




## The Future of Industry

### American Planning Association State Conference

Puget Sound Regional Council  
PSRC

October 18, 2014



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### Background



### Industrial Lands Analysis

### Trends in manufacturing

### Industrial Lands Analysis Findings



### Questions

### Strategy break out discussion

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Ensure a **thriving central Puget Sound** now and into the future through planning for regional **transportation, growth management** and **economic development**.

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### Analyzed:

- **Industrial Employment**
- **Supply of Industrial Land**
- **Demand for Industrial Land**

*Industrial Land Supply and Demand in the Central Puget Sound Region*


PUGET SOUND REGIONAL COUNCIL UNIVERSITY OF WASHINGTON CENTER FOR ENVIRONMENTAL DEVELOPMENT & POLICY 10/2003-2010



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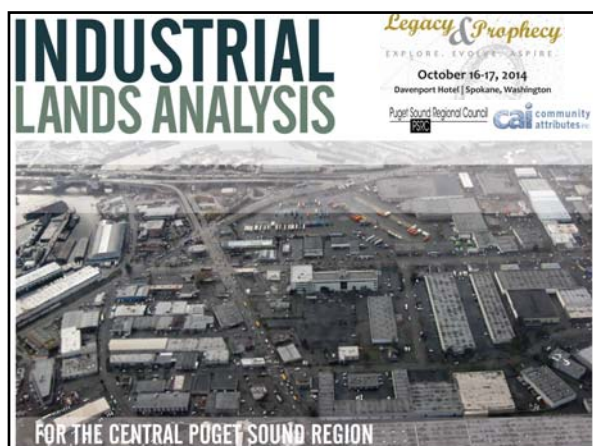
### Providing:

- **Guidance on methodology**
- **Input on data sources**
- **Feedback on draft findings**

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1. What is the contribution of industrial land to the regional economy?
2. How much of the region's industrial employment is on industrial land?
3. What is the distribution of industrial land in the region? Where are the major concentrations?
4. How has the quantity, distribution, and development level of industrial land in the region changed since 1998?
5. What factors influence the development of industrial land?
6. Does the region have an adequate supply of industrial land to meet industry demand?
7. How are jurisdictions in the region planning for their industrial land (MICs, other designated industrial land, and nonindustrial land with industrial uses)?
8. What actions, investments, or strategies do stakeholders think are needed to ensure an adequate supply of industrial land?



## 1 MORE CONTEXT

## 2 SUPPLY ANALYSIS & METHODS

## 3 INFRASTRUCTURE & INDUSTRIAL AREA ASSETS

## 4 DEMAND FORECASTING CHALLENGES

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## Why study?

"The purpose of the industrial lands analysis is to briefly describe the importance of industrial lands to the regional economy, to assess whether the region has an adequate and appropriate supply of industrial land for the future, and to identify planning issues related to industrial lands that should be addressed."



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## How will the needs of industrial users change in coming years and decades...?

- > Increased automation & technology-driven changes to production;
- > Proliferation of light industrial/lab/warehouse/office "flex space"
- > Maker culture, 3D printing, crowdsourced design, mfg aggregation;



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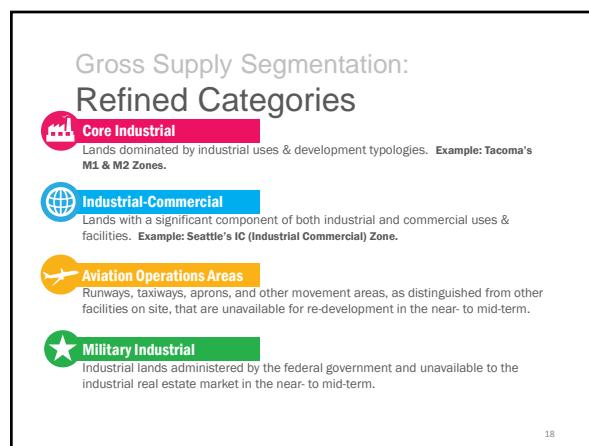
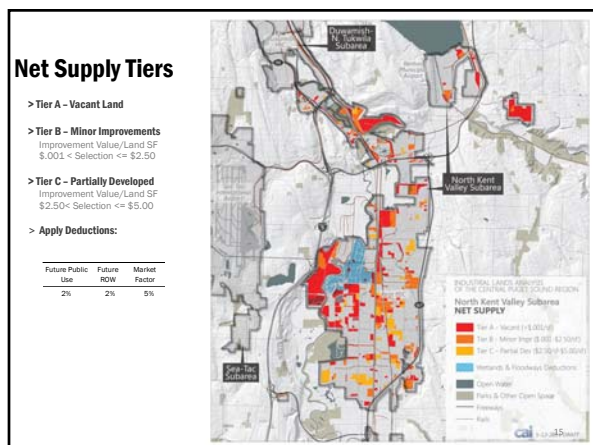
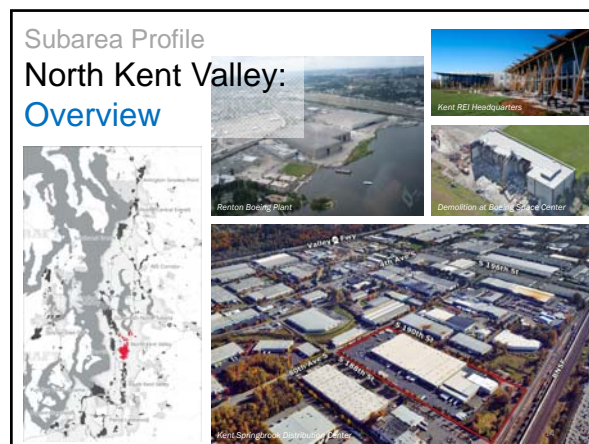
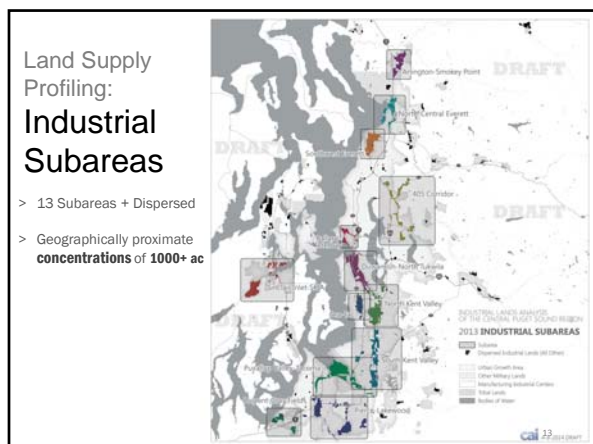
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## 2 SUPPLY ANALYSIS & METHODS

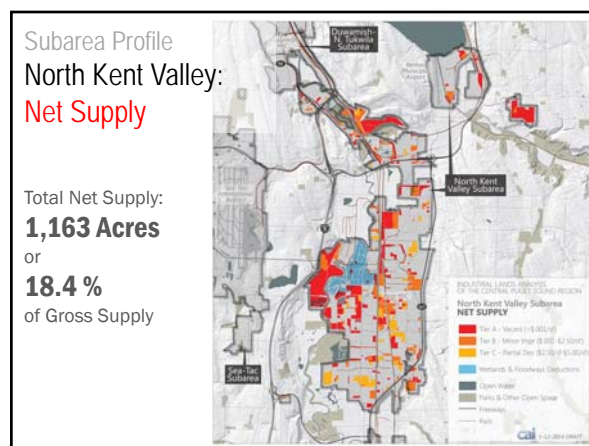
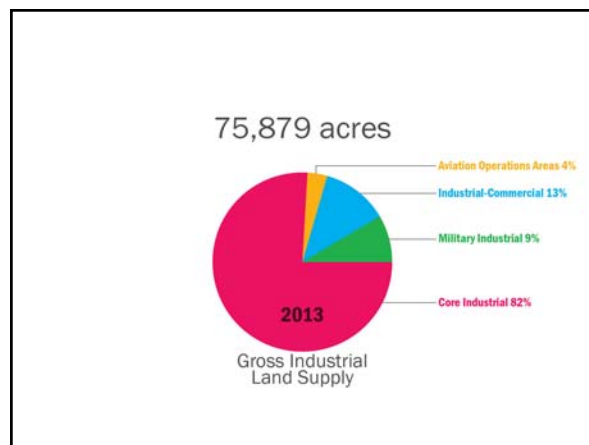
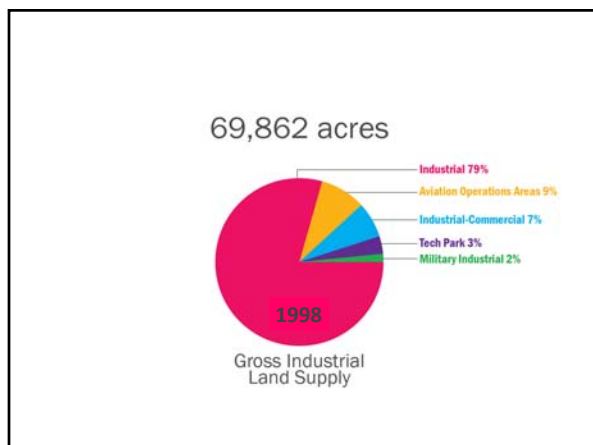
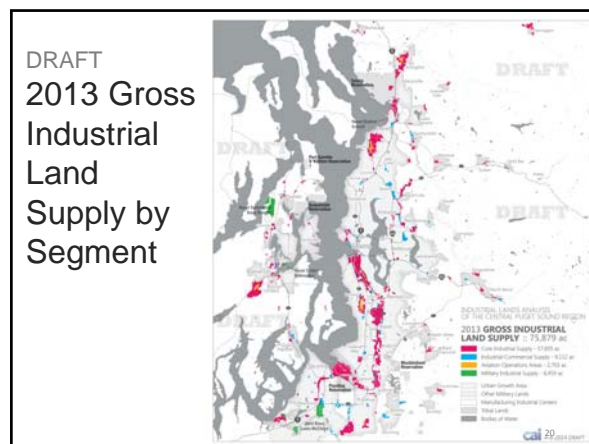
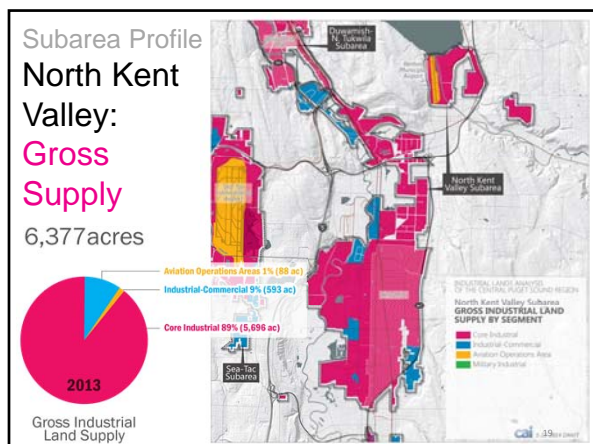
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## 4 DEMAND FORECASTING CHALLENGES

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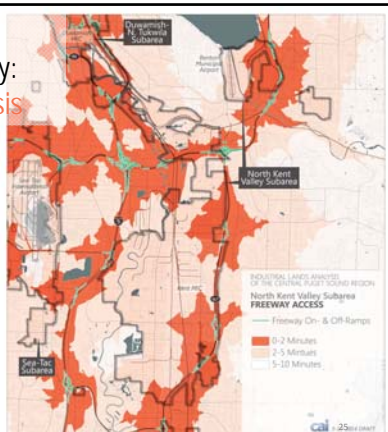




### Subarea Profile North Kent Valley: Suitability Analysis

- > Freeway access from N. Kent is generally very good
- > Green River does form a minor barrier to direct I-5 access for industrial sites to the east

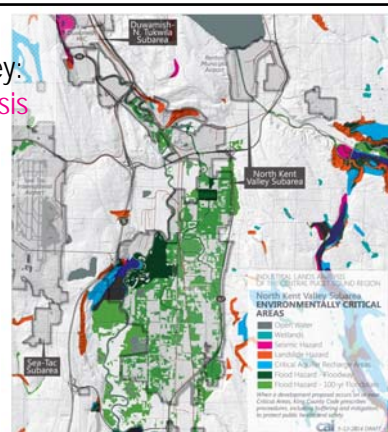
Source: Community Attributes; ESRI



### Subarea Profile North Kent Valley: Suitability Analysis

- > Much of the Green River valley in N. Kent Subarea is within the 100 year floodplain
- > The zone south of Southcenter is heavily constrained by Critical Areas

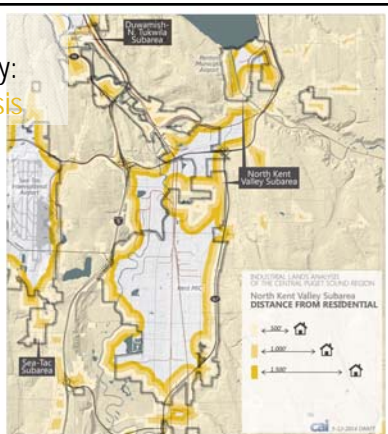
Source: Community Attributes; King County



### Subarea Profile North Kent Valley: Suitability Analysis

- > An exceptionally large, contiguous core of the N. Kent Subarea is well-buffered from surrounding residential zones
- > Even areas less-buffered by distance - as in Tukwila - are buffered by topography from nearby residential

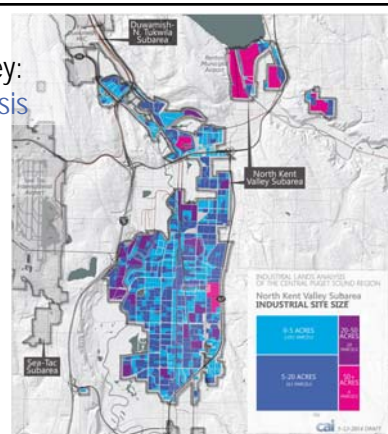
Source: Community Attributes; King County Dept. of Assessments



### Subarea Profile North Kent Valley: Suitability Analysis

- > Kent's largest sites occur in a concentration between I-5 and the Green River, east of 188th
- > Renton contains nearly all of the large industrial sites in N. Kent Subarea

Source: Community Attributes; King County Dept. of Assessments



1 MORE CONTEXT

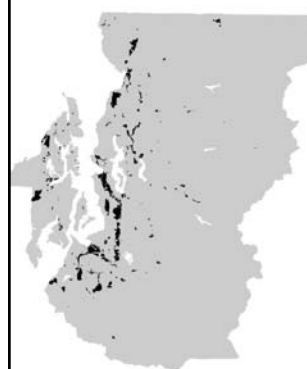
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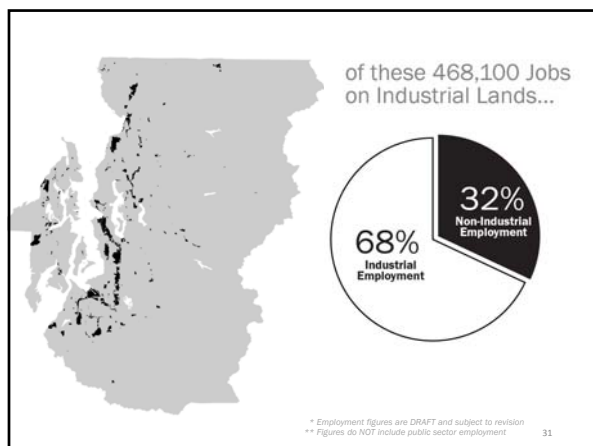
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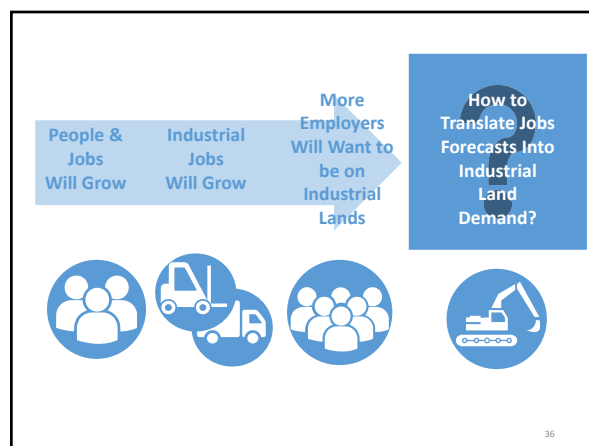
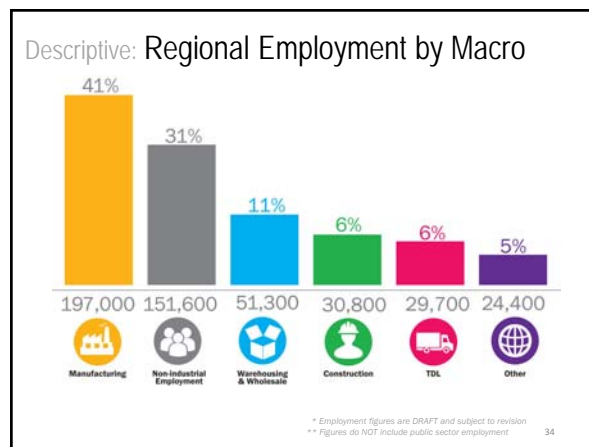
in 2012, there were  
**1,736,476** jobs in the  
4-county central  
Puget Sound region  
**468,100** or **27%**  
were located on  
industrial lands

\* Employment figures are DRAFT and subject to revision  
\*\* Figures do NOT include public sector employment

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NAICS		
221 Utilities	336 Electrical Equipment, App & Component	56191 Packaging & Labeling
236 Construction of Buildings	337 Furniture & Related Product	72232 Caterers
238 Specialty Trade Contractors	339 Miscellaneous	72233 Mobile Food Services
237 Heavy & Civil Eng. Construction	327 Nonmetallic Mineral Product	82423 Community Food Services
311 Food	423 Merchant Wholesalers (Durable)	81223 Linen & Uniform Supply
312 Beverage & Tobacco Product	424 Merchant Wholesalers (Non-durable)	81232 Industrial Launderers
313 Textile Mills	425 Electronic Markets, Agents & Brokers	8113 Commercial & Ind. Equip. Repair
314 Textile Product Mills	493 Warehousing & Storage	81142 Appliance Repair & Maintenance
315 Apparel	53131 Mini Warehouse & Self Storage	82191 Ambulance Services
316 Leather & Allied Product	481 Air Transportation	821991 Blood & Organ Banks
321 Wood Product	482 Rail Transportation	821992 Security Guards & Patrol
322 Paper	483 Water Transportation	8612 Security Systems
323 Printing & Related Support	484 Truck Transportation	86171 Extermination & Pest Control
311 Publishing Industries	485 Transit & Ground Passenger Transport	86172 Janitorial
324 Petroleum & Coal Products	486 Pipeline Transportation	86173 Landscaping
325 Chemical	487 Scenic and Sightseeing Transportation	86174 Carpet & Upholstery Cleaning
326 Plastics & Rubber Products	488 Support Activities for Transportation	86179 Other Services to Buildings & Dwellings
331 Primary Metal	491 Postal Service	962 Waste Management & Remediation
332 Fabricated Metal Product	492 Couriers & Messengers	4542 Vending Machine Operators
333 Machinery	53212 Truck Rental & Leasing	454311 Hoisting Or Dealers
336 Transportation Equipment	5324 Machinery Equip. Rental & Leasing	54138 Training Laboratories
334 Computer & Electronics	51211 Motion Picture & Video Prod	54185 Display Advertising

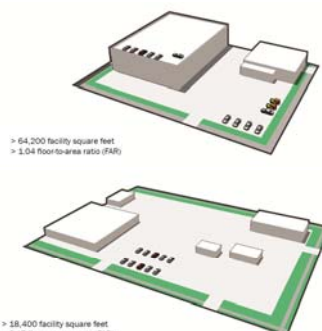


Do we have **enough** of the **right kinds** of industrial land to satisfy demand for the next twenty years?



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## Density Illustrated: Sample Commercial F.A.R.s



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## Density Illustrated:

### Sample Industrial Empl/Acre

Austin-Mac Conveyor Systems Manufacturing,  
Duwamish Subarea



Site area: .74  
acres  
Employees: 25  
F.A.R.: .78

**Density: 33  
empl/acre**

## Density Illustrated:

### Sample Industrial Empl/Acre

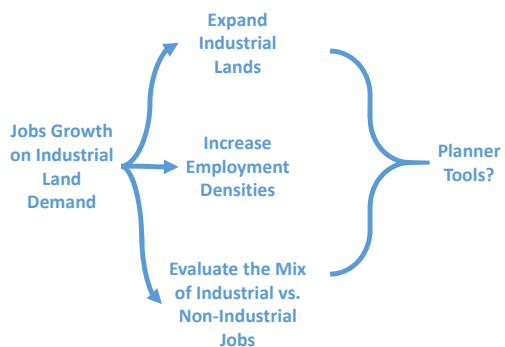
Mutual Materials Cement & Concrete Products Manufacturing,  
S. Kent Valley Subarea



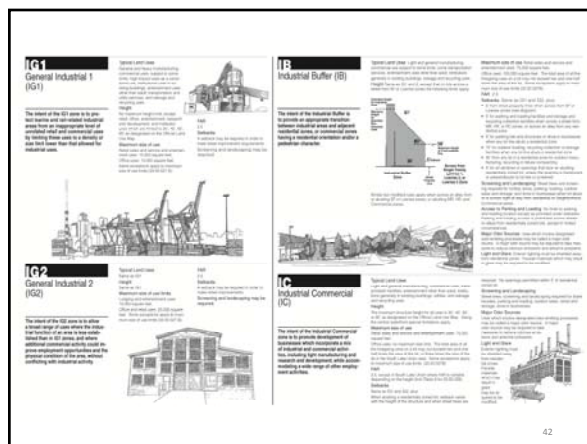
Site area: 7  
acres  
Employees: 30  
F.A.R.: .22

**Density: 4.2  
empl/acre**

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**Allowed Industrial Uses****A.AGRICULTURAL USES**

A.2.Aquaculture

A.3.Community Garden

A.5.Urban Farm

**C.COMMERCIAL USES**

C.1.Animal Shelters and Kennels

C.2.Eating and drinking establishments

C.3.Entertainment Uses

C.3.a. Cabarets, adult

C.3.d.Sports and recreation, indoor

C.3.e.Sports and recreation, outdoor

C.3.f.Theaters and spectator sports facilities

C.3.i.Lecture and meeting halls

C.3.ii.Motion picture theaters

C.3.iii.Performing arts theaters

C.3.iv.Spectator sports facilities

C.4.Food processing and craft work

C.5.Laboratories, Research and development

C.6.Lodging uses

C.7.Medical services (3)

C.8.Offices

C.9.Sales and services, automotive

C.10.Sales and services, general

C.11.Sales and services, heavy

C.12.Sales and services, marine

**E.INSTITUTIONS**

E.2.Child care centers

E.3.Colleges

E.4.Community centers and Family support centers

E.5.Community clubs

E.6.Hospitals

E.7.Institutes for advanced study

E.9.Major institutions subject to the provisions of Chapter

23.69

E.10.Museums

E.11.Private Clubs

E.12.Religious facilities

E.13.Schools, elementary or secondary

E.14.Vocational or fine arts schools

**G.MANUFACTURING USES**

G.1.Manufacturing, light

G.2.Manufacturing, general

G.3.Manufacturing, heavy

**H.PARKS AND OPEN SPACE****I.PUBLIC FACILITIES**

I.3.Other public facilities

**J.RESIDENTIAL USES**

J.2.Artist's studio/dwellings

J.3.Caretaker's quarters

J.4.Residential use, except artist's studio/dwellings and

caretaker's quarters, in a landmark structure or landmark

district

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**K.STORAGE USES**

K.1.Mini-warehouses

K.2.Storage, outdoor

K.3.Warehouses

**L.TRANSPORTATION FACILITIES**

L.1.Cargo terminals

L.2.Parking and moorage

L.2.a.Boat moorage

L.2.b.Dry boat storage

L.2.c.Parking, principal use, except as listed

below

L.2.c.i.Park and Pool Lots

L.2.c.ii.Park and Ride Lots

L.2.d.Towing services

L.3.Passenger terminals

L.4.Rail Transit Facilities

L.5.Transportation facilities, air

L.5.a.Airports (land-based)

L.5.b.Airports (water-based)

L.5.c.Heliports

L.5.d.Helistops

L.6.Vehicle storage and maintenance

L.6.a.Bus bases

L.6.b.Railroad switchyards

L.6.c.Railroad switchyards with a mechanized

hump

L.6.d.Transportation services, personal

**M.UTILITY USES**

M.1.Communication Utilities, major

M.2.Communication Utilities, minor

M.3.Power Plants

M.4.Recycling

M.5.Sewage Treatment Plants

M.6.Solid waste management

M.6.a.Salvage yards

M.6.b.Solid waste transfer stations

M.6.c.Solid waste incineration facilities

M.7.Utility Services Uses

**Allowed Industrial Uses****Building  
Needs Vary!!!**

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**Metals & Fabrication****Printing & Publishing****Electronics & Components****Warehousing**

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**Postal Service****Data Centers****Photographers****Waste Mgmt.**

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**But what does it all mean?****Stay Tuned!**

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## Discussion and Questions

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Puget Sound Regional Council  
PSRC

### Subarea Profile North Kent Valley: Facilities




Bldg Size (sq ft)	# of Parcels
0-5k	333
5k-200k	468
200k - 1m	568
1m+	<b>1413</b>

Bldg Age	# of Parcels
1900-1950	53
1951-2000	<b>1292</b>
2000+	245

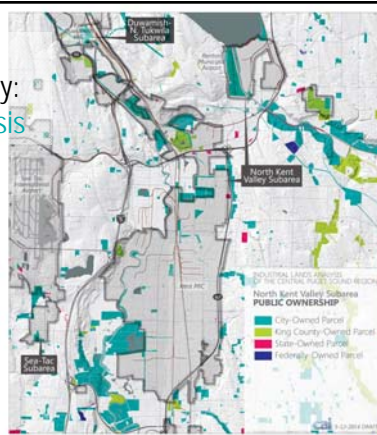
Floor Area Ratio	# of Parcels
.0-.1	<b>795</b>
.1-.5	669
.5-.75	137
.75+	27

### Subarea Profile North Kent Valley: Employment



Subarea	Non-Industrial	Industrial	Construction	Mfg	TOL	Warehousing & Wholesale	Other
405 Corridor	25,504	69,844	4,923	51,222	1,505	5,388	6,807
SW Everett	4,967	50,806	1,713	45,040	753	2,067	1,233
<b>N. KENT VALLEY</b>	<b>14,486</b>	<b>49,265</b>	<b>3,489</b>	<b>24,657</b>	<b>5,472</b>	<b>12,816</b>	<b>2,831</b>
Duwamish - N. Tukwila	27,265	48,149	6,905	21,481	6,551	8,714	4,496
S. Kent Valley	6,341	29,650	3,906	12,352	3,424	8,297	1,671
Puyallup Valley-Tacoma	8,942	21,282	2,604	7,064	2,026	6,579	3,009
Dispersed	12,175	15,844	2,977	7,624	524	3,035	1,686
Sinclair Inlet - Grish	14,013	12,636	432	11,422	236	309	237
Ballard - Interbay	22,801	10,679	1,369	6,180	1,205	1,232	693
Pierce - Lakewood	4,305	8,571	1,248	3,746	1,262	1,416	900
Sea-Tac	5,344	7,714	116	428	6,121	402	648
Arlington-Smokey Point	1,137	4,636	506	3,042	348	583	157
North-Central Everett	2,120	3,017	527	1,660	356	356	118
DuPont - Gray Field	2,219	961	88	807	17	17	33
<b>TOTAL</b>	<b>151,600</b>	<b>333,100</b>	<b>30,800</b>	<b>196,700</b>	<b>29,800</b>	<b>81,200</b>	<b>24,500</b>

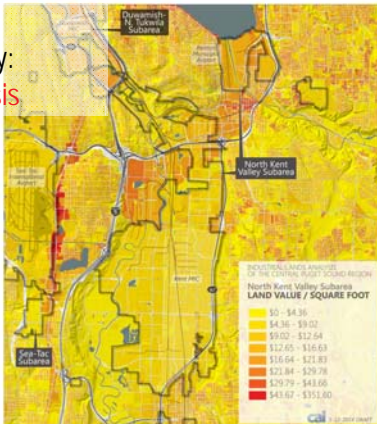
### Subarea Profile North Kent Valley: Suitability Analysis



- > Very few sites in N. Kent Subarea are publicly-owned
- > A notable exception is the Renton Municipal Airport

Source: Community Attributes; King County Dept. of Assessments

### Subarea Profile North Kent Valley: Suitability Analysis



- > Land values are predictably highest in this area along the Hwy 99 corridor running through Sea-Tac, as well as in Southcenter, and residential pockets of Renton
- > The industrial lands of N. Kent Subarea increase in value trending south to north

Source: Community Attributes; King County Dept. of Assessments

### Methodology: Defining Industrial Activity

NEED	EXAMPLES	ILLUSTRATIVE ACTIVITIES
<b>Impact</b>	>Noise >Odor	Chemical Manufacturing (NAICS 325) Paper Manufacturing (NAICS 322)
<b>Physical Assets</b>	>Rail transportation >Marine terminals	Some types of warehousing (NAICS 493)
<b>Space</b>	>Building square footage >High ceilings	Caterers (NAICS 72332) Motion Picture & Video Prod. (NAICS 33211)
<b>Physical Clustering</b> (agglomeration)	>Business-to-Business >Cooperative prod. dev.	Machinery/Eq. Rental & Leasing (NAICS 5324) Comm'l & Ind'l Equipment Repair (NAICS 8113)

