INDUSTRIAL LANDS ANALYSIS

Puget Sound Regional Council

Community Attributes Inc.

For the Central Puget Sound Region
Why study?

“The purpose of the industrial lands analysis is to understand 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.”
Key Study Questions

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?

4. How has 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?

8. What **actions, investments**, or **strategies** do stakeholders think are needed to ensure an adequate supply of industrial land?
Gross Supply of Industrial Land

71,983 gross acres of industrial-zoned lands
Changes in Industrial Land Supply

Areas with Industrial Losses
- Bellevue’s Bel-Red Corridor
- Everett’s Riverfront Redevelopment area
- Renton Landing
- SODO’s Stadium District

Areas with Industrial Additions
- Arlington
- Bremerton
- Pierce County
- Tacoma
Net Supply of Industrial Land

28,615 acres of industrial-zoned land that can accommodate future industrial growth
Contribution of Industrial Land to the Regional Economy

**Jobs:** 473,700 (27% of 1.7 million)

**Wages Paid:** $24.4 billion (23% of $105 billion)

**State Tax Revenue:** $2.2 billion (with multipliers)

![Diagram showing the distribution of jobs and wages](image-url)
Industrial Employment on Industrial Land

60% of the region’s total industrial-related sector jobs are located on industrial land.
Industrial Subareas in the Region

13 Subareas
+ Dispersed Land
Unique Assets of the Region’s Industrial Lands

- Presence of deepwater **ports**
- Proximity to China and Pacific Rim **trade hubs**
- A relatively large industrial sector within a **growing regional economy**
- **Industrial anchors** such as aerospace, maritime and life sciences employers
- Local **industrial policy** that prioritizes protection or strengthening of industrial sectors
- Availability of land **buffered** from residential uses
- Access to a **skilled workforce**
- Ease of **transportation** access
- Pre-approved, pre-permitted **land**
- A **regulatory environment** with certainty of regulations
- Established, **respected businesses** who can vouch for the permitting process
How Future Demand Meets Current Supply by Subarea

- **Strong Demand/Limited Capacity.** Includes Interbay-Ship Canal, Duwamish-North Tukwila, Kent-Renton and SeaTac-Des Moines subareas.

- **Strong Demand/Adequate Capacity.** Includes Arlington-Marysville, Frederickson-Lakewood, and Tacoma-Puyallup subareas.

- **Adequate Capacity.** Includes I-405 Corridor, North-Central Everett, Southwest Everett, and the dispersed areas in all four counties.

- **Surplus Capacity.** Includes DuPont-Gray Field, PSIC-Bremerton-Sinclair Inlet, and Auburn-Sumner subareas.
Key Findings

- Non-industrial land will continue to absorb industrial jobs, and may increasingly do so.
- Non-industrial activities can negatively impact the effectiveness of industrial land, therefore it is important to protect industrial land for heavy industrial activities, especially lands with unique assets and large infrastructure investments.
- Overall, the region appears to currently have enough industrial land to meet future demand. However, the level of adequacy varies by subarea.
- MICs are doing a good job overall in protecting industrial land.
- Many strategies for protecting industrial lands are land use policy recommendations that would be implemented locally.
Recommended Strategies to Preserve and Enhance Industrial Land

1. **Local role:** Establish or preserve policies that protect and ensure an adequate supply of land for industrial uses
   
   A. Identify and protect priority users of industrial lands
   
   B. Limit non-industrial uses on industrial land and provide adequate non-industrial land for non-industrial uses
   
   C. Increase the supply of land zoned to accommodate low-impact industrial uses
   
   D. Retain large parcels for large industrial needs
   
   E. Work with industrial businesses to improve space efficiency and land utilization
Recommended Strategies to Preserve and Enhance Industrial Land

2. **Local role:** Simplify regulations to improve permitting efficiency

3. **Local role:** Develop strategic planning frameworks for industrial areas

4. **Local role:** Take advantage of Industrial Revenue Development Bonds

5. **Regional role:** Facilitate information sharing of best practices
Recommended Strategies to Preserve and Enhance Industrial Land

6. **Regional role:** Consider study findings when updating regional designation procedures

7. **Regional role:** Continue to monitor supply and demand for industrial land

8. **Local, regional, and state role:** Align infrastructure planning with industrial land policy

9. **Local, state and federal role:** Provide support for brownfield cleanups

10. **Local, regional, state and federal role:** Provide economic development support
Thank you!

Erika Harris, PSRC
eharris@psrc.org