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PROCESS MEMO

# DVRPC Freight Centers: 2025 Update Process

JUNE 2025

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# Introduction

The movement of freight between regional businesses, end consumers, and national and international markets is a complex system with profound impacts on the region's people, economy, and environment. Orchestrating the efficient goods movement requires cooperation between numerous public and private stakeholders. As part of its role as the federally designated Metropolitan Planning Organization (MPO) for the Greater Philadelphia area, the Delaware Valley Regional Planning Commission (DVRPC) studies where freight-intensive industries—such as manufacturing facilities and warehouses—are located, in order to better understand the region's transportation needs and inform the comprehensive planning process. This analysis identified 75 total freight centers, up from the 67 that were included in the previous 2017 iteration.

## Freight Center Definition

A freight center is an area with a concentration of facilities that generate significant amounts of freight activity as well as employment in related sectors. This definition does not include retail centers or other concentrations of businesses that are primarily customer-facing. DVRPC designates freight centers throughout its nine-county region to help document current transportation and land use patterns as part of the comprehensive planning process that includes the development of the region's Transportation Improvement Plan and Long-Range Plan.

## Freight Center Typology

Freight centers are assigned a descriptive type based on their physical form and the kind of businesses located within them. The five freight center types are:

- **International Gateway Centers** are oriented around a major port or airport that serves to connect the region with national and international markets.
- **Heavy Industrial Centers** are defined by the presence of large industrial facilities such as factories, petroleum refineries, and steel mills, which are engaged in the manufacturing of goods or the refining of raw resources.
- **Distribution and Logistics Centers** have ample warehousing space and highway connectivity.
- **High Tech Manufacturing Centers** are defined by the presence of pharmaceutical, biotechnology, or aviation businesses, though these facilities can take different physical forms.
- **Local Manufacturing and Distribution Centers** are comprised of smaller, general-purpose buildings occupied by small businesses and tend to be located closer to end customers in residential or commercial areas than the other types of centers.

## Need for an Update

The data used to develop the 2017 freight centers has grown increasingly out of date. At the same time, certain freight-intensive industries, especially warehousing, have seen significant growth across the region. This discrepancy prompted DVPRC to initiate an update of these designations to ensure their continued accuracy and utility. The 2025 update process was similar to the one used in 2017 except that some data sources were replaced because they were no longer available.

# Process Overview

The process of identifying freight centers had three main steps. First, a quantitative analysis was performed that calculated a freight score for every Census Block in the DVRPC region using data on land use, employment, industrial properties, and intermodal facilities. Second, these scores were then compared to the 2017 freight centers boundaries to highlight areas that should be examined for possible changes. Third, DVRPC staff manually reviewed these areas, noting where new freight centers may be added or existing freight center boundaries changed. A combination of employment data, environmental records, and manual review was then used to assign or reassign one of five types to the updated centers.

# Data Sources for Scoring

This section identifies the data sources used for the raw metric values, which were then translated into subscores for land use, employment, industrial properties, and intermodal facilities.

## Land Use

DVRPC maintains a publicly available land use layer for its nine counties that classifies land area based on activity (such as residential, commercial, industrial). Areas are assigned a general two-digit category code and a more specific five-digit sub-category code. A subset of the most recent land use layer, released in 2023, was used to measure the portion of each Census Block occupied by freight-intensive land use.

## Employment

Job counts from 2021 were obtained from the U.S. Census Bureau's Longitudinal Employer-Household Dynamics (LEHD) Origin-Destination Employment Statistics, Version 8 (LODES 8). The number of jobs by North American Industry Classification System (NAICS) sector codes at the 2020 Census Block-level from the LODES 8 workplace area characteristics file was used to quantify freight employment.

## Industrial Properties

CoStar is a proprietary real estate and property database comprised of point-based features with attributes such as property type, floor area, and building amenities. The CoStar dataset was retrieved in April 2024 and used to calculate the number of industrial properties and the total square footage of those properties in each Census Block.

## Intermodal Facilities

DVRPC maintains datasets of intermodal rail yards and port terminals within its nine-county region. These two datasets were updated in 2024 and combined into an intermodal facilities layer for use as inputs for a proximity-based analysis.

# Freight Score Calculation

Each Census Block was assigned a freight score defined by the sum of four subscores, as shown in Table 1, the freight score for was defined by the sum of four sub-scores. Census Blocks were chosen as the unit of analysis due to their complete coverage of the region and the availability of data at that level. The industrial land use, freight employment, and industrial properties subscores were calculated by transforming a raw metric value into a score between zero and five, inclusive, using manually established breakpoints. The breakpoints were established through an exploratory process that aimed for a score distribution that would indicate if a freight center has grown, shrunk, or recently been established, in relation to the existing freight center boundaries. Ultimately, all blocks whose metric values were zero were assigned a zero score, and all blocks that had a metric value greater than zero were assigned a score of at least one. Breakpoints were set such that blocks with a score of four or more were heavily concentrated within or adjacent to existing freight centers, and blocks with a score of two or three tended to cluster in and around existing freight centers but were also visibly present outside of existing freight centers. The proximity to an intermodal facility subscore was calculated using a geospatial process, which is described below.

### Table 1: Component Subscores

| Subscore | | Raw Metric | Maximum Score |
|---|---|---|---|
| **Industrial Land Use** | | Percent of area occupied by a freight-intensive land use | 5 |
| **Freight Employment** | | Number of Employees | 5 |
| **Industrial Properties:** | | | 5 |
| **Maximum of** | **Industrial Properties** | Number of Industrial Properties | |
| | **Industrial Space** | Square Feet of Industrial Space | |
| **Proximity to an Intermodal Facility** | | Distance | 2 |
| **Total** | | | 17 |

## Industrial Land Use

The industrial land use subscore is based on the portion of the Census Block's land area that is occupied by freight-intensive land use. For the purposes of this analysis, freight-intensive land uses include the following subcategories:

- 03000 (Industrial: General)
- 03009 (Parking-Industrial: General)
- 03010 (Industrial: Mixed-Use)
- 03019 (Parking-Industrial: Mixed-Use)
- 03020 (Industrial: Warehousing/Distribution/Open Storage)
- 03029 (Parking-Industrial: Warehousing/Distribution/Open Storage)
- 04000 (Transportation: Facility)
- 04009 (Parking-Transportation: Facility)
- 04030 (Transportation: Airport)
- 04039 (Parking-Transportation: Airport)
- 05000 (Utility: Right-of-Way)
- 05010 (Utility: Landfill)
- 05019 (Parking-Utility: Landfill)
- 05020 (Utility: Wastewater Treatment)
- 05029 (Parking-Utility: Wastewater Treatment)
- 05030 (Utility: Other Facility)
- 05039 (Parking-Utility: Other Facility)
- 05040 (Utility: Recycling)
- 05049 (Parking-Utility: Recycling)
- 11000 (Mining)
- 11009 (Parking-Mining)

### Freight Employment

The freight employment sub-score was calculated based on the number of jobs in freight-intensive industries. For this analysis freight-intensive industries include those with NAICS sector codes 11 (Agriculture, Forestry, Fishing, and Hunting), 21 (Mining, Quarrying, and Oil and Gas Extraction), 22 (Utilities), 23 (Construction), 31-33 (Manufacturing), 42 (Wholesale Trade), and 48-49 (Transportation and Warehousing).

### Industrial Properties

For the industrial properties subscore, two metrics, the number of buildings and the total square footage of those buildings—were calculated at the Census Block-level and assigned a value between zero and five, inclusive, but only the greater of the two contributed to the final score. Both metrics were based on industrial properties extracted from the point-based CoStar real estate database. This data was used to sum the number of industrial properties and the floor area in square feet of those buildings for each Census Block.

### Proximity to an Intermodal Facility

The points awarded for proximity intermodal facility were based on a geometric buffer was created around the intermodal facilities. Those buffer polygons were intersected with the Census Blocks to determine their score. Census blocks were given two points if they were within a half of a mile of an intermodal facility and one point if they were within one mile of an intermodal facility.

## Manual Review

Once the freight score had been calculated for all Census Blocks in the region, the scores were compared to the freight center boundaries established in 2017 to determine which blocks needed to be reviewed for changes using the following cutoffs:

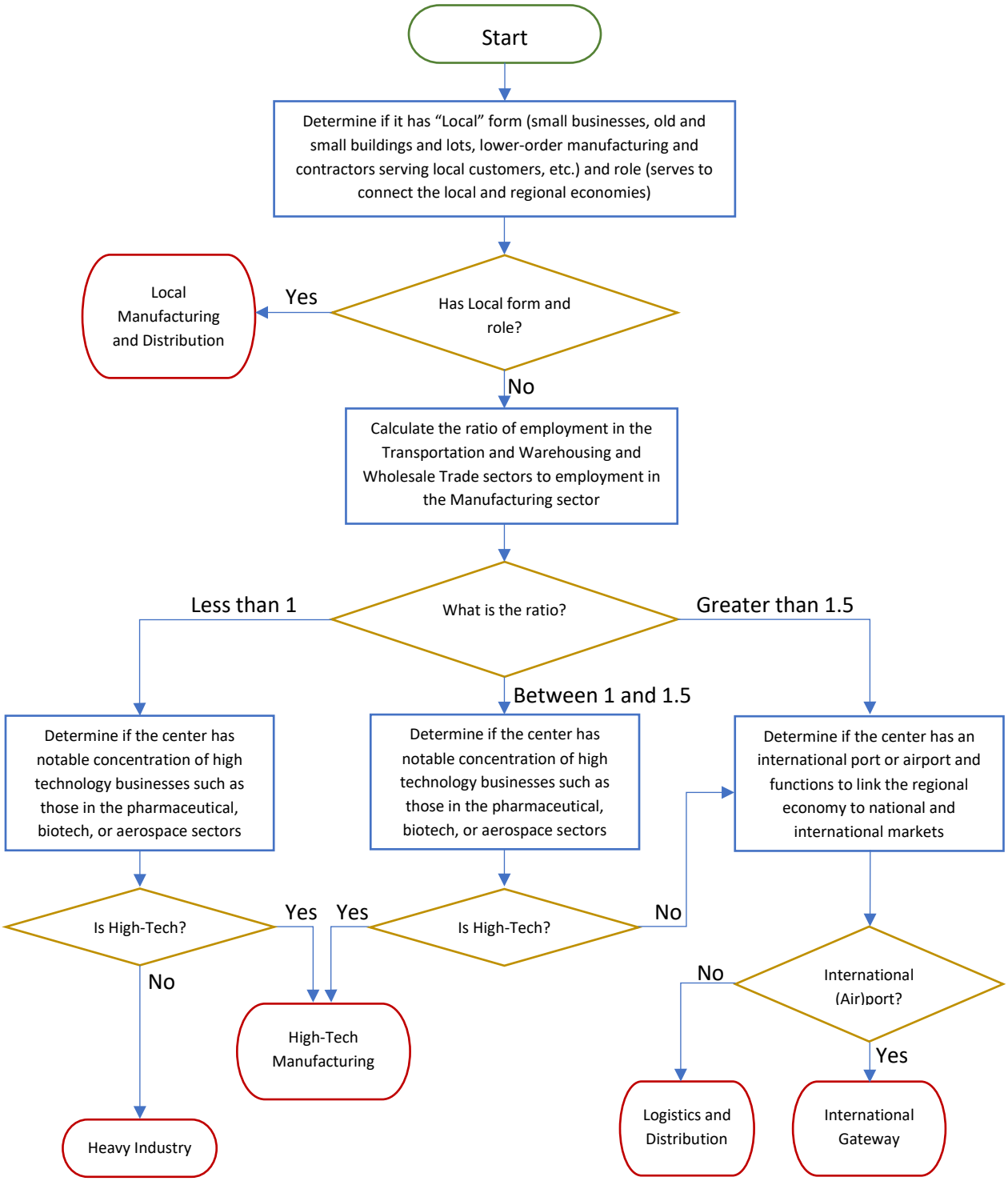
- Blocks outside of an existing center with a score of nine or higher were reviewed for a possible new center.
- Blocks adjacent to or partially overlapping with an existing center with a score of five or higher were reviewed for a possible expansion of that center.
- Blocks that overlap with an existing center with a score of four or less were reviewed for a possible shrinkage of that center.

Within each Census Block, each property parcel was evaluated separately for the presence of a freight-intensive business, and parcels for addition or deletion were noted. Following the manual review, the center boundaries were redrawn to reflect these changes.

## Typology Classification

After the boundaries had been redrawn, the newly added centers were assigned a type, and existing centers were re-examined to determine if their classifications were still appropriate. As shown in Figure 2, one of the key details considered, in addition to the physical form of the center, was a calculated ratio between the combined employment of the wholesale trade and transportation and warehousing sectors and employment in the manufacturing sector. This meant that a high ratio indicated a logistics focus and a low ratio indicated a manufacturing focus. Furthermore, environmental records and online research were used to help distinguish between high-tech manufacturing and other kinds of industrial activity. These environmental records were downloaded from the United States Environmental Protection Agency's Facility Registry Service and filtered to only include facilities with six-digit NAICS codes beginning with 3254 (Pharmaceutical and Medicine Manufacturing), 3364 (Aerospace Product and Parts Manufacturing), and 3391 (Medical Equipment and Supplies Manufacturing).

## Figure 1: Typology Classification Flowchart

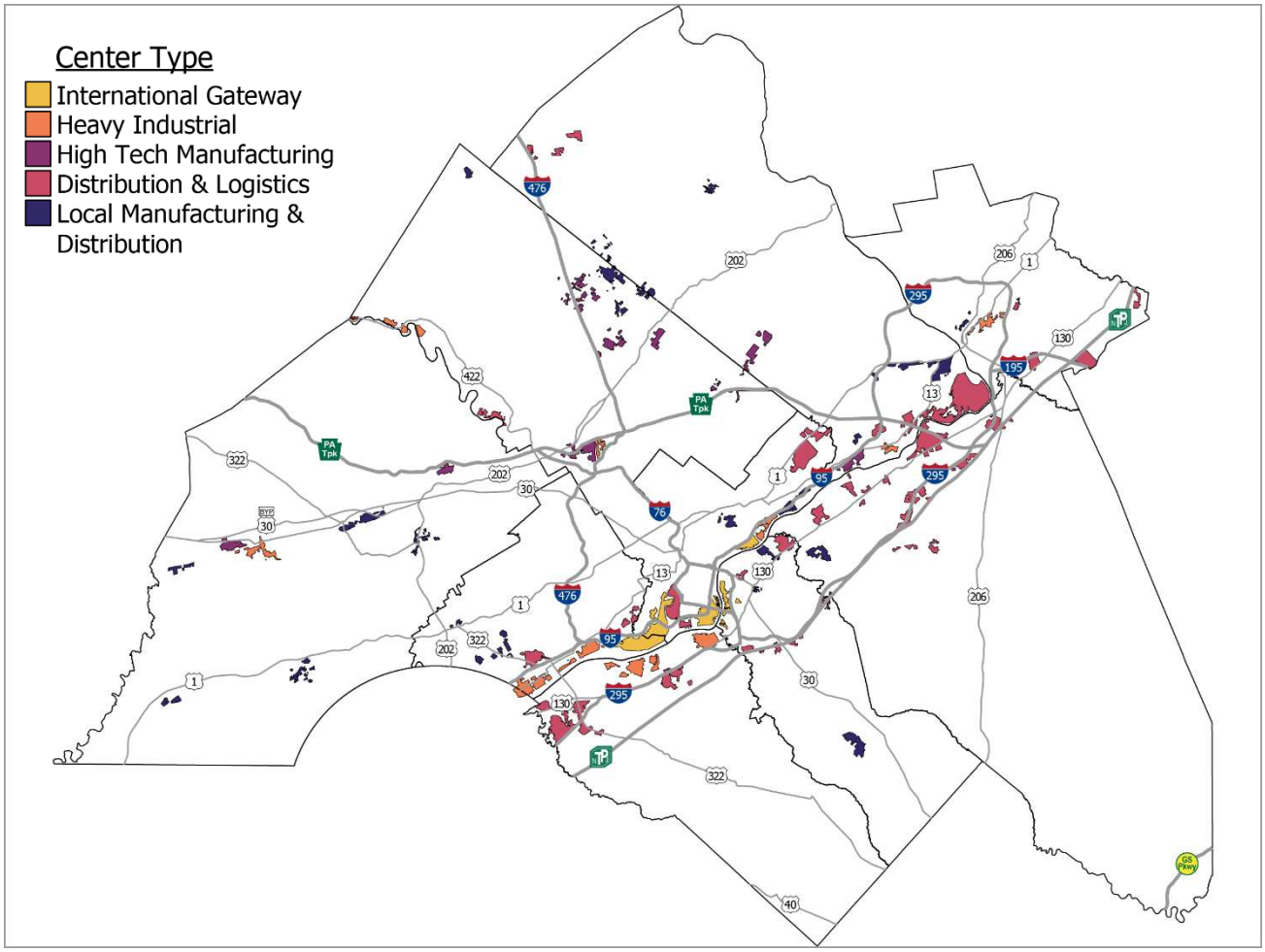



*Source: DVRPC, 2025*

# Results

The 2025 update process designated a total of 75 freight centers in the DVRPC region, as shown in Figure 2 and listed in Table 2, this is up from 67 centers in 2017. Ultimately, seven new centers were added, 15 centers had their type changed, and six centers were created by redrawing the boundaries of 5 existing centers that had grown large or diffuse enough to be split. As highlighted in Figure 3, of the seven newly added centers, four are Distribution and Logistics centers in New Jersey, two are Local Manufacturing and Distribution centers in Pennsylvania, and one is a Heavy Industrial center in Montgomery County. Of the 15 type changes, eight became Distribution and Logistics centers, four became Local Manufacturing and Distribution centers, one became High Tech, and one became Heavy Industrial. Table 3 shows the current number of centers by type and county as well as the change since 2017. Overall, the new centers and type changes underscore the significant growth seen in the warehousing sector, especially in New Jersey.

### Figure 1: 2025 Freight Centers




*Source: DVRPC, 2025*

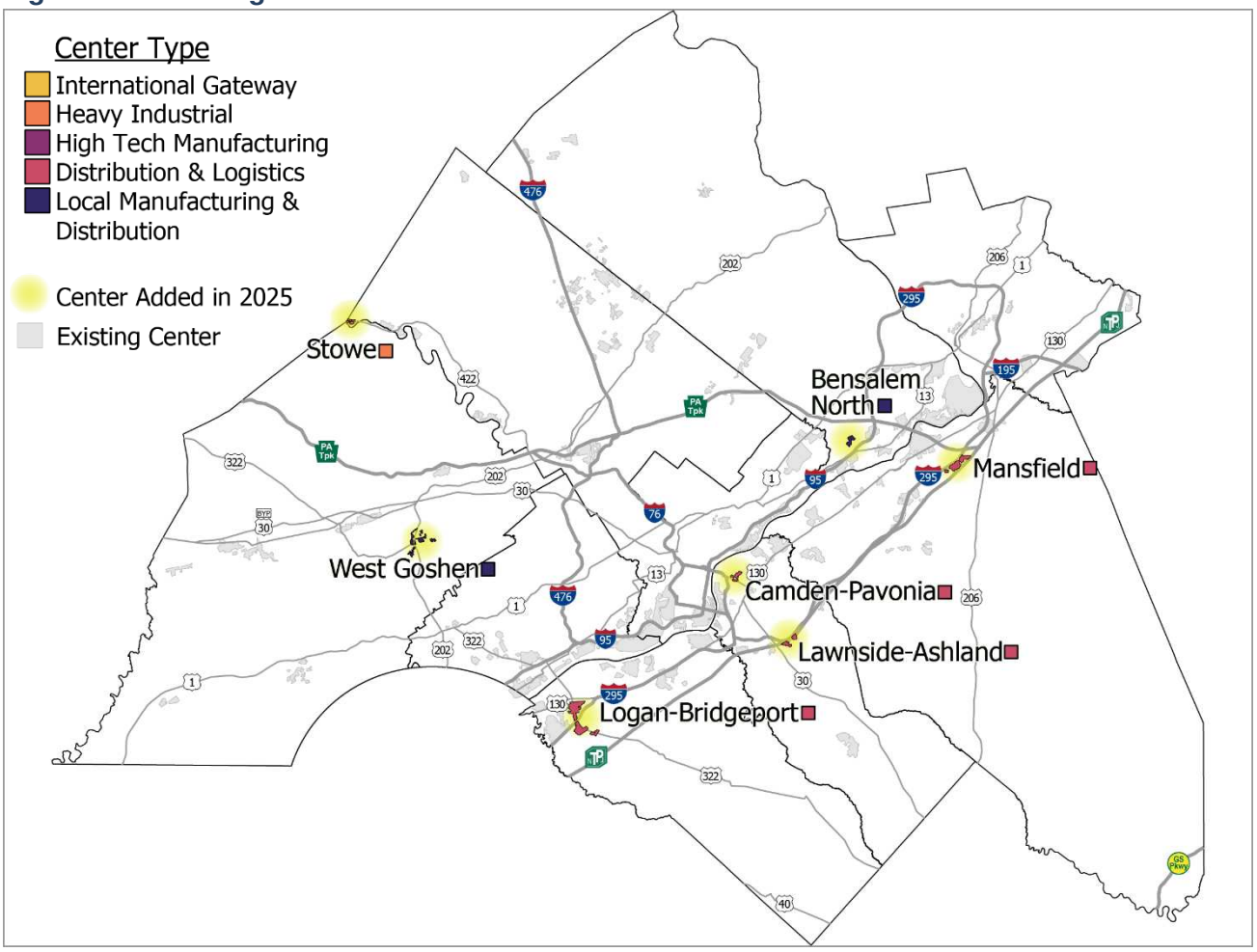
### Table 2: 2025 Freight Centers and Changes

| County | ID | Name | Type | Change |
|---|---|---|---|---|
| **Bucks** | FC81 | Bensalem North | Local | New Center |
| **Bucks** | FC03 | Bensalem South | High Tech | |
| **Bucks** | FC05 | Bristol North | Distribution | Type Change |
| **Bucks** | FC04 | Bristol South | Heavy Industrial | Type Change |
| **Bucks** | FC08 | Falls-Keystone Trade Center | Distribution | Type Change |
| **Bucks** | FC06 | Falls-Middletown | Local | |
| **Bucks** | FC07 | Falls-Morrisville | Local | Type Change |
| **Bucks** | FC45 | Plumstead | Local | Type Change |
| **Bucks** | FC01 | Quakertown Interchange | Distribution | |
| **Bucks** | FC82 | Telford | Local | Newly Divided |
| **Bucks, Montgomery** | FC02 | Warminster | High Tech | |
| **Burlington** | FC09 | Cinnaminson-Delran | Distribution | |
| **Burlington** | FC48 | Delanco | Distribution | Type Change |
| **Burlington** | FC11 | Hainesport | Distribution | Type Change |
| **Burlington** | FC77 | Mansfield | Distribution | New Center |
| **Burlington** | FC57 | Moorestown | Local | |
| **Burlington** | FC47 | NJTP Exit 5 | Distribution | |
| **Burlington** | FC10 | NJTP Exit 6A | Distribution | |
| **Burlington** | FC56 | NJTP Exit 7-Bordentown | Distribution | |
| **Camden** | FC55 | Barrington-Magnolia | Distribution | |
| **Camden** | FC37 | Camden-Gloucester Port Complex | International | |
| **Camden** | FC78 | Camden-Pavonia | Distribution | New Center |
| **Camden** | FC79 | Lawnside-Ashland | Distribution | New Center |
| **Camden** | FC38 | NJTP Exit 3 | Distribution | Type Change |
| **Camden** | FC39 | Pennsauken North | Distribution | |
| **Camden** | FC50 | Pennsauken South | Local | |
| **Camden** | FC53 | Pennsauken-Cooper River | Local | |
| **Camden** | FC60 | Winslow | Local | |
| **Camden, Burlington** | FC54 | NJTP Exit 4 | High Tech | |
| **Chester** | FC25 | Coatesville | Heavy Industrial | |
| **Chester** | FC24 | Downingtown | Local | |
| **Chester** | FC70 | East Whiteland | High Tech | |
| **Chester** | FC26 | New Garden | Local | |
| **Chester** | FC67 | Oxford | Local | |
| **Chester** | FC68 | Valley-Sadsbury | High Tech | |
| **Chester** | FC87 | West Goshen | Local | New Center |
| **Chester** | FC69 | West Sadsbury | Local | Type Change |
| **Delaware** | FC62 | Aston-Bethel | Local | |
| **Delaware** | FC35 | Chester-Eddystone | Heavy Industrial | |
| **Delaware** | FC61 | Concord | Local | |

| | | | | |
|---|---|---|---|---|
| **Delaware** | FC36 | Darby-Folcroft | Distribution | |
| **Delaware** | FC34 | Marcus Hook-Trainer | Heavy Industrial | |
| **Delaware** | FC33 | Upper Chichester | Distribution | |
| **Gloucester** | FC80 | Logan-Bridgeport | Distribution | New Center |
| **Gloucester** | FC22 | Logan-Pureland | Distribution | |
| **Gloucester** | FC20 | Paulsboro | Heavy Industrial | |
| **Gloucester** | FC19 | West Deptford | Distribution | Type Change |
| **Gloucester** | FC21 | Westville | Heavy Industrial | |
| **Mercer** | FC52 | Hamilton North | Distribution | |
| **Mercer** | FC58 | Hamilton South | Distribution | |
| **Mercer** | FC31 | NJTP Exit 7A-Robbinsville | Distribution | |
| **Mercer** | FC59 | NJTP Exit 8 | Distribution | |
| **Mercer** | FC51 | Trenton-Ewing | Local | |
| **Mercer** | FC32 | Trenton-Hamilton | Heavy Industrial | |
| **Montgomery** | FC41 | Lansdale Borough | Local | |
| **Montgomery** | FC84 | Lansdale Interchange | High Tech | Newly Divided |
| **Montgomery** | FC29 | Montgomery | High Tech | |
| **Montgomery** | FC90 | Plymouth | Heavy Industrial | Newly Divided |
| **Montgomery** | FC27 | Pottstown | Heavy Industrial | |
| **Montgomery** | FC71 | Stowe | Heavy Industrial | New Center |
| **Montgomery** | FC40 | Upper Gwynedd | High Tech | |
| **Montgomery** | FC64 | Upper Hanover | Local | |
| **Montgomery** | FC86 | Upper Merion | High Tech | Newly Divided |
| **Montgomery** | FC66 | Upper Providence | Distribution | Type Change |
| **Montgomery** | FC63 | Willow Grove Interchange | High Tech | Type Change |
| **Montgomery, Bucks** | FC83 | Hatfield East | Local | Newly Divided |
| **Montgomery, Bucks** | FC85 | Hatfield North | Local | Newly Divided |
| **Philadelphia** | FC12 | Northeast Philadelphia Airport | Distribution | Type Change |
| **Philadelphia** | FC42 | Philadelphia-Bridesburg | Heavy Industrial | |
| **Philadelphia** | FC17 | Philadelphia-Girard Point | Distribution | Type Change |
| **Philadelphia** | FC13 | Philadelphia-Hunting Park | Local | |
| **Philadelphia** | FC49 | Philadelphia-Tacony | Local | |
| **Philadelphia** | FC16 | South Philadelphia Port Complex | International | |
| **Philadelphia** | FC15 | Tioga Port Complex | International | |
| **Philadelphia, Delaware** | FC18 | Philadelphia International Airport | International | |

*Source: DVRPC, 2025*

## Figure 2: New Freight Centers in 2025




*Source: DVRPC, 2025*

## Table 3: Center Counts and Changes by County and Type

| | Distribution | Heavy | High Tech | International | Local | Total |
|---|---|---|---|---|---|---|
| **Bucks** | 3 (+2) | 1 | 2 (-2) | | 5 (+2) | 11 (+2) |
| **Burlington** | 7 (+3) | | 0 (-2) | | 1 (-1) | 8 |
| **Camden** | 5 (+3) | | 1 | 1 | 3 (-1) | 10 (+2) |
| **Chester** | | 1 | 2 (-1) | | 5 (+2) | 8 (+1) |
| **Delaware** | 2 | 2 | | | 2 | 6 |
| **Gloucester** | 3 (+2) | 2 | | | 0 (-1) | 5 (+1) |
| **Mercer** | 4 | 1 | | | 1 | 6 |
| **Montgomery** | 1 (+1) | 3 (+1) | 5 (+2) | | 4 (-2) | 13 (+2) |
| **Philadelphia** | 2 (+2) | 1 (-1) | | 3 | 2 (-1) | 8 |
| **DVRPC** | 27 (+13) | 11 | 10 (-3) | 4 | 23 (-2) | 75 (+8) |

*Source: DVRPC, 2025*

## Conclusion

The designations resulting from this analysis are intended to highlight regional trends in employment and industrial development, and in turn inform transportation and land use planning decisions made by planners and elected officials. Within DVPRC, these freight centers are currently being used to help designate a regional truck network and proximity to a freight center is used as a criterion when evaluating projects for inclusion in the region's Transportation Improvement Plan and Long-Range Plan.

The freight center designations resulting of this analysis are publicly available via DVRPC's Data Catalog and the PhillyFreightFinder web application.

# DVRPC Freight Centers: 2025 Update Process

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The nine-county DVRPC region, comprised of Bucks, Chester, Delaware, Montgomery, and Philadelphia counties in Pennsylvania, and Burlington, Camden, Gloucester, and Mercer counties in New Jersey

**Key Words:**
freight, centers, economy, land use, industry, warehouse, manufacturing, logistics, distribution, truck, process, methodology, goods movement

**Abstract:**
This document describes the process used for the 2025 update of DVRPC's freight center designations including data sources, scoring system, and typology classification.

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**DVRPC's mission** is to achieve this vision by convening the widest array of partners to inform and facilitate data-driven decision-making. We are engaged across the region, and strive to be leaders and innovators, exploring new ideas and creating best practices.

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