



Northern Waterfront Priority Production Areas Contra Costa County

Economic Development Committee

August 17, 2026



Agenda

- Priority Production Areas (PPAs) in Contra Costa County
- Northern Waterfront Status Update
- Infrastructure Capacity Insights
- Pacific Gas & Electric (PG&E) Input
- Upcoming Work

Priority Production Areas (PPAs) in Contra Costa County

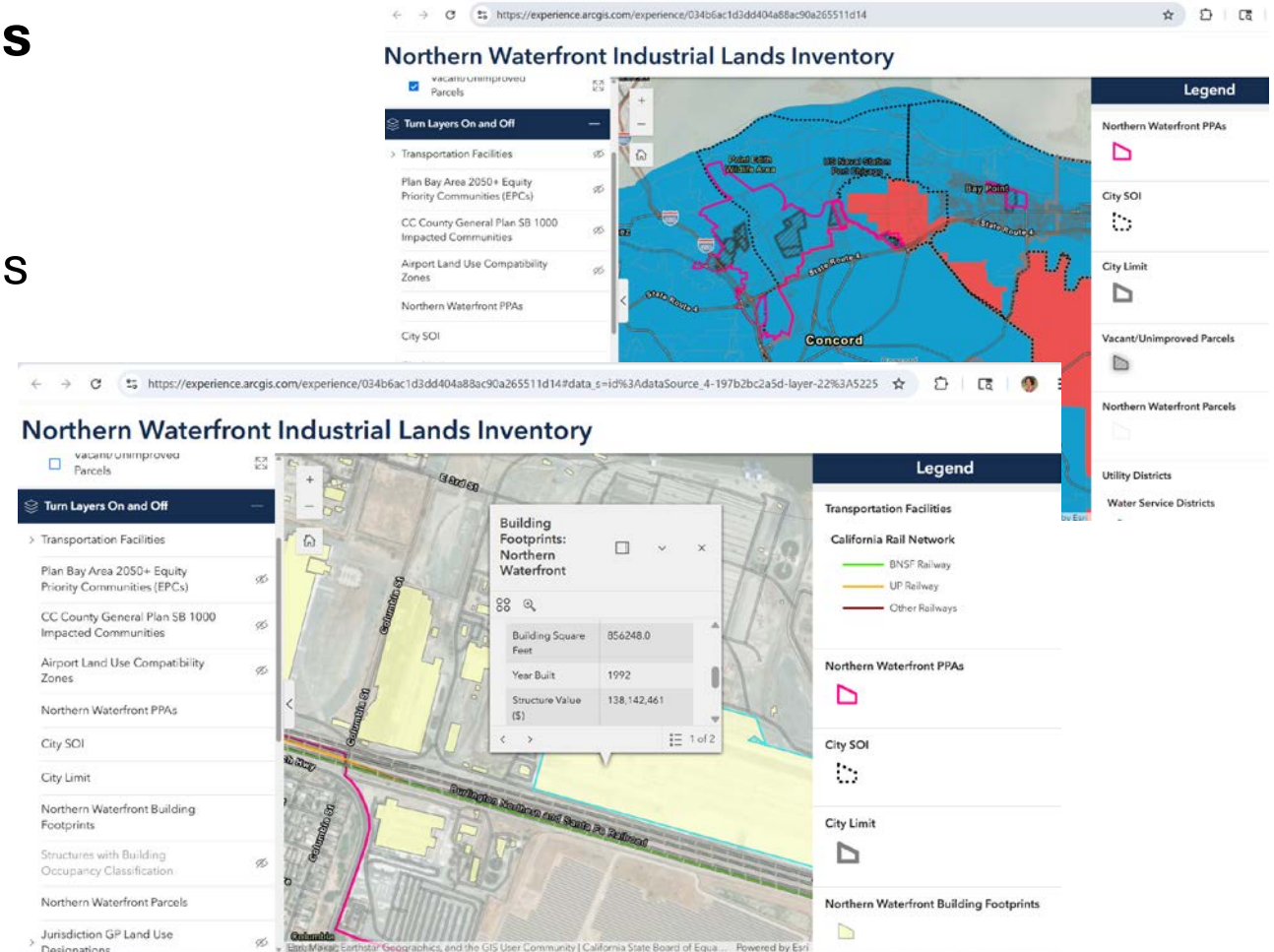
- 7 Northern Waterfront Economic Development PPAs
- Preserve areas that can add jobs and support economic growth
- Nominated by the Board of Supervisors or City Council



Northern Waterfront Status Update – Prior Work Products

October 6, 2025 – Prior Work Products

- Online inventory of industrial land
 - Industrial General Plan, zoning, uses
 - Building footprints
 - Transportation facilities
 - Equity Priority Communities
 - County's Impacted Communities
 - Federal Opportunity Zones
 - Utility districts
 - Protected lands & hazards



Northern Waterfront Status Update – Current Work Products

Current Work Products

- Economic & Market Insights
 - Employment, workforce, real estate & market trends
 - Priority Production Area regional & sub-market analyses
- Infrastructure Capacity Analysis
 - Water, sewer, storm drainage, roadways, power, communications
- Transportation/Goods Movement Analysis
 - Vehicle volumes and truck trips at 11 intersections and 28 segments
 - Rail, maritime, truck capacity analyses
- Northern Waterfront Economic Development Initiative Update Analysis
 - Ongoing interview & outreach process

Infrastructure Insights: Sewer, Water, Storm Drainage, Power

- Provider plans typically accommodate planned growth, not unanticipated users
- Legacy of incremental expansion based on site-specific upgrade evaluations
- Roadways not designed for new volumes and high-intensity uses
- Variability in communication carriers' fiber and network designs

Key Challenge: Power Capacity

- Many modern manufacturing users are “large load” (20+ Megawatt)
- Most PPA sites w/out required capacity; upgrades require early coordination with PG&E + studies = 2+ years total
- Developers hesitant to act w/out adequate power; power difficult to procure without project-specific information
- Result is “industrial development bottleneck”

PG&E's Economic Development Team (EDT)

- PG&E wants to maximize “excess capacity” in Northern Waterfront Economic Development Area
 - New loads spread fixed costs, resulting lower rates
 - 1 new GW can reduce bills by 1%
- This is primary role of new EDT
 - Follows success in San Jose
 - Focus on strategic, not incremental growth
 - Speed up procurement process
 - Early growth planning with jurisdictions
- Continued reliance on complex customer upgrade process
 - Location of other utilities
 - Land rights
 - Existing easements
 - Physical conditions
 - Local policies
- PG&E network upgrades require approval by the California Public Utilities Commission through a once-yearly process

Upcoming Work

1. Complete Analyses & Recommendations for Northern Waterfront Economic Development Initiative Update
 - Update core industry clusters
 - Evaluate market & workforce conditions
 - Complete sites analyses supported by industrial land inventory
2. Initiate Economic Road Map
 - Develop definitions & classifications for target industries
3. Develop Priority Production Area tools & templates for local staff
 - Instructions for setting up financing tools
 - Development regulations to support job growth while protecting communities