

Logistics Sprawl: Differential Warehousing Development Patterns in Los Angeles, California, and Seattle, Washington

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1 Logistics Sprawl: Differential Warehousing Development Patterns in Los Angeles and Seattle

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36 ABSTRACT

37 The warehousing industry experienced a period of rapid growth from 1998 to 2009. This paper compares 38 how the geographic distribution of warehouses changed in both the Los Angeles and Seattle Metropolitan 39 Areas over that time period. These two west coast cities were chosen due to their geographic spread and proximity to major ports as well as their difference in size. The phenomenon of logistics sprawl, or the 40 41 movement of logistics facilities away from urban centers, which has been demonstrated in past research 42 for the Atlanta and Paris regions, is examined for these two areas. The weighted geometric center of warehousing establishments was calculated for both areas for both years, along with the change in the 43 44 average distance of warehouses to that center, an indicator of sprawl. We find that between 1998 and 45 2009, warehousing in Los Angeles sprawled considerably, with the average distance increasing from 25.91 to 31.96 miles, an increase of over 6 miles. However in Seattle, the region remained relatively 46 stable, showing a slight decrease in average distance from the geographic center. Possible explanations 47 48 for this difference are discussed.

50 INTRODUCTION

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52 Starting in the 1990¢ the logistics industry began experiencing rapid growth. This was reflected by 53 warehousing specifically, which for the purposes of this paper is defined as any industry falling under North American Industry Classification System (NAICS) Code 493 ó Warehousing and Storage. This 54 55 includes general, refrigerated, farm product, and other warehousing and storage. (Code 493 has kept the 56 same definition over our study period, eliminating possible bias in comparing different years). Across the United States, employment in the warehousing industry increased by almost 400% between 1998 and 57 58 2006 at a compound annual growth rate of 22.25%, compared to total U.S. employment which grew by 59 1.3% annually (1). The number of warehousing establishments more than doubled from 6,712 in 1998 to 60 over 14,000 by 2008 (2). The trend continued until the recession, at which point the growth in the 61 warehousing industry began to slow. The number of warehousing establishments increased every year through 2007, at which point there was a 1% decrease in establishments in 2008. From 2008 to 2011 the 62 number of establishments decreased at an average of 0.4% per year. Similarly the number of 63 warehousing employees increased every year through 2008, at which point there was a 4% decrease in 64 65 warehousing employment by 2009, and a further 3% decrease in 2010, before increasing less than a percent in 2011 (3). This paper will compare the locations of warehouses in two major population centers 66 67 on the west coast ó Los Angeles and Seattle, during the growth period. These two cities can be compared 68 to Atlanta, for which a similar analysis was completed in Dablanc and Ross (2012) (4).

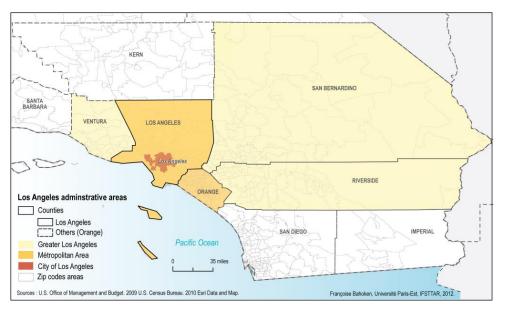
Specifically, this paper will focus on a phenomenon known as logistics sprawl, which is the
tendency of warehouses to move away from urban regions toward more suburban and exurban areas (4).
Dablanc and Ross show this phenomenon to be occurring in the Atlanta area, which has a metropolitan
population of approximately 5.5 million people (5).

The Seattle area studied is smaller than Atlantaøs, with a population of 3.5 million, while the Greater Los Angeles area is much larger at approximately 18 million (5). Both Seattle and Los Angeles are located next to the Pacific Ocean, and house major intermodal terminals, including the 1st and 3rd largest container terminal complexes in the United States, respectively. This creates demand for warehouses in the nearby area. Geographic features such as the Pacific and mountain ranges constrain both regions geographically (but in diverse ways), influencing urban expansion patterns.

The LA area used in this study (commonly referred to as the Greater Los Angeles area) includes
Ventura, Los Angeles, Orange, San Bernardino, and Riverside counties, shown in Figure 1. Los Angeles
is bordered to the southwest by the Pacific Ocean, and is separated from much of northern LA and San

82 Bernardino counties by the San Gabriel Mountains to the north. There are also several smaller mountain

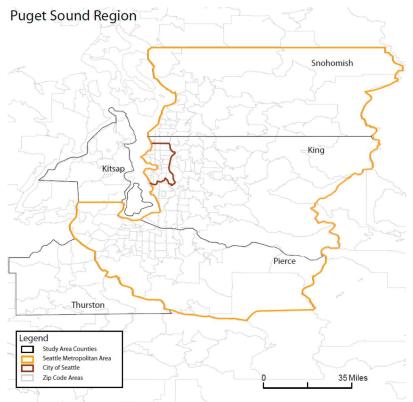
ranges in the area, recent expansion of both population and industry has been largely to the east.



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FIGURE 1 Los Angeles study area.

88 The Seattle-area counties studied were King, Snohomish, Pierce, Kitsap, and Thurston, stretching 89 from Everett in the north to Olympia in the south, shown in **Figure 2**. The Puget Sound provides a 90 geographic barrier to the west, and the Cascade Mountains border the east side of the urban region. There 91 are a few residential and industrial areas to the west of the Sound, but most of the population and 92 businesses are to its east. Transportation across the Sound is difficult as there is only one road crossing 93 the body of water in the southern end and all other travel must be made by ferry. The vast majority of the 94 population lives to the east of the water.



95 96 FIGURE 1 Seattle study area (Source: U.S. Census Bureau). 97

98 The Los Angeles Metropolitan Area economy grew from approximately \$578 billion in real gross 99 domestic product (GDP) in 2001 to \$653 billion in 2009, a total growth of approximately 13% (6). The highest yearly GDP during that time period was \$692 billion in 2008, which decreased by 5.6% in 2009. 100 Major sectors in the Los Angeles economy include manufacturing, trade, and banking and finance. 101 Transportation and warehousing comprise about 2.4% of total GDP (6). 102

The Seattle Metropolitan Area economy grew from approximately \$173 billion real GDP in 2001 103 104 to \$204 billion by 2009, a growth of approximately 18% (6). The highest yearly GDP during that time period was \$211 million in 2008, which decreased by 3.3% in 2009. Major sectors include aerospace, 105 information technology, trade, and tourism (7). Transportation and warehousing comprise about 2.9% of 106 107 total GDP (6).

Trade is a major industry in both metropolitan areas. Transportation and warehousing make up a 108 109 similar percentage of total GDP in both areas (2.4 and 2.9%). Most sectors in both regions experienced moderate growth until 2008 before declining due to the recession. However the Los Angeles 110 111 Metropolitan Area experienced a greater percentage decline in GDP from 2008 to 2009.

LITERATURE REVIEW 113

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Sivitadinou (1996) made one of the first empirical studies of the location of warehouses in a U.S. 115

metropolitan area (Los Angeles) and examined its links with land prices (8), but her efforts were not 116

117 followed by many others. õUrban economists have traditionally focused on the labor decisions of firms

118 and households to try and account for various aspects of urban form. The location and transportation

decisions made by the various entities in the supply chain as these parties manage logistics costs have 119

received considerably less attentionö (9), while they have become increasingly more important, especially 120 in metropolitan areas. The warehousing industry has undergone major restructuring, transforming it into a

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122 distribution industry serving major importers and big box retailers (10, 11), based on direct access to

123 consumption markets, globalized networks of goods distribution, hub and spoke networks and just-intime operations. This has led to a rise in hub distribution centers (12). Very large distribution centers, or 124 õmega DCsö (1) have driven the early growth in warehousing establishments in metropolitan areas in the 125 study period. Between 1998 and 2005, the number of distribution centers with more than 100 employees 126 127 increased twice as fast as smaller facilities (1). Today supply chains require a lot of logistics facilities, and the efficiency of goods distribution depends upon the optimal location and sizing of freight terminals. 128 Freight transportation costs have decreased dramatically over the last thirty years (13). Low freight costs 129 130 create an õincreased locational flexibilityö (14) for freight and logistics facilities. The opportunity for good regional and national networking between facilities within a supply chain is a key factor (15). 131 132 Finally, some warehousing activities which were previously performed as part of a manufacturing or distribution activity (and on the same premises), have been outsourced to logistics providers, 133 134 automatically increasing the number of warehouses. In some cases manufacturers have implemented a specific warehousing/logistics facility when previously logistics functions (which required less space) 135 were performed within the manufacturing facility itself (see the example of Vernon, in Southern 136 California, presented in [16]). As noted by Hall and Hesse (2013), metropolitan areas retain logistics 137 facilities because they have a sort of õfreight advantageö that includes õlabour, skills, infrastructure, 138 139 technologyö among others (17).

140 The new distribution centers required by the current organization of supply chains and a 141 consumer-based economy are directly responsible for logistics sprawl, i.e. the tendency for warehouses to move from urban to suburban and exurban areas (4). Historically, warehouses and freight terminals have 142 tended to be close to city centers and rail stations. Today, they need more space and are located as close 143 as possible to highway networks and airports (18). Suburban areas are attractive because of the 144 145 availability and low cost of land and also because of the availability of transportation infrastructure that connects to a more complex system of regional and national flows. This has an impact on urban 146 147 landscapes by generating congestion, CO_2 emissions and local atmospheric pollution. These impacts are 148 the result of additional vehicle-miles travelled (VMT) generated by the increase in distances travelled by 149 trucks and vans to deliver commodities to urban areas where jobs and households remain concentrated. 150 Dablanc and Rakotonarivo (2010) calculated that cross-dock terminals for parcel and express transport companies moved an average of 6 miles further away from the center of Paris between 1975 and 2008 151 152 (19). During the same period, jobs in general moved only 1.3 miles, meaning that logistics sprawl is much 153 more prevalent than the general sprawl of economic activities in metropolitan areas. They estimated the 154 net increase in annual CO₂ emissions resulting from the relocation of facilities serving the Paris region to 155 be 16,500 tonnes in 2008 compared with 1974.

156 The issue of logistics sprawl has recently generated some discussion among scholars, particularly 157 economic geographers. Cidell (2010) has shown that in 47 of the 50 large metropolitan areas she surveyed, õdecentralizationö of freight activity had occurred over the last 20 years (1986-2005), as 158 159 measured via Gini coefficients (20). Because data were processed at the county level, however, it was 160 difficult to account for some of the relocation patterns, as central counties can be very widespread and changes in location within counties were not accounted for in Cidellø studies. Bowen (2008) confirms 161 162 that logistics activities have experienced enormous, largely unnoticed, growth in recent years (15). He 163 shows that the growth in warehousing was more marked in suburban counties than in central and rural 164 counties: central city Metropolitan Statistical Area (MSA) counties saw warehousing establishments grow at an annual growth rate of 10.2%, while the increase for non-MSA counties and other MSA counties 165 were respectively 9.3% and 11.8%. Hesse (2004), using two case studies from Germany, concludes that 166 logistics activities favor distant locations for many reasons, some of which are specific to this industry 167 while others apply to many economic sectors: overcoming congestion, planning requirements, or even the 168 169 influence of unions (21). Looking at the Inland Empire in Southern California, De Lara (2013) 170 emphasizes the role of temporary work availability and low-wage flexible workforce, demonstrating substantial wage differences in transportation and warehousing industries in L.A and Orange Counties 171 compared with Riverside and San Bernardino Counties (22). These changes are embedded in a general 172 173 transformation of the logistics real estate industry, increasingly dominated by global players organizing

174 large networks of distribution centers. Allen and Browne (2010) have found a tendency for warehousing to move away from urban areas to suburban areas in the United Kingdom and elsewhere in Europe. Land 175 prices in Europe have been steadily increasing recently, so they theorize that this move has occurred 176 partially due to cheaper land prices in suburban areas (23). The expansive roadway network in Europe 177 178 allows companies to construct large warehouses in more centralized locations. In England specifically, they have found that warehousing districts are often strategically clustered along motorways close to, but 179 180 just outside of large cities. While this is partly due to accessibility to the road network, it is also õa result of planning policy that encourages a concentration of such land useö (23). We will come back to land use 181 182 policies in the discussion of this paper. 183

184 **DATA**

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186 The research described in this paper was conducted using zip-code level establishment data. Data for all 187 establishments for the years 1998 and 2009 were downloaded from the County Business Patterns website

(http://www.census.gov/econ/cbp/). Structured query language (SQL) was used to isolate establishments

under NAICS code 493 specifically, and to aggregate establishment totals within a given region. The

final data sets were all zip codes in Ventura, Los Angeles, Orange, San Bernardino, and Riverside

191 counties in California and King, Pierce, Snohomish, Kitsap, and Thurston in Washington. ArcGIS

192 software was used to create maps of warehouse and establishment data. Additionally the barycenter, or

193 weighted geographic mean, was calculated and plotted for each region for each year using standard

194 ArcGIS procedures. These procedures are discussed further in the results section.

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196 LOS ANGELES RESULTS

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198 In 1998, the bulk of the warehousing establishments in the Los Angeles Metropolitan Area were located

in Southern Los Angeles County and east and south-east of downtown. Erreur ! Source du renvoi

200 introuvable. shows the locations of distribution centers in the Los Angeles study area in 1998, displayed

by zip code. The only zip code outside of LA County with more than 10 establishments is 91761 in

202 Ontario, CA, which has 16 facilities listed under NAICS code 493.

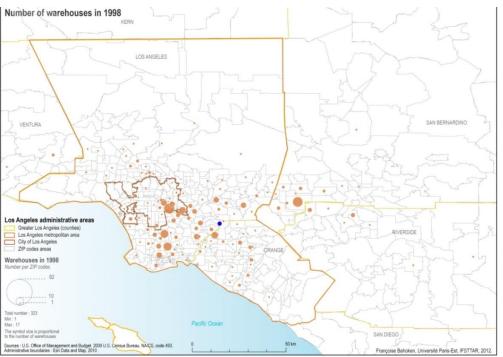
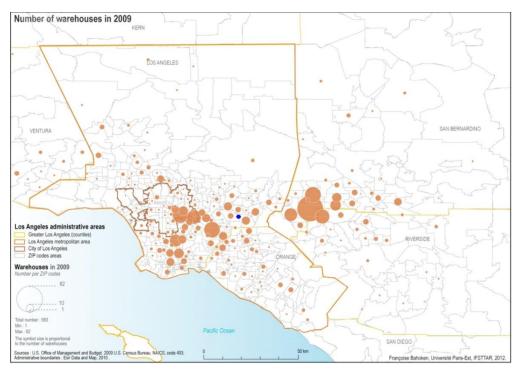


FIGURE 2 Los Angeles area warehousing, 1998. The weighted geographic center is indicated by a star.

By 2009, the warehousing industry had undergone a significant expansion, as shown in **Erreur ! Source** du renvoi introuvable., below. The total number of warehousing establishments increased substantially,

and two distinct concentrations of warehouses appeared ó one near the city of Los Angeles, and one
 around Ontario and zip code 91761.

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211 212

FIGURE 3 Los Angeles area warehousing, 2009. The weighted geographic center is indicated by a star.

There was moderate growth in both number of zip codes with warehousing establishments as well as total 214 215 establishments within the city limits, shown in Erreur ! Source du renvoi introuvable. and Erreur ! Source du renvoi introuvable.. Of zip codes with at least one establishment in 1998, 60 showed at least 216 217 100% increases in number of establishments. The number of establishments in Los Angeles County increased 134% from 220 in 1998 to 515 in 2009. Orange and Ventura counties experienced moderate 218 219 growth. The most striking increase, however, appeared in western San Bernardino and Riverside 220 counties, where in 1998 just one zip code had more than 10 establishments. As previously mentioned, this is centered around zip code 91761 in Ontario. The total establishments in San Bernardino County, 221 for example, increased 641% from just 34 establishments in 1998 to 252 in 2009. Zip code 91761 222 increased from 16 establishments in 1998 to 82 in 2009. Several of the zip codes in the surrounding area 223 224 also showed significant increases in number of establishments.

To quantify a potential shift in the location of warehousing establishments, a centrographic analysis of all establishments under NAICS code 493 was performed. The barycenter, or weighted geometric mean, of these was calculated for both years. The barycenter was weighted only by spatial distance; other warehouse characteristics, such as square footage or number of employees, were not included in the weighting. Then the distance from the barycenter to each establishment was calculated and averaged across all warehousing establishments. A similar analysis was done for all NAICS establishments. The findings can be summarized as follows:

- The average distance of warehousing establishments from their barycenter increased from 25.907 miles to 31.963 miles,
- but the average distance of all establishments from their barycenter remained stable, changing from 41.748 to 41.714 miles.
- 236 On the whole, there was very little change in distribution of all establishments, but warehousing has
- sprawled considerably. While establishments in the L.A. metropolitan area have not sprawled,
- warehouses have moved out an average of 6 miles. This suggests that within the L.A. metropolitan area,
- more truck miles are required to reach customers (for shipments or deliveries) in 2009 than was the case

in 1998. This is õrelative sprawl,ö i.e. when logistics facilities move further away than the businesses theyserve for pick-ups and deliveries.

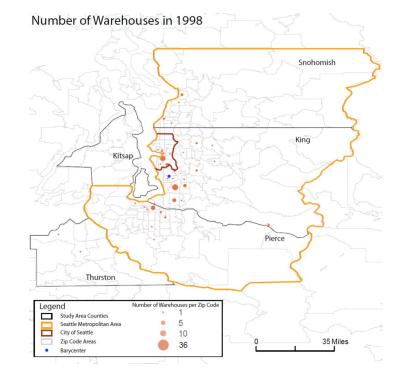
243 SEATTLE RESULTS

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244 245 In the Seattle area, the same sets of analyses were performed. The number of warehouses increased

- significantly within the study area, from 85 in 1998 to 212 in 2009, an increase of 149%. **Figures 5 and**
- **6** show the number of warehouses by zip code for these two years, respectively.
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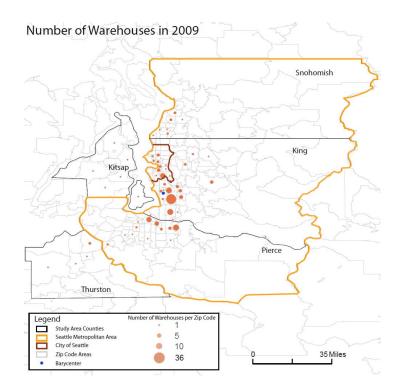


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251 FIGURE 4 Seattle area warehousing, 1998 (Source: U.S. Census County Business Patterns).

In 1998, zip code 98032 had the most establishments at 15, and zip code 98134 was the only other zip code with more than 7. There were 35 total zip codes with a warehousing establishment, and 85 total establishments in the area. All but 5 zip codes had 3 or fewer warehouses. There was nothing to the

west of the Puget Sound, and only two zip codes with establishments in the Olympia area. The barycenterwas plotted as a star.



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FIGURE 5 Seattle area warehousing, 2009 (Source: U.S. Census County Business Patterns).

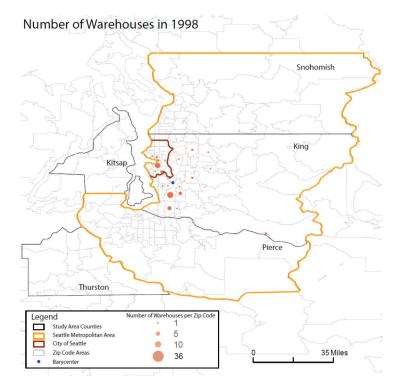
By 2009, however, the total number of establishments had increased to 212. The number of zip codes with at least one establishment increased 74% from 35 to 61. To the southwest, there are now 5 zip codes with establishments compared to two in 1998. Where there had previously been nothing to the west of the Puget Sound, there are now 7 zip codes with at least one warehouse. There are also more zip codes with more establishments to the north.

The bulk of the new warehouses were built in the Kent/Renton area. Zip code 98032 had a 140% increase in number of warehouses, from 15 warehousing establishments in 1998 to 36 in 2009. There

was a high concentration of warehouses near the barycenter in 1998, and additional warehouses were

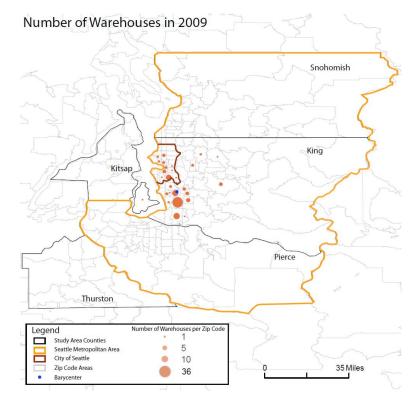
constructed in all of those zip codes by 2009. The barycenter shifted 2.27 miles to the southwest between1998 and 2009.

The analysis was repeated for only King County, where the city of Seattle is located, shown in **Figures 7 and 8**, below. It was found that the barycenter moved 1.01 miles to the southwest, and the average distance from the barycenter decreased almost 20%, from 8.5 to 7.1 miles.



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FIGURE 6 King County warehousing, 1998 (Source: U.S. Census County Business Patterns).



279 280 281

1 FIGURE 7 King County warehousing, 2009 (Source: U.S. Census County Business Patterns).

Similarly, the barycenter for all NAICS establishments in 1998 and 2009 was calculated. In this
 case, very little has changed other than growth in the total number of establishments. The barycenter
 moved 0.20 miles to the northeast.

As was completed with the Los Angeles data, the average distance of both warehouses and all establishments from their barycenter was calculated, with results as follows:

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- In 1998, the average distance of warehouses from the barycenter was 12.8 miles, which decreased slightly to 12.0 miles by 2009, and
- The average distance of all establishments from the barycenter was 16.3 miles in 1998, compared to 16.5 in 2009.

These numbers suggest establishments in the Puget Sound region have not sprawled significantly since 1998. Warehouses specifically may have even contracted spatially a small amount, however given the uncertainty of exact locations of warehouses within a zip code, we would conclude that the average distance remained relatively stable.

296 DISCUSSION AND DIRECTIONS FOR FUTURE RESEARCH

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298 Warehousing in the Los Angeles area has increased in two geographically distinct places ó in the 299 metropolitan center, both in the city and in LA County near the city, and much further from the city in 300 western Riverside and San Bernardino counties. The city of Los Angeles has long been a warehousing 301 hub because of its proximity to the San Pedro Bay Ports and has a long tradition of manufacturing 302 activities in various places including close to the Downtown area. However there is limited room for further expansion because it is so densely populated and the size of land parcels is limited. Further east in 303 Riverside and San Bernardino counties, there is more available land for new warehouses, and this land is 304 considerably less expensive. Suburban and exurban areas such as these can connect to a more complex 305 306 system of regional and national flows than more urban areas. Zip code 91761, for example, had more establishments than any other zip code studied. While located further away from the San Pedro Bay 307 308 ports, this zip code contains parts of Interstate 15, Interstate 10, and State Route 60. Ontario International 309 Airport is also located within this zip code, giving the area further connections (air cargo activity was 310 437,000 tons in 2012). Additionally, many cities in these counties are taking steps to attract warehousing. The Coachella Valley Economic Partnership has stated that developing warehousing within the valley, 311 312 which currently lies on the far eastern edge of the Inland Empire, is a high priority. Many have engaged in various promotional activities to attract logistics such as Moreno Valley (16, 24). 313

In the Seattle area, the number of warehouses and the number of zip codes with warehouses 314 increased, including zip codes far to the southwest of the barycenter in Olympia, west across the Puget 315 Sound, and north of Seattle. However few of these zip codes had more than one or two establishments. 316 Only seven total zip codes had more than five establishments in 2009, and all were located less than 12 317 miles from the barycenter. Zip Code 98032 in Kent, WA, which has more than twice as many 318 warehouses as any other zip code in the Seattle area, is approximately 10 miles by road to both the Port of 319 320 Tacoma and Port of Seattle, and is less than two miles from Seattle-Tacoma International Airport. The significant clustering of warehouses in the Kent/Renton area, near the weighted geographic center, 321 322 affected the distribution such that the overall distribution has contracted slightly.

In Seattle, it was found that several zip codes which previously did not have any warehouses 323 gained some. The effect of this expansion was mathematically negated by the much larger increase in 324 325 warehouses near Kent, WA, which is relatively close to Seattle. When repeating the barycenter analysis for only King County, shown in Figures 7 and 8, it was found that the barycenter moved away from the 326 327 county to the southwest, but that warehouses in this area moved closer to the barycenter on average. The clustering of warehouses is centrally located between the Ports of Seattle and Tacoma. Additionally, it is 328 very close to SeaTac International Airport, and it is located next to Interstate 5 and State Route 167, the 329 330 two major north-south routes in the area.

Why do we observe a clustering, and increased concentration of warehousing activity in the Puget
Sound region, but sprawl in the Los Angeles area? While not a conclusive analysis, we can point to
several factors that may be significant, some of which provide opportunity for further research.

334 Local Factors

- 335 Some factors explaining the Seattle situation pertain specifically to Seattle. Zip code area 98032 is in a
- very favorable situation relative to the ports, airport, and freeways, and land was still available there at the
- and of the 1990s. Besides, there is a lack of large land parcels elsewhere, due in part to the physical
- 338 geography of the Seattle metro area.

339 Very Large Metropolitan Areas vs. Smaller Metropolitan Areas

- 340 One hypothesis is that logistics sprawl is characteristic of very large metropolitan areas, which serve both
- 341 as trade nodes to the entire region/country as well as enormous consumer markets. Distribution centers
- need to be located close to regional infrastructure networks in order to serve the local, regional and
- national economy. Differentials in land prices (suburban-ex-urban land prices compared with central land
- 344 prices) may also be more important in the largest metropolitan areas. To our knowledge, no empirical
- 345 studies nor theoretical works are available that could verify a relationship between city size and
- 346 warehousesølocational behavior. Although not looking at this particular question, Hall and Hesse (2013)
- from several case studies identify an ideal-typology of the relationship between places and goods flows,
- drawing lines between cities that clearly have very different sizes (17).

349 Growth Management

- 350 Growth management looks at ways of conditioning residential and other developments to the provision of
- 351 necessary services (utilities, infrastructure) and the minimization of negative impacts. It may have played
- a role in explaining the differences between Seattle and Los Angeles regarding the siting of logistics
 activities, although this second hypothesis requires further research. Unfortunately freight is generally
- activities, although this second hypothesis requires further research. Unfortunately freight is generally
 omitted from the literature on growth management and sustainable transportation. Works assessing policy
- 355 tools aimed at mitigating sprawl and climate impacts of transportation (25, 26) or proposing planning
- 356 tools such as the õtransport energy specificationö (27) are provided but do not mention freight. õUrban
- 357 growth boundariesö and õform-based codesö are two planning strategies increasingly adopted in U.S.
- 358 cities that are deemed interesting (28) because they are regional and long term. These are the policies
- implemented by the states of Oregon, Washington and Tennessee. Indeed, in 1990, the Washington State
- 360 legislature adopted the Growth Management Act. The purpose of this act was to ensure coordination
- between local and state governments with regards to growth. Local governments are required to follow a
- 362 comprehensive planning process for any potential new developments. The act created a framework that363 actually constrains how and where warehouses can be constructed and may have affected how the
- actually constrains how and where warehouses can be constructed and may have affected how th distribution of warehouses has changed over time. However, specific assessment of the Growth
- 365 Management Act on warehouses has not been made.

California has not implemented a similar policy of coordinated planning, SB375, the State CO₂ 366 367 mitigation through growth management legislation, leaves much leeway to local communities for final decisions on land uses and has led to some interesting developments in freight planning. In 2011, for 368 369 example, the San Diego Association of Governments (SANDAG) became the first urban region of 370 California to adopt a Sustainable Communities Strategy as a mandatory component of its regional 371 transportation plan. It includes two actions directly related to freight land uses: "Update the SANDAG Regional Comprehensive Plan (RCP) to include policies, programs, and guidelines to integrate goods 372 373 movement land uses and facilities, with minimal impact to adjacent communities." And "Support and 374 provide assistance for the update of local general plans to identify the long-term needs of moving goods, 375 industrial warehousing infrastructure, and connectors to the regional freight network. Coordinate this 376 effort with economic studies and RCP updates." SB375, however, is not comparable to the strategy 377 adopted in Washington. In metro Los Angeles, there happened to be a lot of open space to the east, in the õInland Empireö, the Riverside-San Bernardino-Ontario Metropolitan Area, which contributed to a 378

substantial increase in the number of warehouses there. This had the effect of both expanding the regionas well as moving the barycenter to the east. While roughly 60 miles by road from the Ports of Los

381 Angeles and Long Beach, these new warehousing districts are located in suburban areas near major

382 freeways and an international airport. Due to the availability of cheap land, actions by suburban

383 communities to encourage growth, and, potentially, lack of legislature to discourage growth, we see

384 logistics sprawl occurring in the Los Angeles Metropolitan Area.

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387

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impact on logistical uncertainty.

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