read or played aloud during the meeting.

For Additional Information Contact:

Alyson (Greenlee) Escarzaga, Economic Development Manager, Alyson.Greenlee@dcd.cccounty.us, 925-655-2783



CONTRA COSTA COUNTY

1025 ESCOBAR STREET
MARTINEZ, CA 94553

Staff Report

File #: 26-360

Agenda Date: 2/2/2026

Agenda #: 3.

Advisory Board: Economic Development Committee

Subject: Meeting Record of December 1, 2025

Presenter: Staff

Contact: Alyson Escarzaga (Greenlee) Economic Development Manager 925-655-2783

Information:

This is a recurring item of this committee.

Referral History and Update:

See attachment.

Recommendation(s)/Next Step(s):

REVIEW and APPROVE meeting record from December 1, 2025.

CONTRA COSTA COUNTY ECONOMIC DEVELOPMENT COMMITTEE– Meeting Record

December 1, 2025 10:30 A.M. In Person/Via Zoom

Supervisor Candace Andersen, District II

Supervisor Diane Burgis, District III

1. Welcome and Introductions

Supervisor Andersen called the meeting to order at 10:30 AM. Supervisors Andersen and Burgis introduced themselves.

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

No public comments.

3. REVIEW and APPROVE meeting record of October 6, 2025, Contra Costa County Economic Development Committee

Sup. Burgis approved of the meeting minutes, as did Sup. Andersen. Will pass on to the BOS.

4. DIRECT Staff to Convene a Series of Contra Costa Business Collaborative Series of Business Roundtables in 2026

Project Manager George Carter presented on conducting business roundtables in 2026. These roundtables were led by Mr. Carter in the past when he named it BESTeam: Business, Enhancement, Support, Team Efforts. The purpose is to engage businesses that may lack accessibility to resource partners. DCD Economic Development would host one event per district starting with districts 2 and 3. The City of Antioch's ABC Collaborative is being used as a recent model of how the County can create a successful series. Collaborations with local business professionals to provide resource assistance will be established with assistance from the City of Antioch.

The Economic Development team will capture metrics such as attendance, how many businesses meet with the business resource, providers, and outcomes from those meetings.

The Committee directed staff to pursue convening the Contra Costa County Business Collaborative Series.

5. RECEIVE Presentation on Findings from the Unincorporated Spring Business Survey, and DIRECT Staff to Coordinate with Application Permit Center (APC)

Economic Development Planner Salvador Morales presented on the Contra Costa County Unincorporated Business Survey. The presentation focused on how business owners are processing the current economic conditions.

The Committee Directed Staff to collaborate with the Permitting Center staff to integrate the business survey within their early interactions with prospective businesses. Also integrate BluDot software into the PUV application to increase the business contact database.

6. RECEIVE Report from and/or Provide Direction to Staff Regarding County Economic Development Work Program

The TeamCA Site Selectors Conference was held on November 5-7. A site tour was held which showcased TeamCA partner city locations for the invited private sector site selectors.

7. Committee Member Comments

The committee would like the BluDot invoice attached to the minutes for future reference.

8. Adjourn to the next meeting (February 2, 2026)

Sup. Burgis adjourned the meeting.

Invoice number F5642984-0002
Date of issue December 19, 2025
Date due January 18, 2026
PO Number 031602

Bludot Technologies Inc. 650 Castro St Ste 120 #96003 Mountain View, California 94041 United States	Bill to Contra Costa County CA Accounts Payable, Conservation & Development Building Inspection Division 30 Muir Rd. Martinez, California 94553 United States Lawrence.Huang@dcd.cccounty.us	Ship to Contra Costa County CA Accounts Payable, Conservation & Development Building Inspection Division 30 Muir Rd. Martinez, California 94553 United States
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\$8,340.00 USD due January 18, 2026

[Pay online](#)

Thank you for joining Bludot!

Description	Qty	Unit price	Amount
Bludot Economic Development Platform Dec 19, 2025 – Dec 19, 2026	1	\$8,340.00	\$8,340.00
Subtotal			\$8,340.00
Total			\$8,340.00
Amount due			\$8,340.00 USD

If paying by check, please make payable to Bludot Technologies Inc. and mail to:
Bludot Technologies Inc.
650 Castro St Ste 120 #96003
Mountain View, CA, 94041



CONTRA COSTA COUNTY

1025 ESCOBAR STREET
MARTINEZ, CA 94553

Staff Report

File #: 26-361

Agenda Date: 2/2/2026

Agenda #: 4.

Advisory Board: Economic Development Committee

Subject: Contra Costa Employment Trends Report

Presenter: Staff

Contact: Alyson (Greenlee) Escarzaga, 925-655-2783

Information:

See Report Attached.

Referral History and Update:

At its last meeting on December 1 2025, the Committee requested data to be included in the next meeting. Beacon Economics' latest quarterly trends report for Contra Costa County is attached.

Recommendation(s)/Next Step(s):

RECEIVE the Contra Costa Employment Trends Report for Q42025

Contra Costa County Employment Trends Report



Contra Costa County Overview

Similar to statewide trends, Contra Costa County's labor market growth has slowed over the last year. Total employment in the County rose by just 0.5%, trailing the state's growth rate of 1.0%. Payroll growth has remained positive due to a significant surge in the County's Health Care employment, which expanded by 6.4% year-over-year, just behind the state's 7.1% growth rate. Without these Health Care gains, employment levels in the County fell by 1.0% over the past year.

Gains in the Health Care sector are not surprising given Contra Costa County's aging population. The number of residents over the age of 65 grew by 53,014 from 2014 to 2024, a 33.6% increase; this compares to a 30.8% increase in this population in California overall. In addition, all of the County's major Health Care subsectors expanded over the last year, with Social Assistance and Nursing and Residential Care Facilities responsible for the majority of the job gains. Over the last five years, Health Care has expanded by 23.1% in the County, outpacing the state's 18.1% growth.

Payrolls in the Government sector in Contra Costa County expanded by 3.5% between the fourth quarter of 2023 and the fourth quarter of 2024, slightly more than the state's 3.2% growth rate. These recent gains have been fueled by the Local Government subsector. Payrolls in Transportation, Warehousing, and Utilities increased by 4.0% between the fourth quarter of 2023 and the fourth quarter of 2024, far outpacing the state's 0.4% growth rate. These gains were fueled by growth in the Warehousing and Storage and Truck Transportation subsectors.

Job losses have occurred in a handful of the County's major industries, but were most pronounced in Natural Resources and Construction, Retail Trade, and Manufacturing, which collectively shed over 3,700 jobs over the last year. In absolute terms, the largest losses occurred in Construction, driven primarily by a decline in the Specialty Trade Contractors and Construction of Buildings subsectors. Natural Resources and Construction, Manufacturing, and Retail Trade all contracted more than the state average.

Job growth in Contra Costa County has slowed sharply and has now turned negative, as projected in Beacon Economics' previous report. Data from the Bureau of Labor Statistics' Quarterly Census of Employment and Wages (QCEW) indicates that total employment across the County declined by 0.3% between the first quarter of 2024 and the first quarter of 2025 (latest available data), marking the first annual decline in four years.

Contra Costa County Employment Trends Report

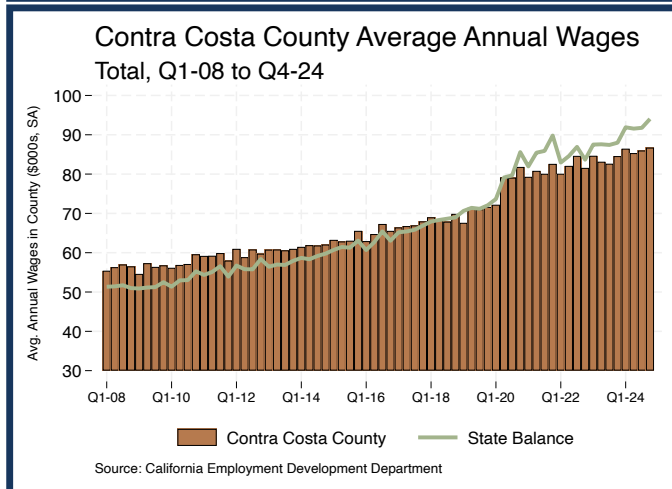
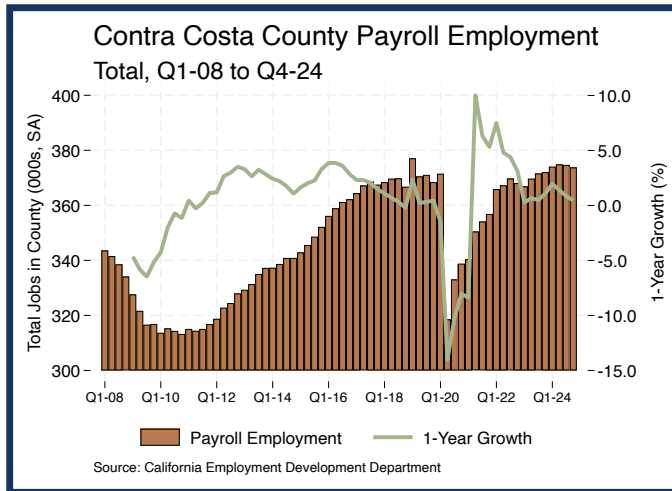


Table 1: Establishment Births/Deaths

Year	Firm Births	Firm Deaths	Total Net Increase	Total Firms*
2020	860	472	+388	16,092
2021	862	665	+197	16,289
2022	1384	472	+912	17,201
2023	890	418	+472	17,673
2024	889	351	+538	18,211

*Establishments with 3 or more employees

Table 2: Employment in Q4-24 by Establishment Size

Establishment Type	Total Emp.	Growth Since Q4-23 (%)	Total Est.
Less than 4 Employees	36,421	7.1	23,126
4 to 9 Employees	39,098	1.3	5,672
10 to 49 Employees	108,469	-0.5	4,997
50 to 250 Employees	109,254	-1.2	1,133
More than 250 Employees	82,871	0.3	120

Overview

- Payroll employment in Contra Costa County has grown 1.5% over the last five years, trailing the 3.1% increase in California as a whole over the same period.
- At the industry level, Health Care; Government; Transportation, Warehousing, and Utilities; Leisure and Hospitality; and Education added the largest number of jobs in Contra Costa County from the fourth quarter of 2023 to the fourth quarter of 2024.
- Wages in Contra Costa County grew by 2.6% from the fourth quarter of 2023 to the fourth quarter of 2024. This trails the 6.9% increase in California as a whole over the same period.
- At the industry level in Contra Costa County, Health Care; Transportation, Warehousing, and Utilities; Government; Education; and Leisure and Hospitality wages were the fastest growing from the fourth quarter of 2023 to the fourth quarter of 2024.
- Over the last year, employment growth was strongest at establishments employing fewer than four workers, with those payrolls growing by 7.1% from the fourth quarter of 2023 to the fourth quarter of 2024.
- Small businesses in Contra Costa County increased their payrolls by 0.7% from the fourth quarter of 2023 to the fourth quarter of 2024, outpacing the largely unchanged growth across all private industries.

Employment Growth

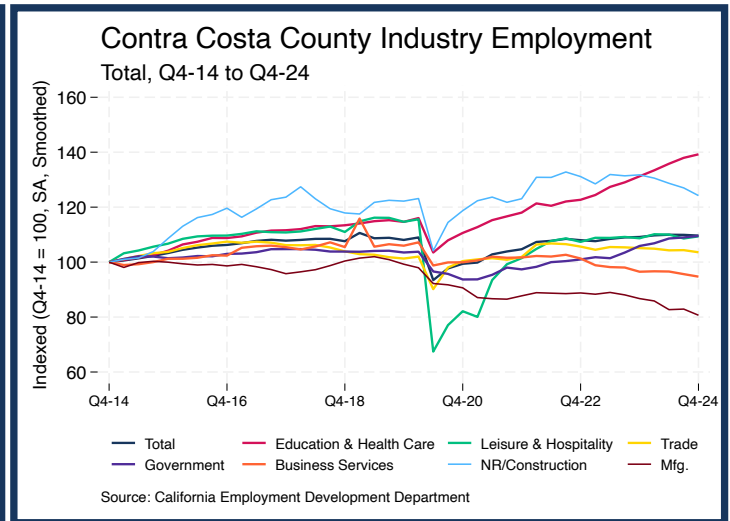
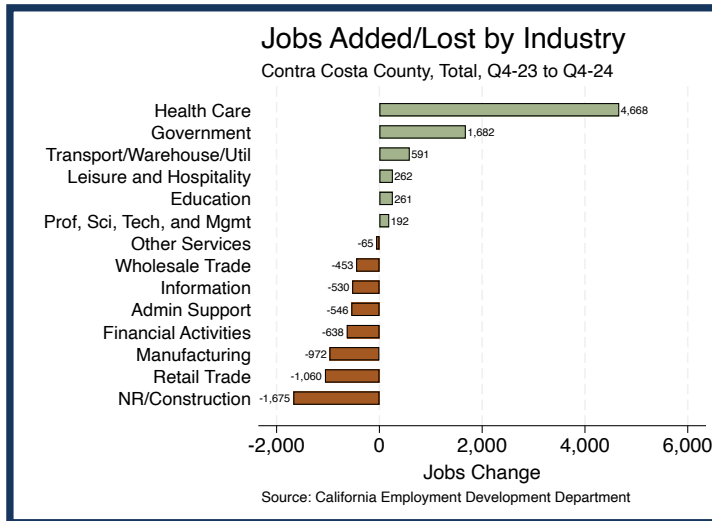


Table 3: Employment by Industry: Q4-24

Industry	Employment (#)	1-Year Growth County (%)	1-Year Growth State (%)	5-Year Growth County (%)	5-Year Growth State (%)	County Location Quotient
Health Care	77.6	+6.4	+7.1	+23.1	+18.1	1.3
Leisure and Hospitality	40.7	+0.6	+0.2	-4.6	-0.1	1.0
Retail Trade	39.9	-2.6	-0.8	-3.8	-4.1	1.2
Prof, Sci, Tech, and Mgmt	30.7	+0.6	+2.8	-5.7	+5.6	0.9
NR/Construction	27.6	-5.7	-1.7	+1.7	-0.4	1.0
Financial Activities	22.6	-2.7	-0.9	-16.6	-5.7	1.4
Admin Support	22.4	-2.4	-1.4	-6.0	-4.5	1.0
Transport/Warehouse/Util	15.3	+4.0	+0.4	+34.3	+16.2	0.9
Other Services	13.1	-0.5	+0.6	+1.5	+6.5	1.1
Manufacturing	12.9	-7.0	-6.4	-18.7	-6.3	0.5
Education	8.2	+3.3	+2.9	+7.4	+11.5	1.1
Wholesale Trade	7.8	-5.5	-1.2	-10.9	-4.7	0.6
Information	5.0	-9.6	-1.2	-26.6	-4.3	0.5
Total Private	323.9	+0.0	+0.6	+0.8	+2.7	1.0
Government	49.9	+3.5	+3.2	+5.8	+6.0	0.9
Total	373.8	+0.5	+1.0	+1.5	+3.1	1.0

Table 4: One-Year Employment Growth

Fastest Growing Subsectors with 250+ employees: Q4-24

Subsector	Total Emp.	Growth (%)	Wage (\$000s)
Admin of Economic Programs	856	+37.1	71.6
Heavy and Civil Engineering Construction	4,259	+35.6	147.2
Warehousing and Storage	2,678	+33.6	109.4
Chemical Mfg	1,550	+29.1	122.9
Admin of Environmental Quality Programs	825	+14.9	79.9
Social Assistance	26,397	+12.7	34.0

Wage Growth

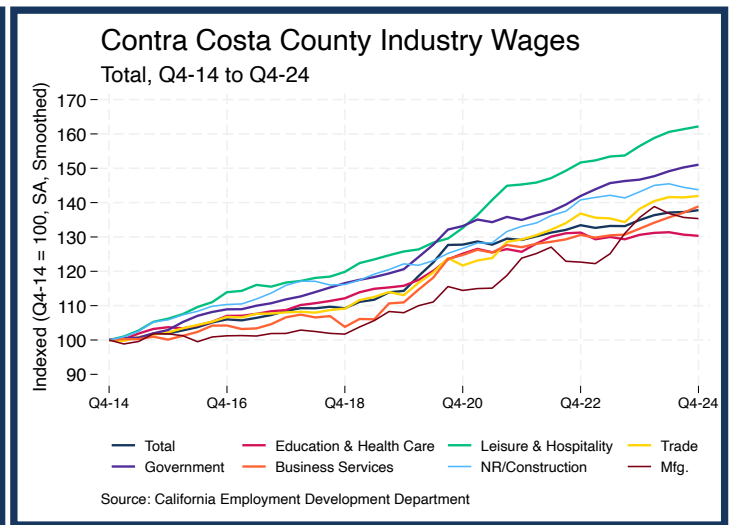
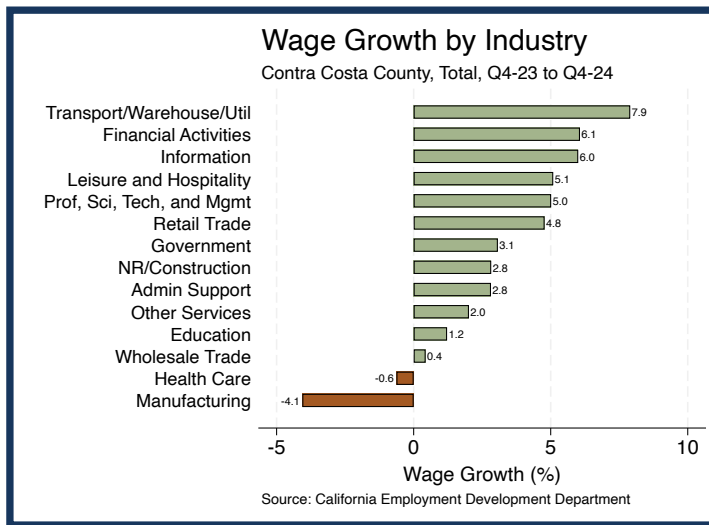


Table 5: Annual Average Wages by Industry: Q4-24

Industry	Avg. Wage (\$000s)	1-Year Growth County (%)	1-Year Growth State (%)	5-Year Growth County (%)	5-Year Growth State (%)	County vs. State (%)*
Information	165.7	+6.0	+20.4	+37.9	+57.9	-46.8
Prof, Sci, Tech, and Mgmt	151.0	+5.0	+19.0	+22.8	+42.5	-18.3
Financial Activities	141.5	+6.1	+2.9	+26.9	+24.8	-1.9
Manufacturing	123.2	-4.1	-4.9	+22.7	+22.2	1.8
Transport/Warehouse/Util	118.3	+7.9	+5.5	+15.9	+29.3	35.9
Wholesale Trade	104.4	+0.4	+3.0	+7.7	+30.7	-0.7
NR/Construction	99.2	+2.8	+5.2	+19.5	+24.2	28.6
Health Care	78.0	-0.6	+2.0	+12.0	+22.8	19.5
Admin Support	71.6	+2.8	+1.8	+34.4	+32.7	11.4
Other Services	53.4	+2.0	+2.2	+24.4	+32.2	-3.0
Retail Trade	52.4	+4.8	+4.4	+34.9	+28.7	5.8
Education	49.3	+1.2	+2.9	+16.1	+19.9	-27.7
Leisure and Hospitality	33.3	+5.1	+6.2	+31.3	+26.3	-19.6
Total Private	85.9	+2.4	+6.8	+20.3	+31.0	-8.7
Government	92.0	+3.1	+7.4	+25.4	+27.0	-1.9
Total	86.7	+2.6	+6.9	+21.0	+30.4	-7.8

*Industry wage relative to the average annual wage for the industry in the State

Table 6: One-Year Wage Growth

Fastest Growing Subsectors with 250+ employees: Q4-24

Subsector	Wage (\$000s)	Growth (%)	Total Emp.
Warehousing and Storage	109.4	+23.0	2,678
Health and Personal Care Retailers	58.6	+21.3	2,706
Securities, Commodity Contracts, and Other Finan	259.3	+14.5	2,614
Computing Infrastructure Providers, Data Process	198.8	+10.6	489
Nonmetallic Mineral Product Mfg	111.6	+9.3	457
Building Material and Garden Equipment And Suppl	53.3	+8.7	3,609

Small Business Insights¹

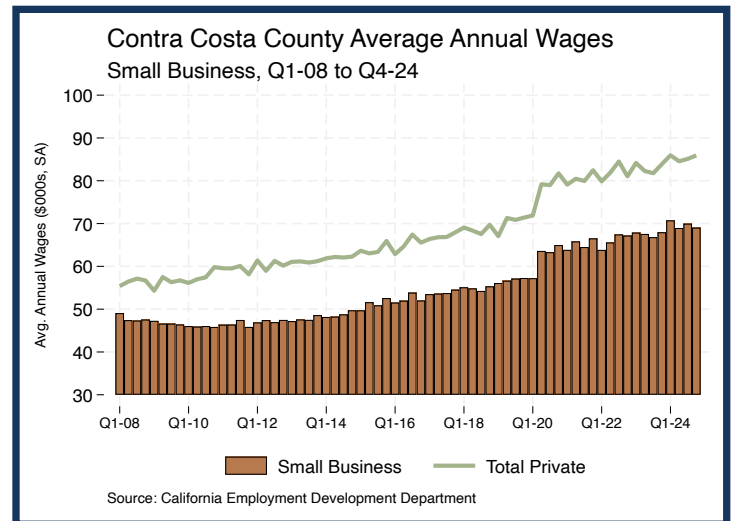
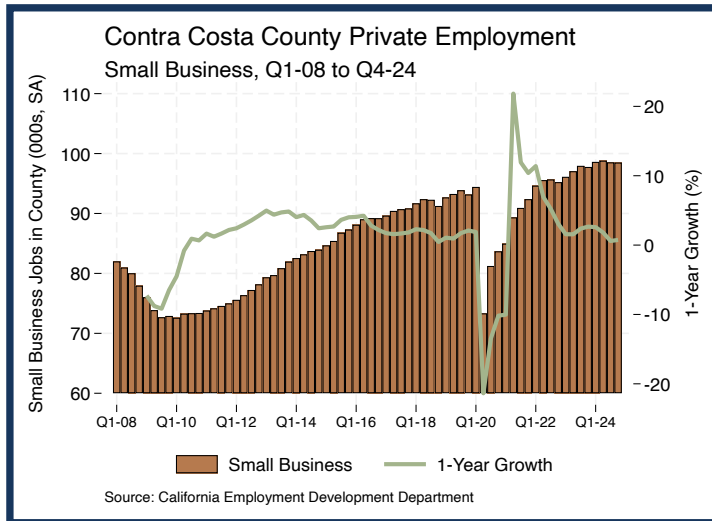


Table 7: Small Business Employment by Industry: Q4-24

Industry	Employment (#)	1-Year Growth		Small Share of Total (%)
		Small Business (%)	Total Private (%)	
Leisure and Hospitality	18,967	+0.8	+0.6	46.6
Health Care	16,440	+6.2	+6.4	21.2
NR/Construction	13,569	-2.6	-5.7	49.2
Prof, Sci, Tech, and Mgmt	10,688	+0.5	+0.6	34.8
Other Services	7,278	+1.1	-0.5	55.6
Admin Support	7,234	+0.5	-2.4	32.3
Retail Trade	6,308	-0.2	-2.6	15.8
Financial Activities	4,906	-1.3	-2.7	21.7
Manufacturing	3,538	-6.3	-7.0	27.3
Education	3,495	+4.8	+3.3	42.6
Wholesale Trade	3,111	-0.9	-5.5	40.0
Transport/Warehouse/Util	1,866	+0.8	+4.0	12.2
Information	1,101	-1.1	-9.6	22.0
Total Private	98,501	+0.7	+0.0	30.4

Table 8: Small Business Annual Avg. Wages by Industry: Q4-24

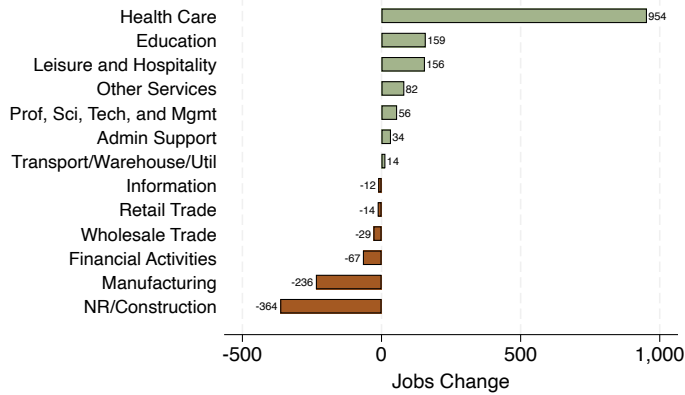
Industry	Avg. Wage (\$000s)	1-Year Growth		Small vs. Total (%)*
		Small Business (%)	Total Private (%)	
Information	154.2	+0.3	+6.0	-6.9
Financial Activities	121.4	+11.5	+6.1	-14.2
Prof, Sci, Tech, and Mgmt	120.6	+4.7	+5.0	-20.1
Wholesale Trade	99.6	+0.5	+0.4	-4.6
Manufacturing	88.5	-14.9	-4.1	-28.1
NR/Construction	82.3	+1.9	+2.8	-17.1
Transport/Warehouse/Util	64.0	+0.8	+7.9	-45.9
Admin Support	62.8	+1.6	+2.8	-12.4
Health Care	60.4	+0.2	-0.6	-22.6
Retail Trade	53.1	+6.1	+4.8	1.2
Other Services	52.5	+0.8	+2.0	-1.8
Education	38.9	+4.1	+1.2	-21.2
Leisure and Hospitality	31.1	+2.7	+5.1	-6.8
Total Private	69.1	+1.6	+2.4	-19.6

*Industry wage relative to the average annual wage for the industry in the County

¹Small business is defined as businesses with only one establish and between 4 and 49 employees

Jobs Added/Lost by Private Industry

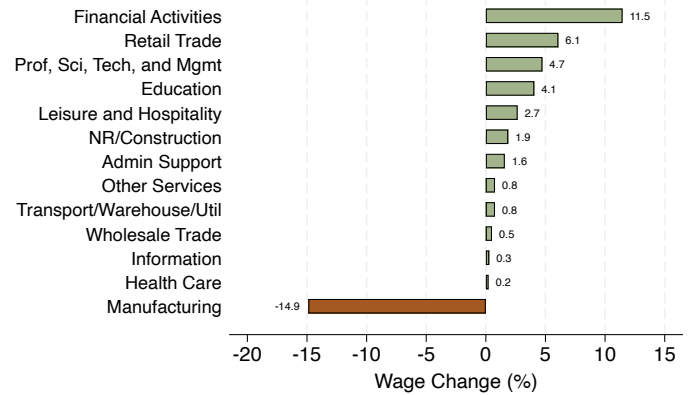
Contra Costa County, Small Business, Q4-23 to Q4-24



Source: California Employment Development Department

Wage Growth by Private Industry

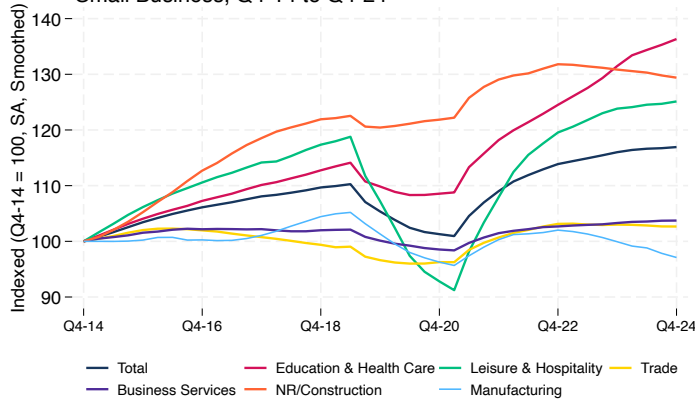
Contra Costa County, Small Business, Q4-23 to Q4-24



Source: California Employment Development Department

Contra Costa County Private Industry Employment

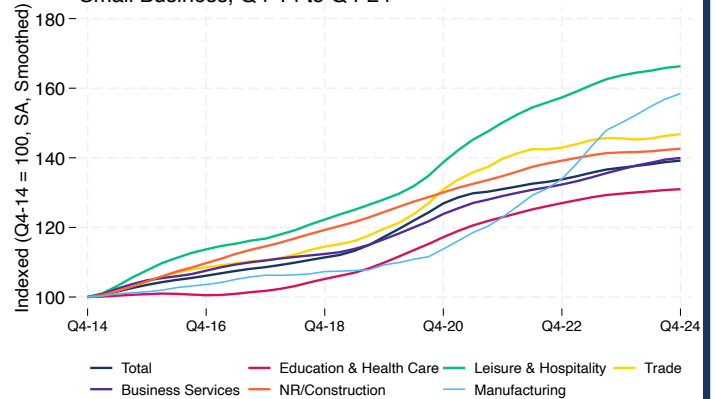
Small Business, Q4-14 to Q4-24



Source: California Employment Development Department

Contra Costa County Private Industry Wages

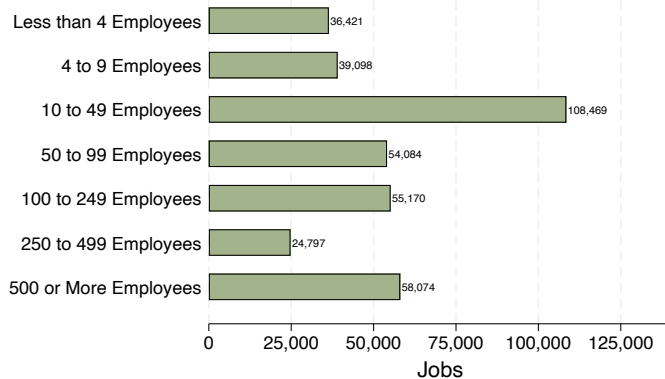
Small Business, Q4-14 to Q4-24



Source: California Employment Development Department

Jobs by Establishment Size

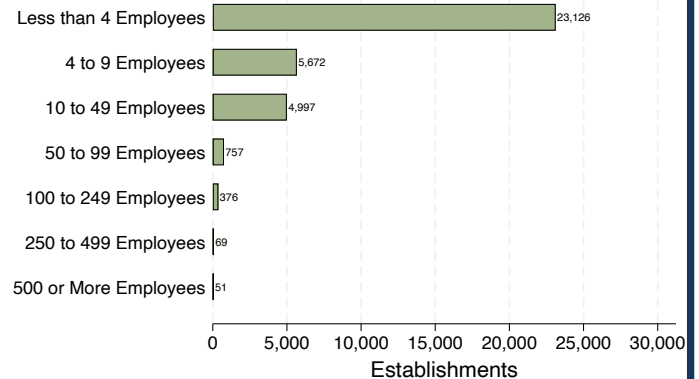
Contra Costa County, Q4-24



Source: California Employment Development Department

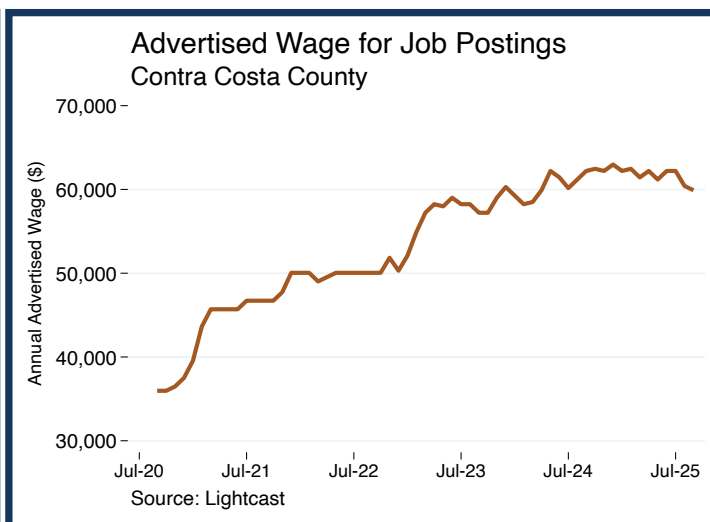
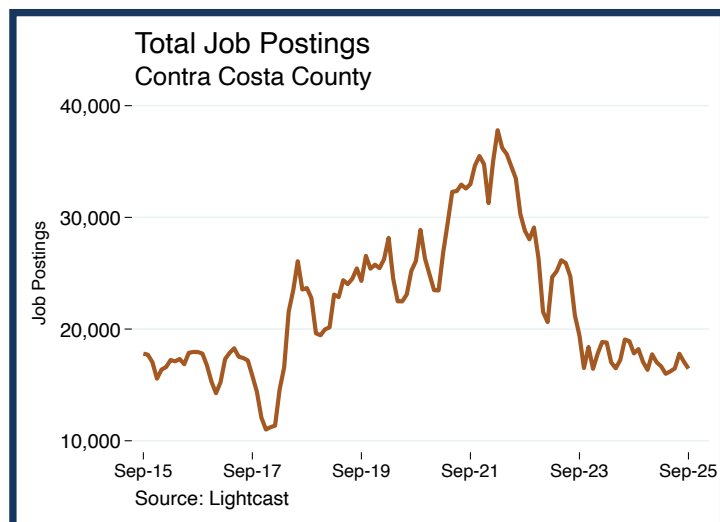
Establishments by Establishment Size

Contra Costa County, Q4-24



Source: California Employment Development Department

Job Postings



Contra Costa County Job Postings

Industry	Job Postings Sep-24	Job Postings Sep-25	1-Year (Change)
Total	18391	17055	-1336
Education/Health	4304	4539	235
Unclassified Industry	2759	2923	164
Retail Trade	2482	2039	-443
Prof, Sci, Tech, and Mgmt	1503	1528	25
Financial Activities	1103	1099	-4
Leisure and Hospitality	1501	1088	-413
Manufacturing	951	769	-182
Admin Support	778	644	-134
Transport/Warehouse/Util	643	527	-116
Other Services	538	502	-36
NR/Construction	512	428	-84
Wholesale Trade	634	400	-234
Public Administration	412	317	-95
Information	271	252	-19

Data Description

The data contained within this report are derived from establishment-level payroll data furnished by the California Employment Development Department (EDD). The EDD collects employment and wage data for every establishment enrolled in the State's Unemployment Insurance program. Entities such as nonprofit organizations that employ less than 4 workers, railroad workers, and workers in school systems that are owned and operated by religious institutions are omitted from this data set.

In order to link individual establishments from one quarter to the next, Beacon Economics developed a method of cleaning, processing, and linking the raw data provided by the EDD. This process amends, adds, or deletes data items, so there will not be a one-to-one relationship between the raw EDD data and the post-process data. Here is a list of a few key steps made by Beacon Economics while processing the data.

- Matching individual establishment records over time
- Re-examining records without exact matches
- Ensuring that cleaning process has resulted in a consistent time series
- Creating consistent industry codes for establishments over time

The publication of data that would disclose an individual firm's employment or wage information is prohibited under the Bureau of Labor Statistic's guidelines of confidentiality. Aggregate data is not published if it represents fewer than three private employers or if one private employer represents 80% or more of the data.

About Beacon Economics

Founded in 2007, Beacon Economics, an LLC and certified Small Business Enterprise with the state of California, is an independent research and consulting firm dedicated to delivering accurate, insightful, and objectively based economic analysis. Employing unique proprietary models, vast databases, and sophisticated data processing, the company's specialized practice areas include sustainable growth and development, real estate market analysis, economic forecasting, industry analysis, economic policy analysis, and economic impact studies. Beacon Economics equips its clients with the data and analysis required to understand the significance of on-the-ground realities and to make informed business and policy decisions.

Learn more at www.BeaconEcon.com



CONTRA COSTA COUNTY

1025 ESCOBAR STREET
MARTINEZ, CA 94553

Staff Report

File #: 26-362

Agenda Date: 2/2/2026

Agenda #: 5.

Advisory Board: Economic Development Committee
Subject: Economic Development Work Program Update
Presenter: Staff
Contact: Alyson (Greenlee) Escarzaga, 925-655-2783

Information:
Staff Report is below.

Referral History and Update:

Since the last meeting of the Committee on December 1, 2025, various elements of the economic development work program have proceeded. This report includes updates on multiple efforts:

- **Brownfields Remediation:** On December 12, 2025, Economic Development staff from the County and other local agencies released a Request for Qualifications (RFQ) for Environmental Protection Agency (EPA) Brownfields Coalition Grant to seek qualified and experienced firms to conduct technical analysis for the EPA Brownfields Coalition Assessments grant. County staff convened a meeting of all the agencies that are part of the Coalition in a meeting on January 21, 2026.
- **Business Startup/Retention Assistance:** Economic development staff from the County have met with over 25 businesses with: Assistance with access to grant funding for the development of a grocery store (assist job training/placement programs and small business/microenterprise technical assistance programs), access to grant funding for community investment funds (Bay Area Air District Local Community Benefits funding), access to grant funding for the development of affordable housing, access to grant funding for brownfields development, access to potential new markets for networking (access to Diablo Valley Tech Initiative), access to code enforcement complaints (Department of Conservation & Development code enforcement complaint form), invitations to the Manufacturers Roundtable.
- **Bludot Customer Relationship Management Email Marketing:** Economic development staff from the County have sent out emails to 1) manufacturing businesses, and 2) small businesses that have been opened by over 1,073 businesses (See Attachments).
- **MTC-ABAG Northern Waterfront Priority Production Areas (PPA) Project:** Economic development staff from the County convened a meeting with the PPA jurisdictions on January 13, 2026 to review the Memos on the Northern Waterfront (See Attachments).
- **Business Expansion/Attraction Assistance:** Economic development staff from the County have met and supported over 10 businesses with: Assistance with permitting timelines (meetings with Application Permit Center planning staff), assistance with site / zoning enquiries, assistance with incentives (referrals to State of California Employment Training Panel (ETP) funding, State of California GO-Biz incentives, Workforce Development Board of Contra Costa County (WDBCCC) incentives), access to site location assistance.

- Governor's Office of Business & Economic Development (GO-Biz) Requests for Information (RFIs): Economic development staff from the County reviewed four (4) Request for Information (RFI) from the Governor's Office of Business of Business & Economic Development (GO-Biz) and submitted responses to two (2) RFIs.
- Green Empowerment Zone: Economic Development staff from the County continue to provide staffing support to the Governing Board of the Green Empowerment Zone, which met on November 21, 2025.
- Diablo Valley Tech Initiative (DVTI): Economic Development staff from the County participated in the Diablo Valley Tech Initiative (DVTI)'s monthly meetings on January 6, 2026, and referred County businesses to participate as speakers and attended the Funders & Founders event in Walnut Creek on January 27, 2026.
- Crockett Chamber of Commerce: Economic development staff from the County visited the Crockett Chamber of Commerce's newly opened Visitor's Center located at 628 2nd Ave and open Fridays-Sundays from 12-4pm. Economic development staff from the County dropped in to make connections with newly-opened Crockett business (Ruby Q Smoke Fusion) that were referred to Economic Development from the Application & Permit Center (APC).
- U.S. Economic Development Administration: Economic development staff from the County continued to monitor an application for a \$1.2 million grant to support the pre-development strategy for high-performance battery manufacturing on the Northern Waterfront with the U.S. Department of Commerce.
- Walnut Creek Chamber of Commerce: Economic development staff from the County presented at the meeting on January 21, 2026 on the Meet the Consultants Site Selection & Economic Development Forum.
- East Contra Costa Cities Meeting: Economic development staff from the County participated in the East Contra Costa quarterly meeting of economic developers on December 8, 2025.
- Bay Front Chamber: Economic development staff from the County participated in the Mega Mixer (Hercules) on January 26, 2026.
- Other Key Meetings: Economic development staff from the County participated in key meetings with: East Bay Economic Development Alliance Economic Development Directors' Council (December 4, 2025), Local Government Oil & Gas Working Group (December 9, 2025), San Pablo Economic Development Corporation to discuss resource programs for business (December 11, 2025), Hazardous Materials Commission for connection points to EPA Brownfields Grant (December 11, 2025), TeamCalifornia (January 21, 2026), Pittsburg Chamber of Commerce Business Mixer (January 22, 2026), Bay Area Jobs First Collaborative (January 28, 2026), 3rd Annual State of the Black Economy in Sacramento (January 28, 2026).

Economic development activities are funded by a General Fund allocation of \$500,000 dating from 2017-18. As of October 31, 2025, there was a balance of \$115,828.14 for Economic Development.

Recommendation(s)/Next Step(s):

RECEIVE Report From and/or Provide Direction to Staff Regarding County Economic Development Work Program



Dear Contra Costa Manufacturing Community,

Happy New Year, we at Contra Costa County wish you nothing but success in 2026.

We would like to share an important opportunity. The East Bay Economic Development Alliance (East Bay EDA), in partnership with the Association of Manufacturers (AMBayArea) and EASTBAYWorks, is hosting an exclusive executive roundtable on February 19 as part of the Bay Area Jobs First Collaborative. This session will focus on regional opportunities and practical strategies to support and grow the manufacturing sector.

Why this matters

- Special guest: State Senator Tim Grayson, a legislative champion for the industry, will join the conversation.
- Who will attend: Manufacturing executives, workforce development leaders, education partners, and economic development stakeholders.

Purpose

- Share real-world challenges, influence regional workforce, and support initiatives, and help shape services that directly address manufacturers' needs.

Event details

- Date: February 19
- Format: Invitation-only executive roundtable (focused, action-oriented discussion)
- How to register: Manufacturers are encouraged to register [here](#) to secure a seat.

Sincerely,

Economic Development Team



Good morning

The County Economic Development team would like to share this grant opportunity to our business community. Please find the information below.

PROGRAM OVERVIEW

The Amex Shop Small Grants Program, in partnership with American Express®, will fund more than 500 grants of \$20,000 each, empowering small businesses to grow, innovate, and support their local communities. The program was initially launched with a \$5 million contribution, and as a result of its giving pledge for eligible transactions made on Small Business Saturday®, American Express will now contribute an additional \$5.1 million to the program – totaling over \$10 million in grants.

The Amex Shop Small Grants Program reflects the shared commitment of American Express and Main Street America to champion small businesses that strengthen communities and help local economies thrive.

Recipients will have a 6 month period in which to complete their projects, so applicants are encouraged to prepare a “ready-to-execute” project plan and a detailed, itemized budget. During that period, Main Street America will provide opportunities for grant recipients to connect and network with each other, complete self-guided e learning courses, and share the story of their business and their Amex Shop Small Grants Program project journey with a variety of audiences.

Applications will be open from Small Business Saturday, November 29, 2025, to Friday, January 23, 2026 at 11:59 CT.

IMPORTANT UPDATE: The application submission deadline has been extended from Friday, January 16, 2026, at 11:59 p.m. CT to Friday, January 23, 2026, at 11:59 p.m. CT.

Sincerely,

Economic Development Team

Industrial Lands Economic and Market Insights

This Memorandum (Memo) is a review of economic and market conditions of Priority Production Areas (PPA) in the Contra Costa County Northern Waterfront Economic Development area (NWED). This area is the focus of a Contra Costa County economic development initiative (NWEDI) to create 18,000 new jobs by 2035. The NWEDI leverages existing competitive advantages by focusing on five industry clusters: Advanced transportation, advanced manufacturing, biomedical/biotech, agriculture technology & food processing, and clean technology.

As described by the Metropolitan Transportation Commission (MTC), PPAs are “areas where clusters of industrial businesses can locate and be connected and well served by the region’s transportation network.” MTC requires that PPAs be:

- Zoned for industrial use or have predominantly industrial uses.
- Located outside Priority Development Areas and other areas within walking distance of a major rail commute hub.
- Located in jurisdictions with a certified housing element.

Information in this Memo is primarily informed by an online inventory of industrial lands in and around the seven NWED PPAs. The online inventory is an ongoing effort developed as part of the East Bay PPA Technical Assistance project. The PPAs include:

1. **Pacheco Manufacturing Zone.** This 4,700-acre PPA in unincorporated Contra Costa County is the largest PPA in the NWED. It is located northeast of the intersection of Interstate 680 (I-680) and State Route 4 (SR-4), north of the City of Concord and east of the City of Martinez. It includes an eastward “extension” along Contra Costa Canal that forms an approximately 100-acre bulb of land. The PPA is bisected by the Burlington Northern and Santa Fe (BNSF) and Union Pacific (UP) railways and includes regional airport Buchanan Field. Most of the land is zoned H-I (Heavy Industrial).
2. **Northern Concord PPA.** This 495-acre PPA includes two discontinuous areas in the City of Concord, both share borders with the Pacheco Manufacturing Zone PPA. One area is located immediately north of SR-4 and the other is immediately south of SR-4. The areas are primarily zoned Heavy Industrial (HI).
3. **Western Concord PPA.** This relatively small PPA includes two discontinuous areas in the City of Concord that total about 112 acres. The larger area is a pocket of Office Business Park (OBP), Industrial Business Park (IBP) and Industrial Mixed Use (IMU) zoning located south of Monument Boulevard immediately west of the Bay Area Rapid Transit (BART) right-of-way. The smaller area is east of the BART and zoned OBP.
4. **Baypoint Industrial Sector.** This 188-acre PPA is in unincorporated Contra Costa, within the City of Pittsburg Sphere of Influence (SOI). It is about 0.5 miles north of SR-4 and 7.5 miles east of I-680,

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directly south of the BNSF and UP railways. The entire PPA is zoned P-1 (Planned Unit) by Contra Costa County. PPA parcels are designated industrial by the P-1 ordinance.

5. **Northern Waterfront.** This 1,243-acre PPA is in northeastern Pittsburg, north of SR-4 and east of Downtown Pittsburg. The BNSF railway runs through the northern part of the PPA, and the UP runs through the southern part. Most of the land is zoned General Industrial, with small areas of Limited Industrial and Service Commercial in the south.
6. **Northern Waterfront Industrial Corridor.** Most of this 1,027-acre PPA is in the north/northeastern areas of the City of Antioch. The far northeastern corner of the PPA is in unincorporated Contra Costa but within Antioch's SOI. The PPA is about 1.0 miles north of SR-4 and 0.5 miles north of the UP railway. The northern half of the PPA is zoned Industrial while most of the southern half is zoned Commercial or Special/Study District.
7. **Oakley Employment Area.** This 758-acre PPA is in the northwest corner of the City of Oakley. It is immediately adjacent to the Northern Waterfront Industrial Corridor, just over 0.5 miles north of SR-4. The BNSF railway bisects the middle of the PPA. The PPA has mix of commercial, industrial, utilities and specific plan zoning.

1. *Economic and Industrial Market Data*

An examination of local and regional employment, workforce, and industrial real estate trends provides important insights into the competitive position of the Northern Waterfront for maintaining and growing the industrial sector. This section evaluates data on job composition and growth in the Northern Waterfront and adjacent areas relative to County-wide and regional trends and its manifestation in the industrial real estate market. It also evaluates the degree to which the local workforce is matched with industrial job opportunities.

Two important sources of real estate, job, and employment data are CoStar and the U.S. Census tool "OnTheMap." However, data from these sources are not uniformly available at the level of MTC's PPAs. Therefore, this analysis includes data for three inter-related geographies and five unique sub-markets developed based on available data. These are illustrated in **Figure 1** and represented on Tables 1 through 4. Except for the Pacheco Manufacturing Zone, the boundaries of the five sub-markets do not match the boundaries of the seven MTC PPAs. However, they offer a relevant window into local economic and real estate market dynamics using readily available data. The geographies and sub-markets are summarized below:

1.1 NWED GEOGRAPHIES

- **NWED:** Corresponds to the entirety of the Northern Waterfront area between Suisun Bay/San Joaquin River and SR-4, including both incorporated and unincorporated areas.

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- **NWED+6:** Includes the NWED area and adjacent incorporated portions of Hercules, Martinez, Concord, Pittsburg, Antioch and Oakley, which extend south and east of SR-4. This geography is used for workforce and employment data.
- **NWED+4:** Due to limitations on the availability of geographically-specific real estate market data, Section 4, Industrial Real Estate Trends, includes data for the NWED area and four major sub-markets that roughly correspond to the cities of Antioch, Concord, Pittsburg/Bay Point and Oakley.

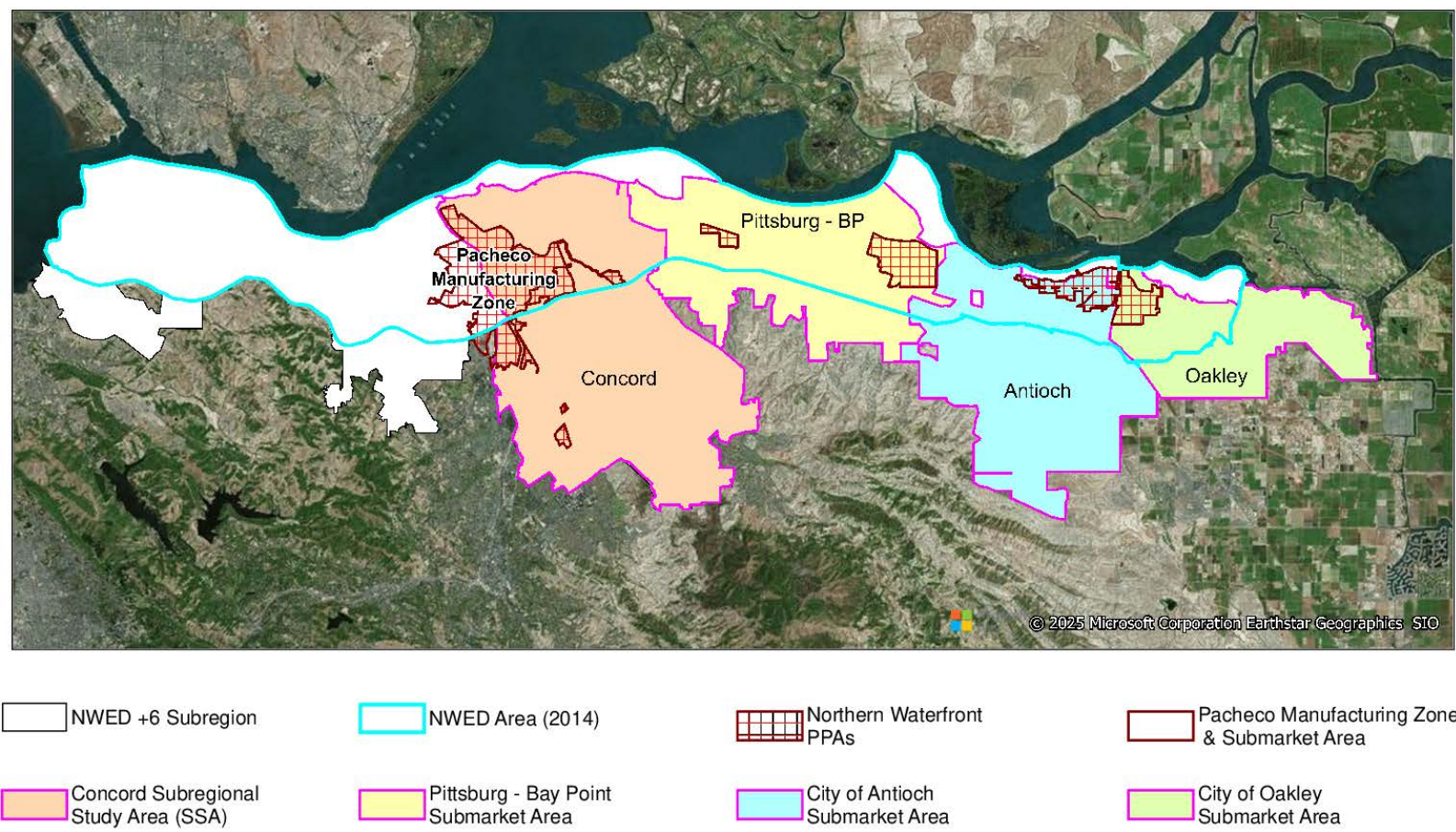
1.2 NWED SUB-MARKETS

The following five NWED sub-markets were selected to include cities within the NWED plus relevant adjacent unincorporated areas. Except for the Pacheco Manufacturing Zone sub-market, whose boundary matches that of the Pacheco Manufacturing Zone PPA, these are citywide sub-markets intended to capture market data surrounding the smaller PPAs.

- **Pacheco Manufacturing Zone.** This sub-market was adapted to the boundaries of the Pacheco Manufacturing Zone PPA, which crosses jurisdictional boundaries.
- **Concord Subregional Study Area (SSA).** This sub-market contains the Western Concord PPA and Northern Concord PPA.
- **Pittsburg-Bay Point.** This sub-market contains the Baypoint Industrial Sector PPA and Northern Waterfront PPA.
- **Antioch.** This sub-market contains the Northern Waterfront Industrial Corridor PPA.
- **Oakley.** This sub-market contains the Oakley Employment Area PPAs.

There are no PPAs and no sub-markets in or west of Martinez.

Figure 1: Map of NWED Geographies and Sub-Markets



1.3 RELATIONSHIP TO THE CONTRA COSTA GREEN EMPOWERMENT ZONE

The [Green Empowerment Zone](#) (GEZ) is a designated economic development initiative that aims to drive a transition to clean energy manufacturing and related industries in California's Bay Area. It is primarily focused on the Northern Waterfront area of Contra Costa County and extends to parts of Solano County. Geographically, the GEZ encompasses all seven PPA's in the NWED area. It extends beyond the PPAs to include all of Brentwood, El Cerrito, Hercules, Oakley, Pinole, Richmond, San Pablo, the Byron Airport and adjoining unincorporated land in Contra Costa County, Vallejo, Benicia, and adjoining unincorporated land in southern Solano County.

Pursuant to California Government Code Section 7599.100, the purpose of the GEZ is to build upon the comparative advantages provided by the regional concentration of highly skilled energy industry workers by prioritizing access to tax incentives, grants, loan programs, workforce training programs, and private sector investment in the renewable energy sector.

The primary duties of the GEZ are as follows:

- Identify projects and programs that leverage federal, state, local, and private sector resources to support the development of the clean energy economy in the Northern Waterfront area.
- Work with members of the state's congressional delegation and relevant federal interagency task forces, to gain federal support for projects identified by the GEZ as critical to the region's energy economy.
- Partner with the University of California, other research and educational institutions, and private foundations to provide guidance and support of studies significant to the energy industry in the Northern Waterfront area.
- Review state policies and regulations to ensure they benefit the state's diverse geographic regions, including the Northern Waterfront area, and assess the need for more efficient alternative approaches.
- Make recommendations to the Governor that would improve the economic well-being of the region and the quality of life of its residents.
- Create and maintain an internet website that is managed and updated by an entity designated by the GEZ board of directors.

The GEZ can help advance a subset of NWEDI goals, particularly in sustainable economic revitalization. Both the GEZ and NWEDI address the Northern Waterfront area and emphasize job creation, workforce development, and growth of clean manufacturing in an area with disadvantaged communities historically burdened by the fossil fuel industry. Where the NWEDI provides a broad strategy that covers five industry clusters, of which clean tech is one, the GEZ focuses on clean energy only. However, the clean energy policy and regulatory recommendations made by GEZ will cover the entire NWED area (as well as areas

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outside the Northern Waterfront and Contra Costa County). As such, the work of the two efforts will overlap, particularly regarding areas of the NWED impacted by traditional industry.

2. *Employment Trends*

Table 1 compares industrial job growth trends in the Northern Waterfront and the Bay Area between 2002 and 2022 (most recent year available) based on data from the Census and Bureau of Labor Statistics.¹ Overall, jobs in the Association of Bay Area Governments (ABAG) Region grew by about 26 percent over this period (about 1.1 percent annually), with largest gains fueled by technology sectors and centered in the San Francisco and Silicon Valley markets. Industrial sectors experienced positive job growth throughout the nine-county Bay Area, adding almost 50,000 total jobs. However, the share of industrial jobs relative to the total economy has declined, dropping from 26 percent to 22 percent of total jobs from 2002 through 2022. This decline in the relative share of industrial jobs mirrors national trends and can be attributable to a variety of factors, including increased worker productivity, outsourcing to lower cost markets, and the emergence of other sectors (e.g., high technology, health care, services). MTC's PPA program is intended to preserve and expand industrial jobs as a key piece of the region's economy.

Job growth in Contra Costa County and the northern waterfront, as well as in industrial sectors, has lagged regional trends. Industrial jobs currently represent a smaller share of the economy in the NWED and adjacent incorporated cities (18 percent in NWED +6) relative to the Bay Area (22 percent) and Alameda County (29 percent). This economic profile mirrors the composition of Contra Costa County as a whole, as industrial jobs account for 16 percent of County jobs. This makes sense, given that the NWED+6 area includes the entirety of the incorporated cities of Hercules, Martinez, Concord, Pittsburg, Antioch, and Oakley, which contain a diversity of jobs. While industrial sectors are slightly more prevalent when looking at the NWED area exclusively (24 percent of total jobs), the NWED area accounts for a relatively small share of total jobs in Contra Costa County (about 67,340 out of 380,000 County jobs, or 18 percent).

¹ For the purposes of this analysis, the industrial sectors are inclusive of NAICS manufacturing, wholesale trade, transportation and warehousing, administrative support & waste management and remediation, and utilities sectors.

TABLE 1 NWED, REGIONAL, AND SUB-MARKET JOB GROWTH 2002-2022

Location	2002 Jobs			2022 Jobs			2002 - 22 Growth in Industrial Jobs	
	All Jobs	Industrial Jobs ¹	Industrial as % of total	All Jobs	Industrial Jobs ¹	Industrial as % of total	Amount	% Change
Regional / Sub-Regional Overview								
ABAG Region	3,197,984	842,520	26%	4,015,993	890,980	22%	48,460	6%
Alameda County	690,591	207,200	30%	819,506	233,936	29%	26,736	13%
Solano County	117,832	24,902	21%	137,071	25,985	19%	1,083	4%
Contra Costa County	324,318	55,682	17%	379,038	60,717	16%	5,035	9%
NWED +6²	119,131	22,738	19%	140,768	25,299	18%	2,561	11%
NWED Area³	56,256	13,673	24%	67,340	16,391	24%	2,718	20%
Selected NWED Sub-markets⁴								
Pacheco Mfg. Zone ⁵	6,279	3,279	52%	4,496	1,851	41%	(1,428)	-44%
Concord Subregional Study Aea (SSA) ⁵	59,095	11,984	20%	62,861	12,093	19%	109	1%
Pittsburg-Bay Point	13,361	3,576	27%	16,346	3,280	20%	(296)	-8%
Antioch	16,882	2,184	13%	23,290	3,262	14%	1,078	49%
Oakley	<u>2,689</u>	<u>362</u>	<u>13%</u>	<u>4,638</u>	<u>587</u>	<u>13%</u>	<u>225</u>	<u>62%</u>
Subtotal	98,306	21,385	22%	111,631	21,073	19%	(312)	-1%

[1] Includes manufacturing, wholesale trade, transportation and warehousing, administrative support / waste management and remediation, and utilities jobs.

[2] Represents all jobs in the NWED area and adjacent incorporated portions of Hercules, Martinez, Concord, Pittsburg, Antioch, and Oakley.

[3] Corresponds to Contra Costa County's northern waterfront area north of SR-4, including both incorporated and unincorporated areas.

[4] Includes data for cities within the NWED plus salient and adjacent unincorporated areas. Excludes Martinez and sub-markets to the west (potential for negligible overlap between Pacheco and Concord)

[5] The Tesoro (Marathon) Refinery site is included in both the Pacheco and Concord sub-market areas. It was active in 2002 was idled and shutdown in 2020 and is being converted from the processing of crude oil to the processing of renewable feedstocks.

Source: U.S. Census Bureau, "OnTheMap," <https://onthemap.ces.census.gov>, accessed during October and November 2025.

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Other salient conditions and trends in the northern waterfront's employment profile relative to the regional economy are highlighted below.

- Industrial jobs in Contra Costa County grew by about nine percent during the 20-year period compared to six percent for the Bay Area as a whole. Meanwhile, neighboring Alameda County has seen higher industrial growth: this sector currently represents about 29 percent of total jobs and grew by about 13 percent from 2002 through 2022.
- The industrial sectors in the NWED Area experienced relatively strong job growth over the 2002 through 2022 period at 20 percent, outpacing regional trends but still below job growth for all sectors in the total Bay Area employment at 26 percent. That said, job growth in the five NWED sub-markets examined varied significantly, with Antioch and Oakley leading the way and other areas experiencing industrial job losses. Further details on each sub-market are provided below.

3. *Workforce and Commute Trends*

The size and qualifications of the local workforce are important indicators of a region's competitive position. While employers often seek to locate in areas that have a sufficient supply of qualified workers within an efficient commuting distance, this is not always possible. Indeed, labor shortages have become an increasing challenge throughout the Bay Area where the cost of housing makes it difficult for medium to lower paid workers to afford to live. This section examines these dynamics in the Northern Waterfront based on several inter-related data points, including labor force attributes, the ratio of jobs to workers, and commute trends.

Table 2 compares trends in the Northern Waterfront workforce growth to job ratios between 2002 and 2022 against regional benchmarks. While the Bay Area's workforce grew modestly over the last two decades, it has not kept pace with job growth (21 percent to 26 percent growth, respectively). This means that, overall, the region must import workers, including in industrial sectors. Specifically, as of 2022, the ratio of total workers to jobs in the Bay Area was approximately .91 (i.e., about nine workers for every 10 jobs). This modest imbalance that masks significant differences within the nine-county region and has led to increased commute times, as described further below.

Meanwhile, Contra Costa County and NWED+6 have exhibited pronounced trends in the opposite direction – significantly more workers than jobs –a circumstance that is even more acute for industrial sectors. For example, the ratio of industrial workers to industrial jobs in Contra Costa County and NWED+6 area stands at about 1.68 and 1.67, respectively (the ratio is 1.38 for all workers to jobs), meaning that there are over 1.6 workers for every industrial job, and both geographies export substantial industrial workers to other regions. About 17,000 resident industrial workers from NWED+6 commuted to other job locations in 2022.

TABLE 2 NWED, REGIONAL, AND SUB-MARKET RESIDENT INDUSTRIAL WORKFORCE -TO-JOB RATIO 2002-2022

Location	2002 Employed Residents			2022 Employed Residents			Ratio: Ind. Workforce to Ind. Jobs		2002 - 22 Growth in industrial Workers	
	All Employed Residents	Industrial Workers ¹	Industrial as % of total	All Employed Residents	Industrial Workers ¹	Industrial as % of total	2002	2022	Amount	% Change
Regional / Sub-Regional Overview										
ABAG Region	3,042,299	781,281	26%	3,683,386	809,378	22%	0.93	0.91	28,097	4%
Alameda County	666,403	183,496	28%	801,985	186,001	23%	0.89	0.80	2,505	1%
Solano County	147,749	34,479	23%	203,417	44,783	22%	1.38	1.72	10,304	30%
Contra Costa County	430,362	91,515	21%	523,668	101,811	19%	1.64	1.68	10,296	11%
NWED +6²	181,615	39,529	22%	210,716	42,310	20%	1.74	1.67	2,781	7%
NWED Area³	65,057	14,357	22%	71,796	15,039	21%	1.05	0.92	682	5%
Selected NWED Sub-markets⁴										
Pacheco Mfg. Zone ⁵	549	106	19%	382	71	19%	0.03	0.04	(35)	-33%
Concord (SSA) ⁵	57,704	12,048	21%	58,601	10,733	18%	1.01	0.89	(1,315)	-11%
Pittsburg-Bay Point	32,628	7,209	22%	41,971	8,759	21%	2.02	2.67	1,550	22%
Antioch	42,222	9,790	23%	50,288	10,897	22%	4.48	3.34	1,107	11%
Oakley	<u>12,123</u>	<u>2,873</u>	<u>24%</u>	<u>20,066</u>	<u>4,330</u>	<u>22%</u>	<u>7.94</u>	<u>7.38</u>	<u>1,457</u>	<u>51%</u>
Subtotal	145,226	32,026	22%	171,308	34,790	20%	1.50	1.65	2,764	9%

[1] Includes manufacturing, wholesale trade, transportation and warehousing, waste management and remediation, and utilities jobs.

[2] Represents all workers employed in the NWED area and adjacent incorporated portions of Hercules, Martinez, Concord, Pittsburg, Antioch, and Oakley.

[3] Corresponds to Contra Costa County's northern waterfront area north of SR-4, including both incorporated and unincorporated areas.

[4] Includes data for cities within the NWED plus salient and adjacent unincorporated areas. Excludes Martinez and sub-markets to the west (potential for negligible overlap between Pacheco and Concord)

[5] The Tesoro (Marathon) Refinery active in 2002 was idled and shutdown in 2020 and is being converted from the processing of crude oil to the processing of renewable feedstocks.

Source: U.S. Census Bureau, "OnTheMap," <https://onthemap.ces.census.gov>, accessed during October and November 2025.

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By comparison, in neighboring Alameda County, the ratio of resident industrial workers to industrial jobs has decreased due to relatively fast industrial job growth. Alameda County has a ratio of 0.80 resident industrial workers for each local industrial job, resulting in a net estimated shortfall of about 47,900 industrial workers in 2022. All of this suggests Contra Costa County has potential to employ more of its resident workforce locally if such jobs were available.

Worker to job trends directly impact local and regional commute patterns. As illustrated in **Table 3**, travel distances for both NWED+6 employed residents and workers have increased significantly over the last 20 years. For example, the proportion of NWED+6 residents with commutes longer than 50 miles increased from about 8 percent in 2002 to 12 percent in 2022, while employed residents with commute distances less than 10 miles declined from about 36 percent to 29 percent during the same period. Meanwhile, commute distances for NWED+6 workers increased even more dramatically during the same period (greater than 50 miles up from 10 percent to 15 percent and less than 10 miles down from 47 percent to 39 percent). People who live in NWED+6 jurisdictions are driving farther to get to jobs, and workers who are employed in NWED+6 are driving into the area from farther away.

Individual NWED sub-markets exhibit important differences in terms of workforce to job ratios. For example, the NWED and NWED+6 both experienced small improvements in worker to job balances. Likewise, the western Pacheco Manufacturing Zone and the Concord SSA have more jobs than residents, whereas the more eastern Pittsburg-Bay Point, Antioch, and Oakley sub-markets send more of their resident workforce to other locations. These internal dynamics often reflect localized land use and regulatory factors (e.g., zoning) as much if not more than economic fundamentals. Specific NWED sub-market differences are discussed further in subsequent sections.

INDUSTRIAL LANDS RECOMMENDATIONS MEMO**TABLE 3 NWED +6 LOCAL WORKER AND RESIDENT WORKFORCE COMMUTE TIMES 2002 AND 2022**

Commute Distance	Commute Patterns of NWED +6 Workers ¹				Commute Patterns of NWED +6 Residents ²			
	2002		2022		2002		2022	
	#	%	#	%	#	%	#	%
Less than 10 miles	56,343	47.3%	54,272	38.6%	65,942	36.3%	61,636	29.3%
10 - 24 miles	33,911	28.5%	40,321	28.6%	58,954	32.5%	64,675	30.7%
24 - 50 miles	17,570	14.7%	23,812	16.9%	42,611	23.5%	58,514	27.8%
50+ miles	<u>11,307</u>	<u>9.5%</u>	<u>22,363</u>	<u>15.9%</u>	<u>14,108</u>	<u>7.8%</u>	<u>25,891</u>	<u>12.3%</u>
Total	119,131	100.0%	140,768	100.0%	181,615	100.0%	210,716	100.0%

[1] Represents all workers employed in the NWED area and the incorporated portions of Hercules, Martinez, Concord, Pittsburg, Antioch, and Oakley.

[2] Represents all employed residents living in in the NWED area and the incorporated portions of Hercules, Martinez, Concord, Pittsburg, Antioch, and Oakley.

Source: U.S. Census Bureau, "OnTheMap," <https://onthemap.ces.census.gov>, accessed during October and November 2025.

4. Industrial Real Estate Trends

The market profile for industrial real estate sectors reflects the physical manifestation of the economic conditions described in previous sections. Accordingly, this section evaluates industrial real estate performance metrics within the NWED sub-markets —existing inventory, average lease rates, vacancy rates, 5-year net absorption, and 5-year net deliveries — to further document the area’s competitive attributes and locational differences as viewed by tenants and developers. Again, due to limitations on the availability of geographically-specific real estate market data, this section focuses on four major NWED sub-markets that include industrial space in the PPAs as well as the cities of Antioch, Concord, Pittsburg/Bay Point and Oakley (referred to as NWED+4).

Specific metrics examined include:

- **Inventory size** shows the scale of available industrial space and growth capacity.
- **Lease rates** reveal how much tenants’ value location, access, and building quality. Higher rates signal strong demand and desirable products.
- **Vacancy rates (2025 YTD)** indicate immediate balance between supply and demand; low vacancies reflect tightness and pricing power, while high vacancies warn of oversupply or weakening demand.

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- **5-year net absorption** measures actual occupied space growth. Positive absorption confirms sustained tenant demand.
- **5-year net deliveries** track new supply added; when deliveries consistently outpace absorption, upward pressure on vacancy and downward pressure on rents follow.

Comparing these metrics across the NWED+4 sub-markets, **Table 4** highlights relative strengths: a sub-market with large positive absorption, low vacancy, and higher rents typically enjoys superior access (port, rail, freeway), modern functional space, or clustering advantages, making it more competitive for logistics, manufacturing, and distribution users. Conversely, sub-markets with flat or negative absorption, elevated vacancies, and stagnant or falling rents often face constraints such as older stock, site remediation issues, or poorer connectivity, signaling higher risk or value-add opportunities. When combined with additional information like average parcel size, real estate market indicators provide insights into sub-market performance and help target where NWED-targeted industrial developers may be more likely to find suitable locations to develop.

- **Industrial Inventory:** Overall, Industrial properties in the NWED+4 sub-markets contain more than 20 million square feet of industrial space, representing approximately 10 percent of the East Bay total (Alameda and Contra Costa Counties). Warehouse and distribution space, often referred to as logistics, accounts for about 68 percent of the total, compared to almost 30 percent oriented towards manufacturing uses. A focus on logistics-related activity reflects the Northern Waterfront's rail, port, and freeway connections and lower land costs relative to other inner Bay Area markets.
- **Lease and Vacancy Rates:** The weighted average vacancy rate of about 5 percent for the NWED+4 sub-markets indicates generally strong demand-supply dynamics balance. California is currently averaging 6.5 to 7.5 percent vacancy rates, up from the years of sub-5-percent vacancies during and immediately after the COVID-19 pandemic. The weighted average lease rate for NWED+4 is about \$15.21 per square foot, compared to about \$16.30 for the East Bay as a whole.
- **Deliveries and Absorption:** Post-pandemic construction and absorption have contracted sharply due to high capital, construction material, and labor costs; tighter lending; tariff policy; economic uncertainty; and softening demand. While the NWED+4 sub-markets increased inventory by 8 percent over the last five years, this bump was almost entirely attributable to pre-leased space like the Amazon DF02 fulfillment Center in Oakley's Contra Costa Logistics Center. Speculative industrial development has fallen off almost entirely and some sub-markets, such as Antioch and Pittsburg-Bay Point, saw low or negative absorption due to aging inventory and attrition from relocations and downsizing.
- **Parcel Size:** Larger industrial parcels can provide strong investment and expansion opportunities for developers and end-users. The Northern Waterfront area benefits from relatively abundant land availability, albeit of varying developable quality. The average parcel size is about 10 acres in the NWED PPAs and about 4 acres within incorporated areas.

TABLE 4 INDUSTRIAL REAL ESTATE TRENDS FOR SELECTED NWED SUB-MARKETS

Description	Concord SSA ¹		Pittsburg – Bay Point		Antioch		Oakley ²		Total / Wgt. Avg.	
	Amount	%	Amount	%	Amount	%	Amount	%	Amount	%
<u>Industrial Square Feet by Category</u>										
Distribution	176,791	2%	0	0%	25,200	1%	1,400,000	66%	1,601,991	8%
Manufacturing	899,400	11%	4,100,000	55%	989,000	28%	98,200	5%	6,086,601	29%
Warehouse	6,537,288	81%	3,300,000	44%	2,200,000	63%	577,000	27%	12,614,290	60%
Other (Approximate)	<u>436,493</u>	<u>5%</u>	<u>61,000</u>	<u>1%</u>	<u>262,800</u>	<u>8%</u>	<u>41,800</u>	<u>2%</u>	<u>802,093</u>	<u>4%</u>
Total Industrial Square Feet (2025 YTD)	8,049,972	100%	7,460,870	100%	3,477,285	100%	2,117,130	100%	21,105,260	100%
% of Total	38%		35%		16%		10%		100%	
<u>Market Performance Indicators</u>										
Average Lease Rates	\$18.65		\$15.75		\$8.01		\$12.00		\$15.21	
Vacancy Rate (2025 YTD)	3.7%		7.5%		5.4%		0.1%		5.0%	
5-Year Net Absorption	2,822		39,871		-146,737		1,645,085		1,541,041	
Deliveries (5 year total)	144,645		0		0		1,646,735		1,791,380	
<u>Average Industrial Parcel Size³ in PPAs</u>										
	1-2 Acres, Northern and Western Concord PPAs 17 acres, Pacheco Mfg. Zone		22 acres, Pittsburg Northern Waterfront and Bay Point Industrial Sector PPAs		7 acres, Antioch Northern Waterfront Industrial Corridor PPA		11.5 acres, Oakley Employment Zone PPA		9.9 acres, for all PPAs in NWED +6 Area.	
<u>Average Industrial Parcel Size³ in Incorporated Areas</u>										
	1.5 acres		6.4 acres		5 acres		10.75 acres		4 acres	

[1] Concord SSA real estate information in this table includes some of the Pacheco Manufacturing Zone PPA

[2] Average of 2018-2020 rates used for Oakley, no more recent rent data available from CoStar.

[3] Average acreage based on 2024-2035 Assessor's parcel boundaries and land use coding.

Source: CoStar, Contra Costa County Assessor 2024-2025 parcel data, EPS

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4.1 NWED SUB-MARKET ECONOMIC AND REAL ESTATE DYNAMICS

While the conditions and trends described above provide important context for understanding competitive prospects in the Northern Waterfront overall, there are important differences between the five major industrial sub-markets reviewed in this report. The sub-markets exhibit graduated differences from west to east that affect their appeal to various industry clusters. This section describes sub-market variations in terms of their economic and industrial market performance and in relation to specific locational attributes. Again, this section uses specific geographic areas created by EPS to reflect the conditions in the PPAs, but the geographic boundaries do not match the PPA areas because relevant data is not available on the scale of the PPAs. Looking at data for larger areas allows examination of market inter-relationships.

- **Western NWED (Hercules, Martinez, Pacheco Manufacturing Zone, Concord):** This segment is closer to UC Berkeley, Lawrence Berkeley National Lab, and the emerging Tesla/advanced transportation corridor along I-680. This proximity is attractive to R&D-intensive manufacturing, clean-tech, and EV-supply-chain users. Industrial parcels in the Western NWED are relatively small, averaging 1-2 acres, so these western PPAs have limited appeal for large-scale distribution. Average building sizes are modest in comparison to the potential for the Pacheco Manufacturing Zone, where average industrial parcel size is about 17 acres.
- **Eastern NWED (Bay Point, Pittsburg, Antioch, Oakley):** This segment provides a more direct gateway to the Central Valley via SR-4 and SR-160, offering abundant lower-cost land, rail-served land, and significantly larger average parcel sizes. These attributes have greater potential to accommodate 500,000–1M+ square feet buildings for e-commerce, food/ag processing, cold storage and warehousing, and third-party logistics serving Northern/Central California populations, as well as developers seeking larger advanced industry sites.

4.1.1 PACHECO MANUFACTURING ZONE

CoStar coverage is not comprehensive for extensive unincorporated areas like the Pacheco Manufacturing Zone. Given difficulty in gathering industrial real estate data unique to the Pacheco Manufacturing Zone, the market size and performance indicators have been aggregated within the Concord SSA. County assessor records indicate approximately 2.3 million square feet of industrial space on 261 acres, and about 344 acres of vacant industrial parcels, though these figures may be reduced by wetlands and utility easements. Parcel sizes average 17 acres, but there are also many smaller 2- to 10-acre lots.

At 4,700 acres, the Pacheco Manufacturing Zone is geographically the largest NWED sub-market, spanning unincorporated Contra Costa along the Carquinez Strait within the spheres of influence of Martinez, Concord, and Pleasant Hill, and offering direct access to rail, pipelines, and marine terminals. That said, with only about 6,280 total jobs and 550 employed residents as of 2022, the zone represents a relatively small share of overall economic activity in the NWED sub-markets. As of 2022, the Pacheco Manufacturing Zone had roughly 1,850 industrial jobs, representing 41 percent of local employment, the highest share

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among sub-markets and more than double the NWED+6 average. However, only 48.9 percent of these jobs were filled by Contra Costa County residents, compared to 56 percent for the NWED area and 48.7 percent countywide.

The Tesoro (Marathon) Golden Eagle Refinery was idled in May 2020 during the COVID-19 fuel demand decline and later converted to a Marathon Biofuels facility, which began production in 2023 and currently operates on about 40 percent of the 850-acre site. The conversion reduced operating employment, making Pacheco the only sub-market to experience declines in both total and industrial jobs between 2002 and 2022. The former Tesoro Refinery site is adjacent to the Martinez waterfront industrial corridor and near I-680. The part of the site not occupied by the Marathon Biofuels facility represents a prime redevelopment opportunity.

With proximity to UC Berkeley, Lawrence Berkeley National Lab, and the Tesla/advanced transportation corridor, combined with rail and roadway access, competitive lease rates, and relatively larger parcel sizes, the Pacheco Manufacturing Zone is well-suited for Advanced Manufacturing, Biomedical/Biotech, and Clean Tech clusters. Key challenges include brownfield remediation and flood and sea-level rise risks.

4.1.2 CONCORD SSA

The Concord SSA sub-market encompasses the City of Concord, including the Northern and Western Concord PPAs (the real estate data also includes the Pacheco Manufacturing Zone PPA). The Concord SSA currently has the largest industrial sector in the NWED +4 market (over 8 million square feet or 38 percent of the total), as well as highest lease rates and below average vacancy rates, driven by specialized, high-value advanced manufacturing tenants willing to pay premiums for smaller and more modern facilities. Excluding the Pacheco Manufacturing Zone, the Concord SSA has the smallest average industrial parcel size among all sub-markets, around 1.5 acres.

Along with the adjacent Pacheco Manufacturing Zone, the Concord SSA is one of only two sub-markets with a surplus of jobs relative to its resident workforce. In 2022, the Concord SSA had approximately 62,860 total jobs compared to 58,600 total employed residents, resulting in a modest net worker inflow of about 7 percent. Industrial employment in Concord SSA totaled about 12,090 jobs, or 19 percent of local employment: below the average for the Bay Area as a whole (22 percent) and NWED (24 percent), but close to the 18 percent share for the broader NWED+6 area.

The above attributes position the Concord SSA well for Advanced Manufacturing and Advanced Transportation Technologies, particularly firms seeking smaller lots and facilities as automation reduces on-site labor needs. Key challenges include lengthy permitting and CEQA review, and aging utility infrastructure.

4.1.3 PITTSBURG-BAY POINT

Pittsburg–Bay Point is second behind the Concord SSA among the four NWED jurisdictions in terms of the size of its industrial sector at about 7.5 million square feet, or 35 percent of the total. Additionally, as shown in Table 4, it is the only NWED sub-market to have a preponderance of manufacturing space rather

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than logistics space. Industrial employment totaled roughly 3,280 jobs, or 20 percent of local employment.

Strategically located between the Central Valley, Antioch's AMPORTS terminal, and the I-680 advanced transportation corridor, the Bay Point area offers strong rail, roadway, and Delta waterway access, moderate lease rates, and large industrial parcels averaging 22 acres. These attributes align well with Food & Beverage Processing, cold storage, and Advanced Transportation Technologies.

Incorporated Pittsburg, with parcels averaging 6.4 acres citywide and 22 acres in its Northern Waterfront PPA, provides municipal services and is well suited for Advanced Manufacturing and Clean Tech clusters. Key challenges include SR-4 congestion, limited rail grade separations, aging power infrastructure, and flood and sea-level rise risks.

4.1.4 ANTIOCH

Antioch's industrial inventory is smaller than Concord and Pittsburg–Bay Point, with 3.48 million square feet of mostly older flex and light-industrial space. There have been minimal new deliveries, only 150,000 square feet over the past decade and none in the last five years. This, combined with softening of e-commerce and last-mile distribution, contributed to a five-year net negative absorption of –147,000 square feet. Antioch also maintains low average lease rates (about \$8.00 per square foot), compared to the other NWED +4 sub-markets.

The city benefits from proximity to PG&E's Gateway and Marsh Landing generating stations, which provide 2,250 MW of capacity, and from DTSC-listed brownfield sites that offer redevelopment opportunities for Clean Tech industries. Existing chemical-related operations, relatively low lease rates, and large parcel sizes position Antioch well for Advanced Manufacturing and Clean Tech clusters. Additionally, the new AMPORTS terminal and vehicle processing facility enhances Antioch's role as an emerging logistics gateway, particularly for Advanced Transportation and EV supply chains, complementing nearby facilities like the Contra Costa Logistics Center in Oakley. Challenges include flood risks and legacy contamination requiring CEQA review.

Industrial employment in Antioch totaled about 3,260 jobs (14 percent of local employment), in 2022 the second-lowest share among sub-markets and below the NWED average of 24 percent and NWED+6 average of 18 percent.

4.1.5 OAKLEY

Oakley has the smallest employment base and industrial inventory among the five examined sub-markets. However, about 78 percent of the City's industrial inventory represents newly delivered space absorbed within the last 5 years by pre-leased uses such as the large Amazon fulfillment and sortation centers in Oakley's Contra Costa Logistics Center Complex. With most of its industrial inventory new and pre-leased, Oakley currently has a very low vacancy rate (0.1percent) and below average lease rates (about \$12.00 per square foot), compared to higher lease rates in the sub-markets west of Antioch. While the City

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recorded only 4,640 total jobs as of 2022 (and only 13 percent in industrial sectors) this number likely increased since 2022 from additional development.

Oakley's proximity to the Central Valley, multimodal access to rail, roadways, and Delta waterways, competitive industrial lease rates, and large average parcel size (11.5 acres) make it well suited for Food & Beverage Processing and related warehousing uses such as cold storage. The Contra Costa Logistics Center in Oakley complements nearby facilities like Antioch's AMPORTS terminal and vehicle processing hub. Challenges include farmland conversion constraints within the Oakley Employment Area PPA and uncertainty around tariff policies. Future tariffs on processed food could favor regional supply centers like Central Valley and potentially increase eligibility for Resilient Food Systems Infrastructure (RFSI) grants.

Industrial Lands Land Use Context Memo

This Memorandum is a review of land use, environmental, and social justice context for Priority Production Areas (PPA) in the Contra Costa County Northern Waterfront Economic Development area (NWED). This area is the focus of a Contra Costa County economic development initiative (NWEDI) to create 18,000 new jobs by 2035. The NWEDI leverages existing competitive advantages by focusing on five industry clusters: advanced transportation, advanced manufacturing, biomedical/biotech, agriculture technology & food processing, and clean technology.

As described by MTC, PPAs are “areas where clusters of industrial businesses can locate and be connected and well served by the region’s transportation network.” MTC requires that PPAs be:

- Zoned for industrial use or have predominantly industrial uses.
- Located outside Priority Development Areas and other areas within walking distance of a major rail commute hub.
- Located in jurisdictions with a certified housing element.

Land use and development information in this Memo is primarily informed by an [online inventory](#) of industrial lands in and around the seven NWED PPAs. The online inventory is an ongoing effort developed as part of the East Bay PPA Technical Assistance project. The PPAs include:

1. **Pacheco Manufacturing Zone.** This 4,700-acre PPA in unincorporated Contra Costa County is largest PPA in the NWED. It is located northeast of the intersection of Interstate 680 (I-680) and State Route 4 (SR 4), north of the City of Concord and east of the City of Martinez. It includes an eastward “extension” along Contra Costa Canal that forms an approximately 100-acre bulb of land. The PPA is bisected by the Burlington Northern and Santa Fe (BNSF) and Union Pacific (UP) railways and includes the Buchanan Field regional airport.
2. **Northern Concord PPA.** This 495-acre PPA includes two discontinuous areas in the City of Concord, both that share borders with the Pacheco Manufacturing Zone PPA. One area is located immediately north of SR 4 and the other is immediately south of SR 4.
3. **Western Concord PPA.** This relatively small PPA includes two discontinuous areas in the City of Concord that total about 112 acres. The larger area is located south of Monument Boulevard immediately west of the BART right-of-way. The smaller area is immediately east of the BART right-of-way.
4. **Baypoint Industrial Sector.** This 188-acre PPA is in unincorporated Contra Costa, within the City of Pittsburg Sphere of Influence (SOI). It is about 0.5 miles north of SR 4 and 7.5 miles east of I-680, directly south of the BNSF and UP railways.

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5. **Northern Waterfront.** This 1,243-acre PPA is in northeastern Pittsburg, north of SR 4 and east of Downtown Pittsburg. The BNSF railway runs through the northern part of the PPA, and the UP railway runs through the southern part.
6. **Northern Waterfront Industrial Corridor.** Most of this 1,027-acre PPA is in the north/northeastern areas of the City of Antioch. The far northeastern corner of the PPA is in unincorporated Contra Costa but within Antioch's SOI. The PPA is about a mile north of SR 4 and a half-mile north of the UP railway.
7. **Oakley Employment Area.** This 758-acre PPA is in the northwest corner of the City of Oakley. It is immediately adjacent to the Northern Waterfront Industrial Corridor, just over a half mile north of SR 4. The BNSF railway bisects the middle of the PPA.

This Memo includes summaries and analyses of the following four topics for each PPA:

1. Land Use and Development
2. Natural Hazards and Environmental Risk
3. Environmental Justice

1.1 RELATIONSHIP TO THE CONTRA COSTA GREEN EMPOWERMENT ZONE

The [Green Empowerment Zone](#) (GEZ) is a designated economic development initiative that aims to drive a transition to clean energy manufacturing and related industries in California's Bay Area. It is primarily focused on the Northern Waterfront area of Contra Costa County and extends to parts of Solano County. Geographically, the GEZ encompasses all seven PPA's in the NWED area. It extends beyond the PPAs to include all of Brentwood, El Cerrito, Hercules, Oakley, Pinole, Richmond, San Pablo, the Byron Airport and adjoining unincorporated land in Contra Costa County; and Vallejo, Benicia and adjoining unincorporated land in southern Solano County.

Per California Government Code Section 7599.100, the purpose of the GEZ is to build upon the comparative advantages provided by the regional concentration of highly skilled energy industry workers by prioritizing access to tax incentives, grants, loan programs, workforce training programs, and private sector investment in the renewable energy sector.

The primary duties of the GEZ are as follows:

- Identify projects and programs that leverage federal, state, local, and private sector resources to support the development of the clean energy economy in the Northern Waterfront area.
- Work with members of the state's congressional delegation and relevant federal interagency task forces, to gain federal support for projects identified by the GEZ as critical to the region's energy economy.
- Partner with the University of California, other research and educational institutions, and private foundations to provide guidance and support of studies significant to the energy industry in the Northern Waterfront area.

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- Review state policies and regulations to ensure they benefit the state's diverse geographic regions, including the Northern Waterfront area, and assess the need for more efficient alternative approaches.
- Make recommendations to the Governor that would improve the economic well-being of the region and the quality of life of its residents.
- Create and maintain an internet website that is managed and updated by an entity designated by the GEZ board of directors.

The GEZ can help advance a subset of NWEDI goals, particularly in sustainable economic revitalization. Both the GEZ and NWEDI address the Northern Waterfront area and emphasize job creation, workforce development, and growth of clean manufacturing in an area with disadvantaged communities historically burdened by the fossil fuel industry. Where the NWEDI provides a broad strategy that covers five industry clusters, of which clean tech is one, the GEZ focuses on clean energy only. However, the clean energy policy and regulatory recommendations made by GEZ will cover the entire NWED area (as well as areas outside the Northern Waterfront and Contra Costa County). As such, the work of the two efforts will overlap, particularly regarding areas of the NWED impacted by traditional industry.

1.2 LAND USE AND DEVELOPMENT

The following section is a review of industrial land use policies and development patterns in each PPA.

1.2.1 PACHECO MANUFACTURING ZONE

This PPA exemplifies the benefits and challenges of a large, well-resourced waterfront industrial zone. It is dominated by heavy industrial land use policy and a legacy of ownership by major industrial employers. It is located in unincorporated Contra Costa County and the Sphere of Influence of the City of Concord.

General Plan Land Use Designations

This PPA is dominated by three Contra Costa County land use designations: the south-central area is designated HI (Heavy Industry); surrounding areas to the east are designated LI (Light Industry); and the area north of the BNSF railway and SR 4 (including Buchanan Field Airport) is primarily designated PS (Public and Semi-Public).

Industrial Zoning Districts

This section describes current zoning as of 2025. Contra Costa County is currently undertaking a comprehensive Zoning Code Update to bring zoning into consistency with General Plan 2040, which was adopted in 2024. The Zoning Code Update may result in zoning changes to reflect the current General Plan land use designations.

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- Over 80 percent of the land in this 4,700-acre PPA is zoned for industrial land use by Contra Costa County. Most is zoned H-I (Heavy Industrial). H-I zoning covers the entire central area, extending from the SR 4 boundary in the north to San Pablo Bay.
- L-I (Light Industrial). A group of large (up to 180 acres) L-I parcels is located at the eastern boundary of the PPA, and a group of smaller (under 10 acres) L-I parcels is located at the western boundary, forming a business park.
- C-M (Controlled Manufacturing). A small area southwest of the intersection of I-680 and SR 4, near the community of Pacheco, is zoned C-M.

However, the City of Concord will also have an opportunity to comment on proposed projects because the PPA is within Concord's Sphere of Influence (SOI).

Non-Industrial Zoning Districts

Exceptions to industrial zoning are limited. They include two pockets of P-1 (Planned Unit) zoning on the western edge of the PPA and one P-1 area in the "bulb" of land at the eastern extension. In addition, a small extension of the PPA on the far west side includes a mix of C (General Commercial), R-B (Retail Business) and N-B (Neighborhood Business) districts.

Existing Industrial Use

Industrial land use in the PPA is characterized by heavy industry on large parcels in the central PPA. This includes multiple refinery-oriented uses surrounding Solano Way, from SR 4 to the waterfront. Most of these parcels are owned and utilized by petroleum company Tesoro Refining & Marketing Company (Tesoro). Others are owned by Continental Carbonic Products, Marathon Petroleum and Monsanto. Existing light industrial business park uses are generally located in smaller areas in the western and southern parts of the PPA.

Vacant Parcels

Vacant or unimproved parcels include the following groups:

- H-I Parcels. A cluster of H-I parcels west of the central area of existing heavy industry is currently vacant. The smallest of these is less than 5 acres and the largest is about 55 acres.
- P-I Parcel. An 80-acre parcel zoned P-1 is located on the west side of the PPA. It includes both Residential Medium Density and Resource Conservation general plan land use designations.
- L-I Parcels. A group of vacant L-I parcels is located east of existing industrial uses along Solano Way. The largest of these is 245 acres. According to the County Assessor, most of these large parcels are owned by Tesoro.

Non-Industrial Uses

Some industrially zoned land in the PPA is occupied by non-industrial uses. A group of parcels totaling about 270 acres zoned H-I is utilized by a public wastewater treatment plant. Another group of parcels

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zoned L-I and totaling about 110 acres is developed with a series of recreational fields. Buchanan Field Airport is zoned Public-Semi-Public.

Residential uses abut the PPA. A single-family neighborhood (zoned R-7) is located between I-680 and the western boundary of the PPA. Another single-family neighborhood (zoned R-6) is located in Clyde, immediately east of the PPA boundary.

1.2.2 NORTHERN CONCORD

The Northern Concord PPA is adjacent to the Pacheco Manufacturing Zone to the north and east. It is within the City of Concord and includes light industrial buildings, resulting in the potential for diverse industrial uses beyond the heavy industry that defines the Pacheco Manufacturing Zone.

This small, slim PPA is adjacent to the Pacheco Manufacturing Zone PPA. However, its location in Concord, its business park-oriented zoning and its distance from the waterfront result in a very different context.

General Plan Land Use Designations

The entire PPA is designated Business Park (BP) by the City of Concord. Light industrial and warehouse uses are allowed under the BP designation.

Industrial Zoning Districts

Zoning is consistent with BP general plan land use. The entire PPA is zoned Office Business Park (OBP) by the City of Concord, except for a group of parcels zoned Industrial Business Park (IBP).

Non-Industrial Zoning Districts

One parcel in the northern corner of the PPA is associated with Mallard Reservoir and is zoned Public/Quasi-Public (PQP). It is owned by the Contra Costa Water District.

Existing Industrial Use

Most of the parcels within the PPA are occupied by small to medium-sized light industrial, warehousing, manufacturing or storage uses. All parcels are less than 15 acres, with most between 1 to 5 acres. A review of County Assessor data shows that most are privately owned. There are also some governmental tenants such as Central Contra Costa Transit.

Vacant Parcels

There are no vacant or unimproved parcels in this PPA.

Non-Industrial Uses

Some two- to four-acre parcels zoned IBP are not occupied by industrial uses. They are mainly in the northeastern portion of the PPA. There are no residential uses within PPA. However, there are residential

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uses near the PPA: These include low and medium residential neighborhoods south of SR-4 and directly east of the southern part of the PPA, as well as Clyde to the northeast of the PPA.

1.2.3 WESTERN CONCORD

The Western Concord PPA is the smallest of the seven NWED PPAs and is geographically isolated from the others by its location furthest to the south. The PPA is composed of two small islands of industrial land uses.

General Plan Land Use Designations

Most of the PPA has a City of Concord General Plan land use designation of Business Park (BP). A group of parcels at the far western end, west of Pine Creek, is designated Industrial Mixed Use (IMU).

Industrial Zoning Districts

The southern portion of the southern “island” of this PPA, about half the total land area of the PPA, is zoned Industrial Mixed Use (IMX) in the south. These parcels are between 0.5 and 3 acres in size.

Non-Industrial Zoning Districts

Approximately half of the PPA, including the entire northern “island” is zoned Office Business Park (OBP).

Existing Industrial Use

Most of the parcels with IBP and IMX zoning have current industrial use. Per the County Assessor, most of these parcels appear to be privately owned and include paint companies and metal suppliers. In the northern section of the PPA, the only existing industrial use is an 8.3-acre parcel owned and utilized by an aerospace company.

Vacant Parcels

There are no vacant or unimproved parcels in this PPA.

Non-Industrial Uses

Only about 4 parcels zoned IBP and IMX do not have industrial uses. These are 1-to-2-acre parcels with commercial uses. While there are no residential uses in the PPA, Single Family Residential (RS) and Residential, Medium Density (RM) districts surround portions of both PPA “islands.” Ygnacio Valley Elementary School is also directly outside of the southwest corner of the PPA.

1.2.4 BAYPOINT INDUSTRIAL SECTOR

At less than 200 acres total, this is one of the smallest of the seven PPAs. The PPA is unique in that it is within Contra Costa County’s Bay Point Area-Wide Planned Unit Development (P-1) area. This P-1 area was

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previously a Contra Costa County redevelopment area, with standalone land use maps and development standards.

As noted in Section 1.2.1, Contra Costa County is currently undertaking a comprehensive Zoning Code Update that will likely result in zoning changes to unincorporated land.

General Plan Land Use Designations

All parcels in this PPA have an industrial land use designation under the Contra Costa County General Plan. Most parcels are designated LI (Light Industrial). One 25-acre parcel in the southeast portion of the PPA is designated HI (Heavy Industrial).

Industrial Zoning Districts

All the parcels in this PPA are designated Heavy Industry (H-I) within the County's Bay Point Area-Wide P-1 district. Per the P-1 ordinance land use matrix, various agricultural, commercial, manufacturing and animal uses are allowed in H-I parcels. The P-1 ordinance includes design guidelines for industrial uses that target building scale; adequate visual screening; use of high-quality, well-integrated building materials; and sensitivity to street frontages and adjacent residential uses.

While the P-1 zoning designation allows for flexibility and creativity in development proposals, it also requires a discretionary process rather than allowing industrial or other uses by right. This can make the development review process lengthier and less predictable. The entire PPA is in unincorporated Contra Costa County, and any development would be approved by the County. However, the City of Pittsburg will also have an opportunity to comment on proposed projects because the PPA is within Pittsburg's Sphere of Influence (SOI).

Non-Industrial Zoning

As noted, all parcels in the PPA are designated Heavy Industry (H-I) by the Bay Point P-1 ordinance.

Existing Industrial Uses

Currently three parcels have existing industrial uses:

- The 25-acre parcel designated for H-I; until recently, this property was used by Shell Catalysts and Technologies, but the company has recently left the site, and the buildings are currently vacant.
- A 30.6-acre parcel north of the Shell property used by IAA East Bay.
- A 12.5-acre parcel on the western edge of the PPA owned by Signode Industrial Group.

Vacant Parcels

There are three vacant or unimproved parcels in the PPA that are all zoned LI:

- An 11.5-acre parcel in the northwest corner of the PPA,
- A 32.4-acre parcel in the center of the PPA, and

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- A 75.6-acre parcel spanning the full PPA from north to south in the center of the PPA. The southern approximately 20 percent of the parcel is outside of the PPA.

Non-Industrial Uses

The Bay Point P-1 area includes land immediately south, west and east of the PPA designated for single family and multiple family uses. As such, while there are no residential uses within the PPA, a residential neighborhood surrounding Lynbrook Park is directly outside of the PPA boundary.

1.2.5 NORTHERN WATERFRONT

This 1,243-acre PPA is the only PPA in the City of Pittsburg. Existing land uses are consistent with industrial land use policies and large parcel sizes.

General Plan Land Use Designations

Most of the parcels in this PPA are designated Industrial in the City of Pittsburg General Plan. A few parcels along the west and south boundaries of the PPA are designated Employment Center Industrial. Land designated as Open Space bisects the eastern part of the PPA. A 15-acre parcel in the southeast corner of the PPA, owned by the Delta Diablo Sanitation District, is designated Utility/ROW.

Industrial Zoning Districts

All parcels in this PPA are zoned for industrial use by the City of Pittsburg. Most parcels are zoned General Industrial; a group of parcels in the southwest corner of the PPA as a Limited Industrial-Limited Overlay.

Non-Industrial Zoning

As described above, all parcels are zoned for industrial.

Existing Industrial Uses

Industrial land use in the PPA is characterized by heavy industry uses on parcels mostly in the central PPA and along the western side. Most of the western parcels ranging from 5 acres to 184 acres are owned by USS-Posco Industries, which operates a steel mill. A 240-acre parcel in the northeast corner of the PPA as well as several smaller parcels are owned by Corteva Agriscience, manufacturing agricultural products like seeds and herbicides. Others are owned by Union Carbide Industrial Gases, Pittsburg Industrial Park LLC, and other investment companies.

Vacant Parcels

Limited vacant or unimproved parcels are scattered throughout the PPA. They range in size from 2 acres to 72 acres. Most are zoned General Industrial. Two parcels, totaling 13 acres, are zoned Limited Industrial-Limited Overlay. Most of the vacant parcels are not adjacent to each other.

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Non-Industrial Uses

As noted, a 15-acre parcel in the southeast corner of the PPA is owned by the Delta Diablo Sanitation District. North of that is a 20-acre parcel owned by Calpine and used as the Delta Energy Center. Contra Costa Waste Service owns property in the center of the PPA used as a recycling center and power plant control. There are no residential uses within or immediately adjacent to the PPA.

1.2.6 NORTHERN WATERFRONT INDUSTRIAL CORRIDOR

This PPA is the second largest of the seven PPAs. It is directly adjacent to the Oakley Employment Area PPA, described in the following section. Most of the PPA is in the City of Antioch, although the marina parcels on the eastern end of the PPA, just west of Highway 160, are in unincorporated Contra Costa County and within Antioch's Sphere of Influence.

General Pan Land Use Designations

Nearly the entire PPA is composed of the City of Antioch Eastern Waterfront Employment Focus Area. According to the Antioch General Plan, the purpose of this designation is to "...plan for revitalization of former heavy industrial lands along the [San Joaquin] river, including transition to other uses."

The portion of the PPA in unincorporated Contra Costa County, totaling under 100 acres, includes a mix of Heavy Industry (HI) Light Industry (LI) and Commercial Recreation (CR) land use designations, the latter associated with Antioch Marina.

Industrial Zoning Districts

The northern half of this PPA, between BNSF railway and the waterfront, is zoned either Industrial by the City of Antioch, or H-I by Contra Costa County.

Non-Industrial Zoning

Parcels not zoned for industrial use are largely south of the BNSF railway and include:

- Commercial. There is a large cluster of commercial zoning in the southern part of the PPA that is separated by a Special/Study District mostly outside of the PPA.
- Open Space. Separating some of the commercial parcels are two clusters of land zoned as open space totaling approximately 38 acres.
- Planned Development. There is a cluster of land zoned for Planned Development in the southernmost part of the PPA ranging in size from 0.5 acres to 7 acres adjacent to a larger Planned Development area outside of the PPA. An 11-acre stand-alone parcel separates the only two parcels zoned as Industrial south of the BNSF Railway.
- Special/Study District. A 4-acre parcel zoned as Special/Study District is within the PPA adjacent to a larger Special/Study District area.

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Existing Industrial Use

Industrial land use in the PPA is characterized by light industry and marina uses. The largest parcels are in the central PPA, adjacent to Wilbur Avenue or the BNSF Railway, with smaller parcels along the PPA's boundary. The largest are owned by Georgia-Pacific Gypsum LLC, a building projects manufacturer; Antioch Terminal, owned by Amports; Kiewit Construction Group, the Contra Costa Generating Station owned by BB Antioch LLC, and OneSource Supply Solutions. Most parcels are separated by vacant parcels, and many of those that own property in this PPA only own a single parcel.

Vacant Parcels

Vacant or unimproved parcels are generally clustered in two areas. Four parcels totaling approximately six acres are on the western side of the PPA south of Wilbur Avenue. All are zoned Commercial. A larger cluster on the eastern side of the PPA totals approximately 50 acres. The northern portion of that cluster is zoned Industrial.

Non-Industrial Uses

A significant quantity of industrially zoned land in the PPA is neither occupied by industrial use nor vacant. Most industrial uses are north of Wilbur Avenue. They include a gymnastics facility, professional design services, various churches, restaurants and a cemetery. A 30-acre parcel is used for agriculture. Other parcels are used for energy production. There are no residential uses within the PPA, but a large residential area is adjacent to the southwest of the PPA.

1.2.7 OAKLEY EMPLOYMENT AREA

The Oakley Employment Area PPA is in the City of Oakley, immediately east of the Northern Waterfront Industrial Corridor. It includes a greater mix of land use than the other PPAs.

General Plan Land Use Designations

At the northern end of the PPA is a small cluster of parcels designated Commercial Recreation or Delta Recreation. Between these parcels and the BNSF railway is a large area designated either Light Industrial or Business Park in the City of Oakley General Plan. Further south, just south of Main Street, land use designation shifts to Commercial, with pockets of Multi-family Low and Multi-Family High to the east. Finally, land use designations shift back to Light Industrial on the far southern side of the PPA, north of Oakley Road.

Industrial Zoning Districts

Industrial zoning does not define this PPA. It includes just two districts defined as "Industrial" in the Oakley Municipal Code: Most of the southern portion is zoned Light Industrial (LI), and two small areas on the western edge of the PPA are zoned Utility Energy District (UE).

Less than 30 percent of the land in this 758-acre PPA is zoned for industrial land use by the City of Oakley. The majority of the industrial zoning in this PPA is LI (Light Industrial) which is entirely clustered between

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Main Street and Oakley Road in the southern part of the PPA. A 4.6-acre cluster of parcels is zoned UE (Utility Energy District) along the western boundary of the PPA, north of BNSF Railway.

Non-Industrial Zoning

The most prevalent zoning district in the PPA is Planned Unit Development (P-1). One large P-1 area is associated with the central area of Light Industrial general plan land use. The second area of P-1 zoning is located south of Main Street, an area with an underlining General Plan land use designation of Multi-Family Low. Other non-industrial zoning districts include:

- Commercial. A variety of commercial development is scattered throughout the PPA, most south of Main Street. Some land in the north and east, adjacent to Big Break Shoreline, is zoned Commercial Recreation-Aquatic (CR-A).
- Residential. Different residential districts are in the southern part of the PPA including a large cluster of Multi-Family Residential (M-17) and one parcel zoned Single-Family Residential (R-6).
- Specific Plan. There are two groups of land zoned for Specific Plans. In the northern portion of the PPA adjacent to the eastern boundary is SP-3 (Pending). Between Main Street and BNSF Railway is River Oaks Crossing Specific Plan (SP-2).
- Public. Three parcels near Main Street are zoned Public and Semi-Public (P).

Existing Industrial Use

Industrial land use in the PPA is characterized by storage and logistics related uses. The largest parcels are clustered in the P-1 zone north of BNSF Railway and are used as fulfillment and shipping facilities by Amazon and Pet Food Express. A smaller cluster of parcels, south of Main Street, are used for storage on both the Commercial and Light Industrial land. A single, 0.9-acre parcel on Light Industrial land west of Neroly Road is an auto repair company.

Vacant Parcels

Vacant or unimproved parcels include the following groups:

- LI Parcel. A 4.6-acre parcel zoned LI is located adjacent to other LI, commercial, and residential land along Lice Oak Avenue.
- P-1 Parcel. A 1.7-acre parcel, adjacent to land zoned UE, north of BNSF Railway, has a General Plan land use designation of Light Industrial.
- Commercial Parcels. Most vacant or unimproved parcels are on land zoned C. These are scattered in the southern part of the PPA in four clusters. Most include just a single parcel and are around 2 to 3 acres. One 0.6-acre parcel is zoned Retail Business (RB).
- P Parcel. A 6.0-acre parcel zoned as Public and Semi-Public is the middle of the light industrial land adjacent to commercial land.
- DR Parcel. A sliver of a larger parcel is in the eastern part of the PPA, zoned DR, and adjacent to BPL and residential land.

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Non-Industrial Uses

Most industrially zoned land in the PPA is neither occupied by industrial use nor vacant and is being used for agriculture. Some of this land is adjacent to residential uses within the PPA, as well as a school in the parcel zoned Public and Semi-Public. Most of the eastern boundary of the PPA is directly adjacent to residential uses.

1.2.8 LAND USE CONSIDERATIONS

1.3 NATURAL HAZARDS AND ENVIRONMENTAL RISK

The seven NWED PPAs are generally located in flat, low-lying areas fronting San Pablo Bay fed by multiple creeks. As a result, one or more are susceptible to inundation risks, including sea level rise, flood hazards and liquefaction. Due to the same hydrological and topographical conditions, the PPAs are generally not susceptible to fire, landslide or other risks.

Sea level rise cannot be fully addressed on a site-by-site basis. Contra Costa County is currently at work on a Resilient Shoreline Plan that will coordinate with regional efforts and will address the County's entire 90-mile Bay and Delta shoreline, including the NWED. Information about this ongoing effort is available at <https://www.contracosta.ca.gov/9981/Contra-Costa-Resilient-Shoreline-Plan>.

As noted in the introduction to this Memo, industrial zoning and active industrial uses are key criteria in the nomination of PPAs. As such, PPAs are unlikely to include protected or sensitive lands. In the NWED, sensitive environments and open spaces are mostly limited to surrounding lands of various State, City and special districts designation.

1.3.1 PACHECO MANUFACTURING ZONE

Natural Hazards

This PPA has the highest risk of sea level rise of all seven PPAs. The northern and central industrial lands along Walnut Creek may be impacted by inundation from two to 10 feet in depth. In addition to potential development challenges, inundation may result in the uplift of coastal groundwater. In an area with a legacy of heavy industry, this groundwater rise can also facilitate the spread of contaminated soils.

Flood hazard areas are also prominent in this PPA. Most of the northern and central industrial lands are within the FEMA 100-year flood hazard zone. Smaller pockets are within the 500-year flood hazard zone. It follows that much of the PPA is classified as low to moderate liquefaction susceptibility. Four to five small pockets, most located outside industrial districts, are classified as having very high liquefaction susceptibility.

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Seismic Hazards

The north-south trending Concord-Green Valley Fault and surrounding Alquist-Priolo Fault Hazard Zone run directly through this PPA, east of I-680. The entire PPA has a United States Geological Survey (USGS) Earthquake Shaking Hazard Threat of “Severe Shaking.” As such, new development would have to comply with Surface Mining and Geology Board (SMGB) and Seismic Hazards Mapping Act (SHMA) regulations, including preparation of fault investigation reports. The Contra Costa County General Plan also includes policies to reduce impacts of development near areas with known faults:

- **Policy HS-P11.1** requires geotechnical reports for all sites in areas of known or suspected seismic or other geologic hazards with effective mitigation measures incorporated into the project design.
- **Policy HS-P11.3** discourages construction of critical facilities and buildings in Alquist-Priolo Fault Zones, encourages earthquake retrofitting, and requires critical facilities and buildings to be sited, designed, and constructed to withstand seismic stresses.

Protected and Sensitive Land

State-designated Point Edith Wildlife Area is located adjacent to the PPA to the east, along the waterfront.

1.3.2 NORTHERN CONCORD PPA

Natural Hazards

Two areas of the PPA are within the FEMA 100-year flood hazard zone, one area in the northern portion of the PPA near Mallard Reservoir and one area along Walnut Creek. The eastern area of the northern PPA, and almost all of the southern PPA, have low to moderate liquefaction susceptibility.

Seismic Hazards

The north-south trending Concord-Green Valley Fault and surrounding Alquist-Priolo Fault Hazard Zone run adjacent to the southern section of the PPA and directly through the southern portion of the southern section. Additionally, the entire PPA has an Earthquake Shaking Hazard Threat of “Severe Shaking” per the United States Geological Survey’s Probabilistic Seismic Hazard Assessment.

Protected and Sensitive Land

A 5.4-acre parcel, partially in the southern part of the PPA, includes the Via Delta de Anza Trail. It is owned by the City of Concord and managed by the East Bay Regional Parks District. The entire southern area of the PPA abuts the Walnut Creek corridor, zoned Open Space (OS) by the City of Concord.

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1.3.3 WESTERN CONCORD

Natural Hazards

Only a sliver of the northwest corner of the PPA, adjacent to Galindo Creek, is in a FEMA 100-year and 500-year flood hazard zone. The PPA is not at risk of sea level rise inundation. Nearly the entire PPA is classified as having low to moderate liquefaction susceptibility.

Seismic Hazards

The north-south trending Concord-Green Valley Fault and surrounding Alquist-Priolo Fault Hazard Zone runs through the PPA. Additionally, the entire PPA has an Earthquake Shaking Hazard Threat of “Severe Shaking” per the USGS.

Protected and Sensitive Land

There is no protected or sensitive land within the PPA. Rick Sears Park, owned by the City of Concord, is directly west of the southern section of the PPA.

1.3.4 BAYPOINT INDUSTRIAL SECTOR

Natural Hazards

Flood hazards affect in the northwestern part of the PPA. Due to its waterfront location, most of this area is in 100-year flood zone, with smaller areas in the 500-year flood zone. An approximately quarter-mile span of the northern boundary of the PPA is within the 0-2-foot-deep sea level rise inundation zone. A small section within that area may reach depths of 3-4 feet. Most of the PPA has low liquefaction susceptibility with areas of moderate susceptibility running north south through the PPA. The northwest corner of the PPA is in a mostly moderate susceptibility area.

Seismic Hazards

The entire PPA is an area of has an Earthquake Shaking Hazard Threat of “Severe shaking.” There are no active faults in this PPA.

Protected and Sensitive Lands

There are no protected or sensitive lands within the PPA.

1.3.5 NORTHERN WATERFRONT

Natural Hazards

Flood hazard areas are prominent in this PPA. FEMA 100-year and 500-year flood hazard zones are distributed along the waterfront, through the center of the PPA, and along the eastern side. However, there is no threat of sea level rise inundation. Most of the PPA has a low susceptibility to liquefaction,

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except along the northern boundary which is high to very high. On the eastern side, the high susceptibility area extends south beyond the BNSF railway.

Seismic Hazards

There are no mapped seismic hazards or active faults in this PPA area. It is classified by the USGS as having a “Severe shaking” threat.

Protected and Sensitive Lands

A small portion of Pittsburg’s Central Park is in the southwest corner of the PPA. Pittsburg’s Columbia Linear Park borders the PPA to the southwest.

1.3.6 NORTHERN WATERFRONT INDUSTRIAL CORRIDOR

Natural Hazards

Flood hazards are prominent in the northern area of the PPA. FEMA 100-year and 500-year flood hazard zones are focused along the waterfront, with a larger section of 500-year flood zone, all within industrial zoned parcels. However, there is not a threat of sea level rise inundation in this PPA. Nearly the entire PPA is classified as moderate liquefaction susceptibility. There are a few pockets of the PPA, all in industrial zones, that have a high susceptibility to liquefaction. The northeast corner has a very high susceptibility to liquefaction.

The PPA is not on land within a moderate, high, or very high fire hazard severity zone nor is the PPA in a USGS landslide area.

Seismic Hazards

There are no mapped faults or faults hazards in this PPA. A small area in the northeast corner of the PPA is classified as having a “Severe Shaking” threat.

Protected and Sensitive Lands

Most of the Antioch Dunes National Wildlife Refuge, owned by the United States Fish and Wildlife Service, is located immediately outside the PPA to the north. Sixty-eight acres of the refuge are within the PPA. As noted by the Antioch General Plan, “[t]he environmental sensitivity and fragility of the Antioch Dunes National Wildlife Refuge within the northwestern portion of [the City of Antioch Eastern Waterfront Employment] Focus area establishes the need to provide appropriate buffer areas for urban uses located adjacent to the Refuge.” The Gaylord Sports Park is a 28-acre parcel owned by the City of Antioch in the southern area of the PPA.

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1.3.7 OAKLEY EMPLOYMENT AREA

Natural Hazards

There are two pockets of land in the FEMA 100-year flood hazard zone both along the northern boundary in the east and west corners. However, there is not a threat of sea level rise inundation in this PPA. Nearly the entire PPA is classified as moderate liquefaction susceptibility. A small area along the northern boundary has a high to very high susceptibility to liquefaction, with only a tiny portion in industrial uses.

The PPA is not on land within a moderate, high, or very high fire hazard severity zone nor is the PPA in a USGS landslide area.

Seismic Hazards

There are no mapped seismic hazards in this PPA.

Protected and Sensitive Lands

A very small area of East Bay Regional Park District's Big Break Regional Shoreline is along the eastern portion of the PPA. The rest of the 1,658-acre park is adjacent to the PPA.

1.4 ENVIRONMENTAL JUSTICE POLICY

Low-income communities and communities of color in Contra Costa County and elsewhere have experienced a combination of historical discrimination and disempowerment. Many of these communities remain concentrated in neighborhoods where they face a disproportionate burden of pollution and threats to their livelihood. The following section summarizes the location of these communities within the PPAs and highlights associated policies and development.

The following three indicators are included in this assessment:

1. **SB 1000 Impacted Communities.** California Senate Bill (SB) 1000 requires that general plans address environmental justice and respond to inequity by alleviating pollution and health impacts and compelling cities and counties to include the voices of previously marginalized residents in planning decisions. The Contra Costa County 2045 General Plan mapped "Impacted Communities" using the California Communities Environmental Health Screening Tool (CalEnviroScreen). This tool measures pollution and population characteristics using 21 indicators, such as air quality, hazardous waste sites and asthma rates. The 2045 General Plan includes the following actions and policies to regulate future development in and near Impacted Communities:
 - o **Action SC-A1.3.** With input from residents of Impacted Communities, amend County Ordinance Code Title 8 – Zoning to create an Impacted Communities Overlay Zone that applies to areas within and adjacent to Impacted Communities. Heavy industrial projects and commercial and light industrial projects resulting in 25,000 square feet or more of gross habitable floor area within the overlay zone will be required to satisfy additional

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discretionary permit findings that promote environmental justice, health, safety, and economic prosperity.

- **Policy SC-P6.1.** Ensure that future improvements in Impacted Communities will not result in a net loss of affordable housing or significant preventable displacement of residents.
 - **Action HS-A1.4.** Consult with BAAQMD and community stakeholders and amend County Ordinance Code Title 7 – Building Regulations to include a clean construction ordinance that requires projects to implement extra measures to reduce emissions at construction sites in or near places that are already overburdened by air pollution, such as Impacted Communities.
 - **Policy HS-P9.7.** Prioritize implementation of projects that reduce the risk of hazardous materials transportation accidents along hazardous material transportation corridors in Impacted Communities.
 - **Policy HS-P9.9.** Deny entitlements for construction of new large-scale facilities that treat, store, or dispose of hazardous waste from off-site sources and negatively impact Impacted Communities.
2. **MTC Equity Priority Communities (EPCs).** These are census tracts in the Bay Area that are classified as underserved by MTC based on a formula of demographic characteristics. The primary characteristic is that more than 28% of households in a census tract are low-income (earning less than 200% of the federal poverty level). MTC's Lifeline funding program directs funding to projects recommended in Community-Based Transportation Plans (CBTPS), which are outreach-intensive plans to improve mobility and equity in EPCs.
3. **Federal Opportunity Zones.** Opportunity Zones (OZs) are economically distressed census tracts that satisfy the Internal Revenue Code definition of "low-income community." This definition includes census tracts with a poverty rate of at least 20 percent, or a median family income that does not exceed 80 percent of the statewide median. The OZ program was created under the Tax Cuts and Jobs Act of 2017. It provides tax incentives designed to spur economic development and job creation in these underserved areas, through preferential tax treatment for those investing capital gains into the areas.

1.4.1 PACHECO MANUFACTURING ZONE

Environmental justice issues in this PPA are primarily associated with heavy manufacturing and associated environmental liabilities.

- **Impacted Communities.** The majority of the PPA contains census tracts classified as SB 1000 Impacted Communities.
- **Equity Priority Communities.** The PPA does not contain Equity Priority Communities.
- **Federal Opportunity Zones.** The PPA does not contain Federal Opportunity Zones.

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1.4.2 NORTHERN CONCORD

- **Impacted Communities.** This PPA is in Concord. As such, it contains no Contra Costa County Impacted Communities.
- **Equity Priority Communities.** The PPA does not contain Equity Priority Communities.
- **Federal Opportunity Zones.** The PPA does not contain Federal Opportunity Zones.

1.4.3 WESTERN CONCORD

- **Impacted Communities.** This PPA is in Concord. As such, it contains no Contra Costa County Impacted Communities.
- **Equity Priority Communities.** The PPA does not contain Equity Priority Communities. However, the census tract immediately west of the PPA, across San Miguel Road, is an EPC.
- **Federal Opportunity Zones.** The larger, southern “island” of this PPA is located in an OZ that extends from Monument Boulevard in the north to Treat Boulevard in the south. The southern portion of the northern PPA “island” is also within this OZ. The City could maximize the benefits of the OZ by providing information to commercial brokers clearly identifying the OZ and explaining its benefits.

1.4.4 BAYPOINT INDUSTRIAL SECTOR

- **Impacted Communities.** The PPA is entirely within an SB 1000 Impacted Community.
- **Equity Priority Communities.** The census tract is an MTC EPC. Per the US Census, about 54 percent of the community is Low-Income, and nearly 90 percent is composed of People of Color. Twenty-six percent of households are Single-Parent households.
- **Opportunity Zones.** The census tract is a federal Opportunity Zone.

1.4.5 NORTHERN WATERFRONT

- **Impacted Communities.** This PPA is in Pittsburg. As such, it contains no Contra Costa County Impacted Communities.
- **Equity Priority Communities.** The entire area of this PPA is within two MTC EPC census tracts. The population of one tract is 80 percent People of Color and 30 percent Low-Income. The population of the other tract is 70 percent People of Color and 50 percent Low-Income.
- **Federal Opportunity Zones.** A very limited area of the PPA north of East 14th Street is in an OZ.

1.4.6 NORTHERN WATERFRONT INDUSTRIAL CORRIDOR

- **Impacted Communities.** This PPA is in Pittsburg. As such, it contains no Contra Costa County Impacted Communities.

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- **Equity Priority Communities.** Nearly the entire PPA is in a single MTC EPC census tract. The population is 61 percent People of Color and 33 percent Low-Income. In addition, about 85 percent of the EPC is over 75 years of age.
- **Federal Opportunity Zones.** Nearly the entire PPA is in an OZ that covers much of northern Antioch.

1.4.7 OAKLEY EMPLOYMENT AREA

- **Impacted Communities.** This PPA is in Pittsburg. As such, it contains no Contra Costa County Impacted Communities.
- **Equity Priority Communities.** The northern half of this PPA is in an EPC. The population of the EPC is 56 percent People of Color and 48 percent Low-Income.
- **Federal Opportunity Zones.** Only a limited area on the western boundary of this PPA is within the OZ that covers most of the Northern Waterfront Corridor PPA.

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