

Industrial Lands Study

existing conditions

january 2013

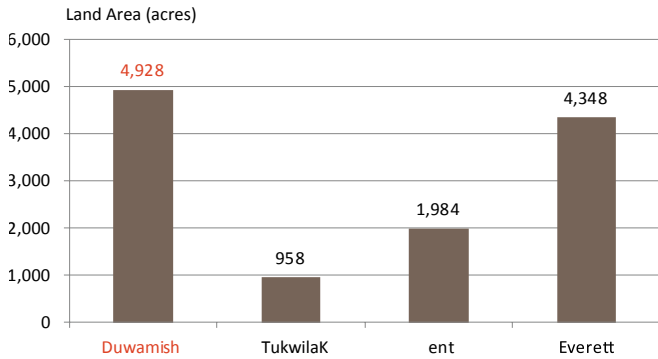
This existing conditions report is intended as a working document for the many members of the Duwamish community who share responsibility for the future of this area.

The material presented here remains in draft form. The numbers presented are from DPD's work in 2009. These numbers and the contents of the report will be subject to refinements, revisions and additions as planning continues. We hope this report provides a foundation for further discussion and conversations.

REGION

The Duwamish Manufacturing and Industrial Center (MIC) is the oldest and largest single member of a regional cluster of manufacturing and industrial uses located in eight designated centers spread across the Puget Sound region. These centers function as a regional industrial ecosystem and complement and compete with each other.

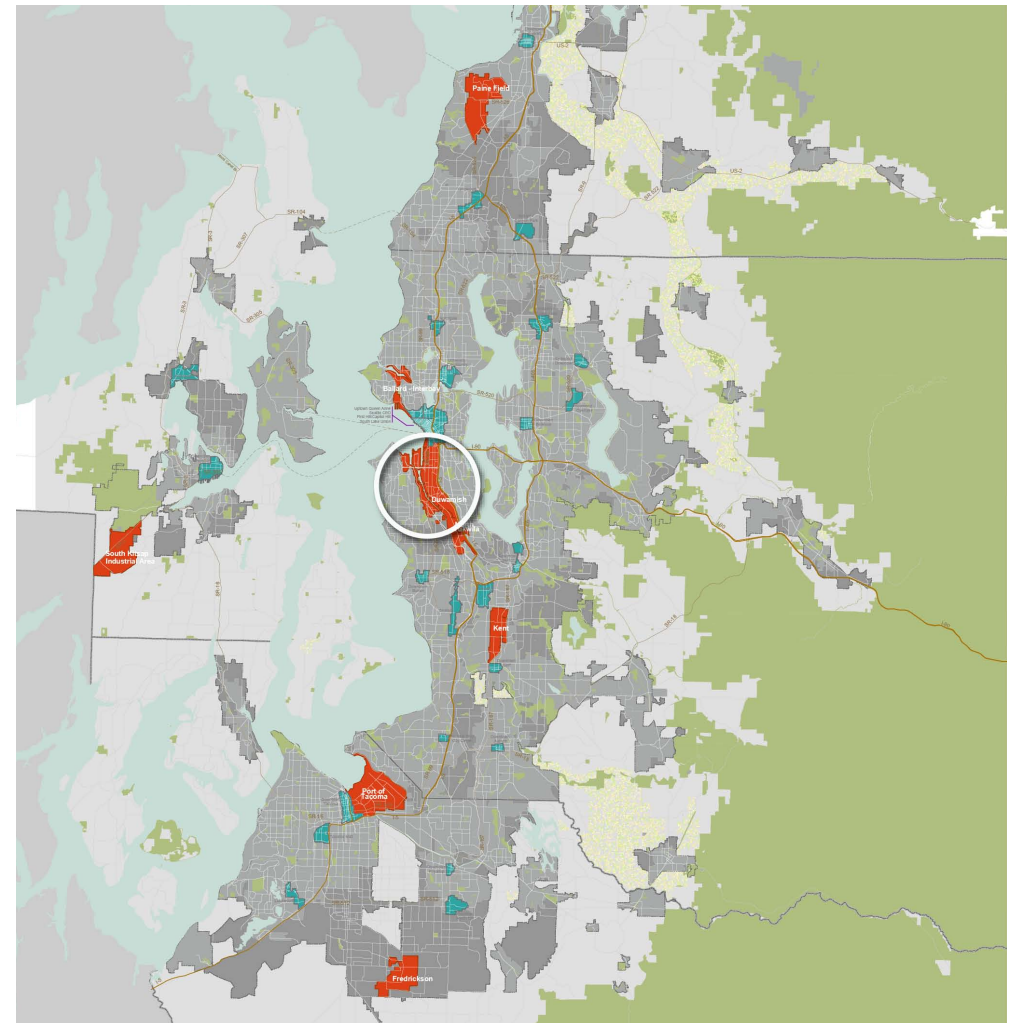
The Duwamish MIC is the northeastern end of an industrial corridor that extends from downtown Seattle south to Kent Valley. Comprised of approximately 4,928 acres of marine and industrial lands, the Duwamish MIC is a unique regional resource and economic engine.



Within the Puget Sound region, the Kent Valley has been the strongest industrial market with significant new development recently built and in the pipeline, primarily due to its supply of large vacant parcels suitable for expansion or acquisition for industrial use.

Nevertheless, the Duwamish MIC provides the largest concentration of family wage jobs in the Puget Sound region, generating enormous tax and export revenues. In 2010 this area included more than 50,000 jobs within its boundaries. The regional vacancy rate for industrial space is 6.44% but vacancy rates of Seattle area industrial space have remained below 5.00% over the past two years. The current vacancy rate is approximately 3.85% which is the lowest the market has seen in recent history.

There are differences in distribution of jobs among the MICs in the region. Jobs in the Duwamish are evenly split between manufacturing, warehousing/utilities and services.



Jobs

Totals by MIC

Duwamish
53,444

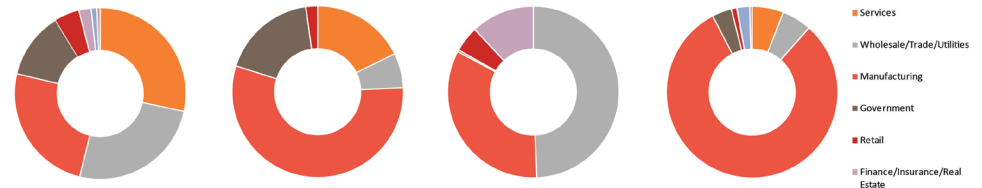
Tukwila
13,181

Kent
12,446

Everett
42,411



Jobs by Sector



Source of numbers: PSRC

<http://www.psrc.org/about/boards/gmpb/gmpb-presentations/>
and Colliers Puget Sound Region Research and Forecast Report, Q3 2012, Industrial

SEATTLE

Land Use/Real Estate

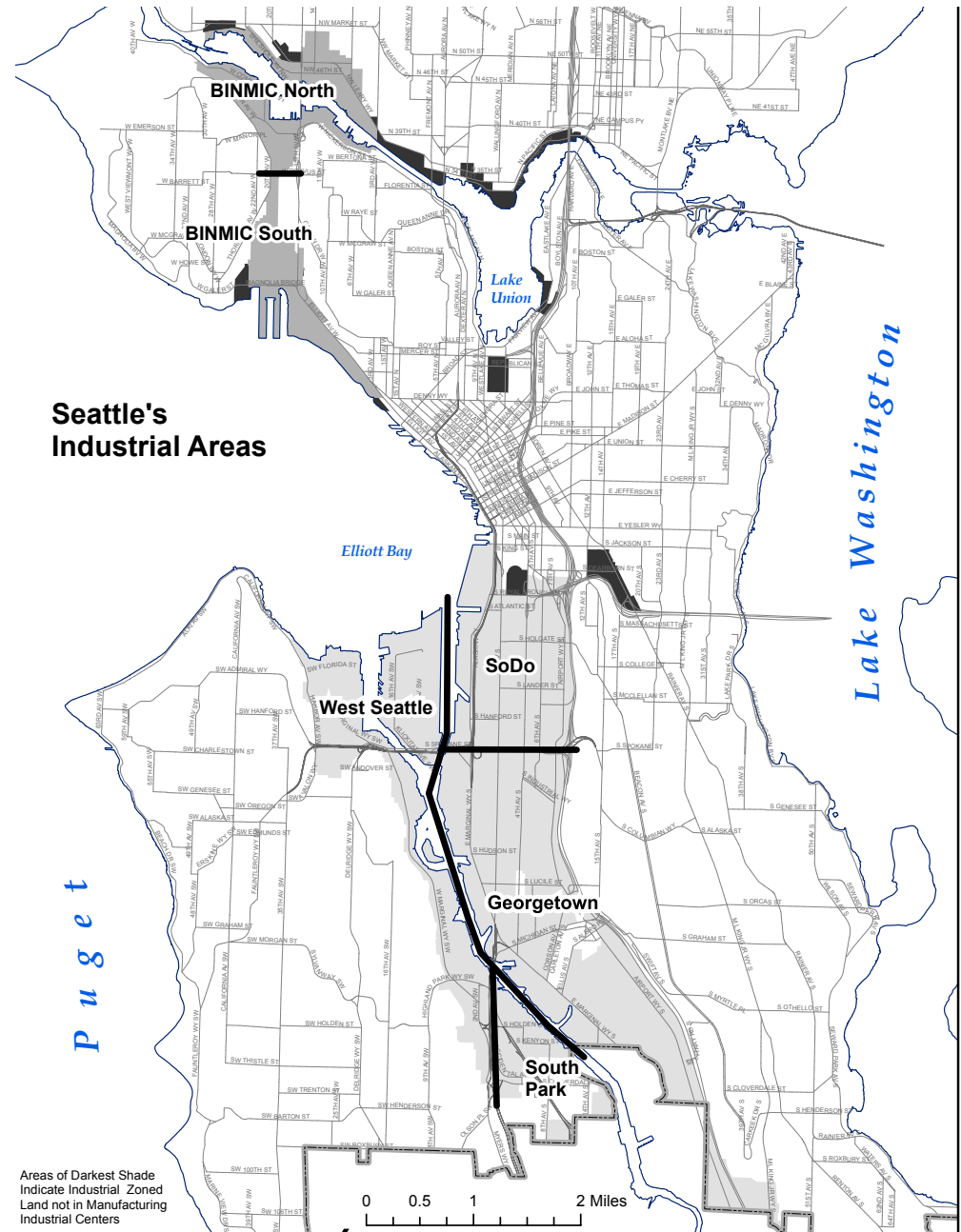
- 5,142 acres of land zoned industrial in Seattle or 12% of the total land area.
- 4,928 acres of land in the Duwamish Manufacturing/Industrial Center (SoDo, Georgetown, South Park, West Seattle – in light gray on the map to the right).
- 37% of industrially zoned land is in communication, utility or transportation uses.
- 19% of industrially zoned land is in manufacturing uses.
- 16% of industrially zoned land is in warehousing uses.
- 10% of industrially zoned land is in commercial uses.
- There is nearly 70 million square feet of privately owned leasable industrial building space within the City of Seattle.
- 47% of industrially zoned land is owned by public entities.

Port Facilities

- The Port of Seattle maintains facilities on 1,500 acres along the northern and southern shores of Elliott Bay, along the Duwamish waterway, and in Interbay and Ballard along the Lake Washington Ship Canal - including 4 container, 3 breakbulk, and 2 cruise ship terminals.
- The Port of Seattle operates the Fisherman's Terminal in the Ship Canal. Home base to the 700 ship North Pacific fishing fleet.

Highways

- Interstate 5 runs along the eastern edge of the Duwamish M/IC with several points of direct access.
- Interstate 90 runs east from the northeast corner of the Duwamish M/IC.
- State Route 99 runs north/south through the Duwamish M/IC along the Duwamish waterway into downtown Seattle and continues up through North Seattle and south to SeaTac International Airport.
- The Spokane Street Viaduct bisects the Duwamish M/IC east/west and connects West Seattle and the West Seattle Bridge to State Route 99 and Interstate 5.
- 15th Avenue W and 15th Avenue NW is the main route in BINMIC connecting the area to Homan Road and State Route 99 in the north and Denny Way to Interstate 5 in the south.
- State Route 509 connects South Park to downtown Seattle to the north and SeaTac International Airport to the south.



Areas of Darkest Shade indicate Industrial Zoned Land not in Manufacturing Industrial Centers

Rail Facilities

- BNSF owns and operates two rail yards in Seattle – one located in BINMIC and the other located in the Duwamish. Union Pacific railway also operates a rail yard in the Duwamish in the Georgetown area.
- Amtrak provides passenger rail service to Seattle with a passenger facility at King Street Station and other facilities in the Duwamish near the stadiums.

Airport Facilities

- King County owns and operates Boeing Field at the southern edge of the city. The field is a general service airport serving a wide variety of uses from Boeing to cargo to charter flights.

Transit

- The industrial areas are served by Metro as part of county-wide bus service.
- Metro has a bus base located at Royal Brougham between 4th Avenue South and the Link light rail route.
- Sound Transit Link light rail system that runs from downtown Seattle to SeaTac International airport runs through SoDo with stations at South Lander Street & 5th Avenue South and Royal Brougham Way & 5th Avenue South.
- The main Link light rail operations and maintenance base is located in the SoDo neighborhood.

Public Facilities

- Federal Center South office building on East Marginal Way South.
- Safeco Field.
- Seattle School District Headquarters.

SODO

The SoDo neighborhood lies immediately south of Downtown Seattle and is one of four areas that make up the Duwamish Manufacturing and Industrial Center. SoDo is the location for Starbucks's international headquarters, several of the Port's largest piers, rail switching yards for BNSF and Amtrak, maintenance and storage facilities for Metro buses and the Link light rail, and a rich variety of retail and wholesale outlets that cater to industrial and consumer customers.

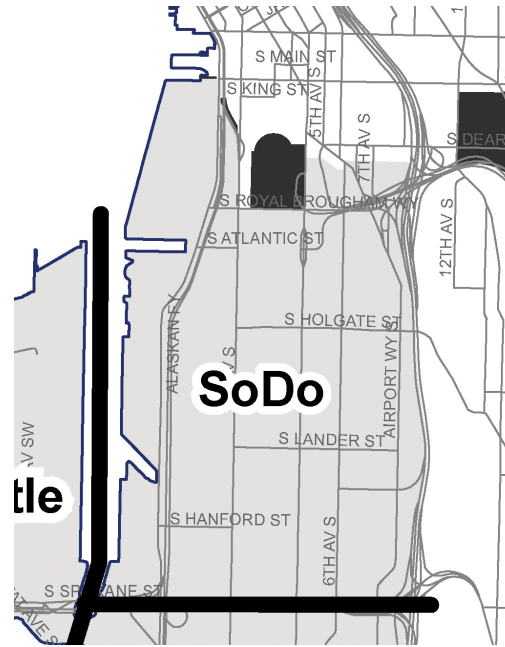
The area is bound by the Duwamish River on the west, Spokane Street Viaduct on the south, I-5 on the east and the Pioneer Square and Chinatown/International District downtown neighborhoods on the north. Safeco Field is on the northern edge of this neighborhood.

SoDo covers almost 800 acres with nearly 60% of the area in public or railway ownership. This, of course, reflects the Port, BNSF, stadium, and County and regional transit facilities all located in the area.

Land Use Changes (1996-2006)

Of the permits issued in this neighborhood between 1996 and 2006, 22% were for a change from industrial use to another use. However, 42% of the permits issued for this area during this time period were for one industrial use replacing another industrial use.

Despite the large amount of property in public ownership in this area, assessed values of property are high. SoDo is probably the most familiar industrial area to most Seattleites because of its high-profile businesses,



Areas in gray represent industrial land in a M/IC. Areas in black are industrially zoned land outside of a M/IC.

easily seen physical location from downtown and area highways, as well as being the location for several major retailing establishments.

Comments from 2007 Survey of Industrial Businesses

The list of companies and their areas of business is widely varied and reflects the high-value, hybrid types of industries that are located here. Proximity and convenience to customers is clearly the neighborhood's strength in retaining business in this historic industrial area. Transportation, particularly the increase of traffic and conflicts between modes of transportation, is a concern in this neighborhood.

Land Area by Land Use

Land Use	Acres
Residential	0
Mixed Use	1.1
Entertainment	14.8
Hotel/Motel	0
Office	23.2
Retail/Service	56.0
Public Facilities	6.5
Schools	0
Institutions	0
Manufacturing	89.3
Comm./Util./Trans. Facilities	308.7
Warehouse	155.5
Parking	44.6
Open Space	0
Easement	1.4
Vacant	67.2
Water Body	0
Unknown	6.4
Total	774.7

Average Building Size by Land Use

Land Use	Square Feet
Mixed Use	130,624.0
Entertainment	1,718,000.0
Hotel/Motel	0
Office	42,498.9
Retail/Service	19,324.9
Public Facilities	34,201.7
Schools	0
Institutions	0
Manufacturing	35,339.5
Comm./Util./Trans. Facilities	35,870.7
Warehouse	39,469.1
Parking	366,105.5
Vacant	16,902.0
Average Parcel Size (in acres)	1.42
Median Parcel Size (in acres)	.52

Public & Railroad Land Ownership

Ownership	Acres
Federal	9.7
State	13.8
King County	41.5
City of Seattle	27.7
Port of Seattle	181.7
Sound Transit	20.0
Other	29.4
Railroad	122.3
<i>Total in Public & RR Ownership</i>	<i>446.1</i>
<i>Total Land Area</i>	<i>774.7</i>
Percent in Public & RR Ownership	58%

Average Assessed Values

	Total Building and Land Values
Mixed Use	\$ 5,031,600
Entertainment	0
Hotel/Motel	0
Office	2,886,617
Retail/Service	1,187,303
Schools	0
Institutions	0
Manufacturing	1,817,277
Comm./Util./Trans. Facilities	5,148,848
Warehouse	2,116,424
Parking	2,685,932
Vacant	505,667

GEORGETOWN

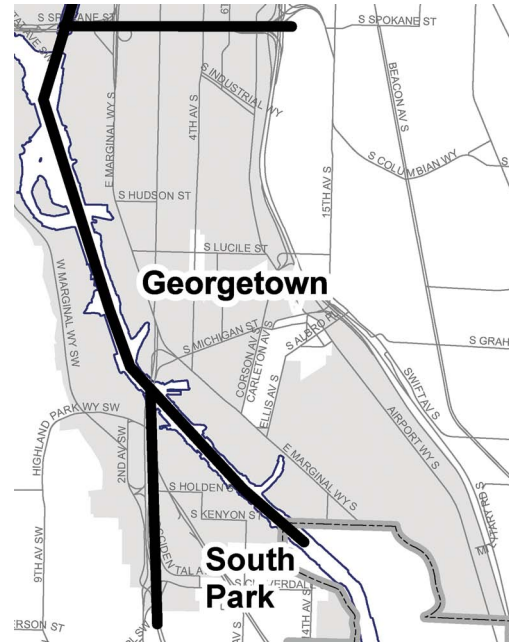
The portion of the Duwamish industrial area that lies south of the Spokane Street Viaduct is one of four areas that make up the Duwamish Manufacturing and Industrial Center (MIC). It is home to many water-dependent, large- and small-scale industrial uses.

The area is bounded by the Duwamish River on the west, I-5 on the east, Spokane Street Viaduct on the north, and the City limits and Boeing Field on the south and is bisected by a BNSF railroad yard. The residential, commercial Georgetown neighborhood is surrounded by the MIC in the southern portion of the area.

The Georgetown area covers over 1,750 acres. 50% of those acres are in public or railroad ownership reflecting the presence of the BNSF railroad yard and Boeing Field owned and operated by King County. Nonetheless, 80% of the area is in some sort of industrial use, either manufacturing, warehousing, communication, utility, or transportation facilities. Another 13% is recorded by the King County Tax Assessor's office as vacant, leaving very little acreage in any other use.

Land Use Changes (1996-2006)

Of the permits issued in this neighborhood between 1996 and 2006, 4% were for a change from industrial use to another use. This area, due to its large geographic size and number of businesses, saw the highest level of permitting activity – yet it had the second fewest number of conversions from industrial use. The loss was more than countered by four times the number of conversions to industrial uses.



Areas in gray represent industrial land in a MIC.

The assessed values of properties in this area are evenly distributed reflecting the network of industrial activities and the business who serve them intermeshed in a solid industrial neighborhood.

Comments from 2007 Survey of Industrial Businesses

The businesses in this area cover a broad range of industrial enterprises reflecting the economic vitality and vibrancy of Seattle's industrial community. Almost all the survey respondents indicated that access and proximity to customers and suppliers were the main advantage in being located in this area – with traffic/congestion mentioned by many as a growing concern along with infrastructure maintenance.

Land Area by Land Use

Land Use	Acres
Residential	6.7
Mixed Use	.5
Entertainment	0
Hotel/Motel	1.7
Office	21.9
Retail/Service	44.4
Public Facilities	1.6
Schools	4.2
Institutions	1.3
Manufacturing	339.1
Comm./Util./Trans. Facilities	652.2
Warehouse	403.1
Parking	20.0
Open Space	6.6
Easement	.4
Vacant	245.1
Water Body	0
Unknown	7.1
Total	1,756.1

Average Building Size by Land Use

Land Use	Square Feet
Mixed Use	8,932.0
Entertainment	0
Hotel/Motel	10,985.8
Office	13,044.7
Retail/Service	17,174.3
Public Facilities	8,598.0
Schools	58,563.5
Institutions	15,526.0
Manufacturing	57,245.4
Comm./Util./Trans. Facilities	177,276.7
Warehouse	43,160.4
Parking	11,924.0
Vacant	5,549.5
Average Parcel Size (in acres)	1.97
Median Parcel Size (in acres)	.50

Public & Railroad Land Ownership

Ownership	Acres
Federal	38.7
State	36.9
King County	462.1
City of Seattle	56.8
Port of Seattle	62.2
Sound Transit	0
Other	6.1
Railroad	230.3
<i>Total in Public & RR Ownership</i>	<i>893.1</i>
<i>Total Land Area</i>	<i>1,756.1</i>
Percent in Public & RR Ownership	51%

Average Assessed Values

	Total Building and Land Values
Mixed Use	412,450
Entertainment	0
Hotel/Motel	1,176,825
Office	1,166,569
Retail/Service	1,395,656
Schools	0
Institutions	1,285,700
Manufacturing	3,020,504
Comm./Util./Trans. Facilities	3,115,086
Warehouse	2,349,148
Parking	461,948
Vacant	868,520

Land Area by Land Use

Land Use	Acres
Residential	9.1
Mixed Use	0
Entertainment	.4
Hotel/Motel	0
Office	4.4
Retail/Service	15.1
Public Facilities	0
Schools	0
Institutions	0
Manufacturing	89.6
Comm./Util./Trans. Facilities	35.2
Warehouse	56.0
Parking	.6
Open Space	1.0
Easement	0
Vacant	24.6
Water Body	0
Unknown	2.2
Total	238.2

Average Building Size by Land Use

Land Use	Square Feet
Mixed Use	0
Entertainment	0
Hotel/Motel	0
Office	3,015.1
Retail/Service	6,084.4
Public Facilities	0
Schools	0
Institutions	0
Manufacturing	23,271.6
Comm./Util./Trans. Facilities	17,060.0
Warehouse	20,460.2
Parking	0
Vacant	2,592.0
Average Parcel Size (in acres)	.72
Median Parcel Size (in acres)	.23

Public & Railroad Land Ownership

Ownership	Acres
Federal	0
State	0
King County	20.7
City of Seattle	13.9
Port of Seattle	0
Sound Transit	0
Other	0
Railroad	0
<i>Total in Public & RR Ownership</i>	<i>34.6</i>
<i>Total Land Area</i>	<i>238.2</i>
Percent in Public & RR Ownership	15%

Average Assessed Values

	Total Building and Land Values
Mixed Use	\$ 0
Entertainment	212,700
Hotel/Motel	0
Office	419,511
Retail/Service	730,432
Schools	0
Institutions	0
Manufacturing	1,323,745
Comm./Util./Trans. Facilities	858,960
Warehouse	1,360,398
Parking	155,600
Vacant	180,546

WEST SEATTLE

The portion of the Duwamish Manufacturing and Industrial Center west of the Duwamish River is heavily tied to Port and waterfront activities. Harbor Island houses major Port activities as does most of the area at the mouth of the Duwamish River. Along the river bank are large transportation and water-dependent businesses. In addition, Seattle's last steel mill is located at the western approach to the West Seattle Bridge.

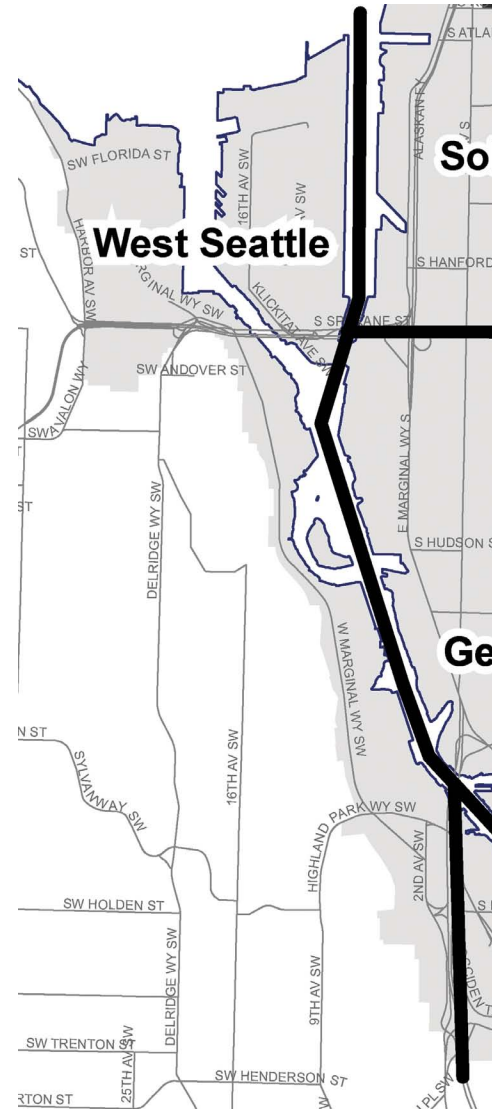
The area is bounded by Elliott Bay on the north, the Duwamish River on the east, the Delridge Greenbelt on the west and the South Park industrial neighborhood on the south. The area is bisected by the West Seattle Bridge, the main transportation artery connecting the West Seattle neighborhood to the rest of Seattle.

The major land use of the area is in communication, utility, and transportation facilities – representing the Port of Seattle activities. The land-intensive use of these activities has left little room for other types of uses.

Land Use Changes (1996-2006)

Of the permits issued in this neighborhood between 1996 and 2006, 16% were for a change from an industrial use to another use. During the same time period 20% were from another use changing to an industrial use.

The sizeable public ownership of the land in this area represents the large presence of Port of Seattle facilities.



Areas in gray represent industrial land in a M/IC.

Comments from 2007 Survey of Industrial Businesses

Proximity to transportation and water access were cited as advantages to being located in this area. Some issues with freight mobility and water freight mobility were mentioned, as was concern over the impact of Alaskan Way Viaduct decisions.



Land Area by Land Use

Land Use	Acres
Residential	2.5
Mixed Use	0
Entertainment	3.0
Hotel/Motel	0
Office	6.9
Retail/Service	11.6
Public Facilities	.4
Schools	0
Institutions	0
Manufacturing	285.5
Comm./Util./Trans. Facilities	512.0
Warehouse	55.3
Parking	1.2
Open Space	.1
Easement	0
Vacant	139.9
Water Body	2.7
Unknown	2.6
Total	1,023.8

Average Building Size by Land Use

Land Use	Square Feet
Mixed Use	0
Entertainment	35,791.5
Hotel/Motel	0
Office	50,406.4
Retail/Service	11,987.9
Public Facilities	4,676.0
Schools	0
Institutions	0
Manufacturing	66,893.7
Comm./Util./Trans. Facilities	139,836.9
Warehouse	39,700.3
Parking	0
Vacant	1,730.0
Average Parcel Size (in acres)	2.39
Median Parcel Size (in acres)	.36

Public & Railroad Land Ownership

Ownership	Acres
Federal	0
State	8.4
King County	2.1
City of Seattle	41.2
Port of Seattle	554.9
Sound Transit	0
Other	.9
Railroad	22.6
<i>Total in Public & RR Ownership</i>	<i>641.9</i>
<i>Total Land Area</i>	<i>1,023.8</i>
Percent in Public & RR Ownership	63%

Average Assessed Values

	Total Building and Land Values
Mixed Use	\$ 0
Entertainment	10,309,200
Hotel/Motel	0
Office	6,362,175
Retail/Service	716,371
Schools	0
Institutions	0
Manufacturing	4,212,796
Comm./Util./Trans. Facilities	2,397,450
Warehouse	1,855,426
Parking	95,500
Vacant	258,532

POLICY

The State's Growth Management Act requires that development regulations be consistent with a hierarchy of policies. King County's Countywide Planning Policies (as approved by all jurisdictions in the county) and the City's Comprehensive Plan outline the City's direction about where and how it will encourage or discourage particular activities.

These policy documents describe the ways in which the County and the City plan to accommodate expected employment and housing growth. Both documents highlight the importance of creating and retaining manufacturing/industrial employment centers as key components of the economy.

Seattle's Comprehensive Plan

The City of Seattle's Comprehensive Plan (Comp Plan) includes the following goals for industrial areas:

- Provide opportunities for industrial activity to thrive in Seattle.
- Accommodate the expansion of existing businesses within Seattle, thereby stabilizing the city's existing industrial areas. Promote opportunities for new businesses that are supportive of the goals for industrial areas.
- Preserve industrial land for industrial uses and protect viable marine and rail-related industries from competing with non-industrial uses for scarce industrial land. Give special attention to preserving industrial land adjacent to rail or water-dependent transportation facilities.
- Promote high-value-added economic development by supporting growth in the industrial and manufacturing employment base.
- Give adequate attention to the needs of industrial activity while reducing major land use conflicts between industrial development and abutting residential or pedestrian-oriented commercial areas, and avoid placing unnecessary restrictions on manufacturing uses.
- Restrict or prohibit uses that may negatively affect the availability of land for industrial activity, or that conflict with the character and function of industrial areas.
- Prevent incompatible activities from locating in close proximity to each other.
- Accommodate a mix of diverse, yet compatible, employment activities in Seattle's industrial areas.

The Comp Plan's future land use map designated several Industrial Areas, which encompass the two Manufacturing/Industrial Centers (M/ICs) and other industrial-zoned land in the city. Seattle's industrial land use policy and zoning was established long before the 1995 adoption of Countywide Planning Policies' (CPP) goals and criteria for manufacturing/industrial centers. When Seattle used the CPP criteria to designate its two largest clusters of industrially zoned land as M/ICs (Duwamish and BINMIC), smaller areas of industrial zoning remained outside of the M/ICs.

The current Comp Plan policies do not make significant distinctions between industrial zones inside and outside the M/ICs. For instance, residential uses are prohibited and certain commercial uses are limited in all industrial zones. One difference is that the Comprehensive Plan establishes targets for employment growth in M/ICs, but not for the other industrial areas.

Establishment of Manufacturing/Industrial Centers

King County's Countywide Planning Policies identify four manufacturing/industrial centers. Within the geographic boundaries of these centers, policies promote the preservation and aggregation of land parcels for manufacturing and industrial uses and also discourage other land uses which are not compatible with manufacturing and industrial activities.

Two of the four centers are located in Seattle – the Duwamish Manufacturing/Industrial Center (Duwamish) and the Ballard Interbay Northend Manufacturing/Industrial Center (BINMIC). The Duwamish and BINMIC comprise more than 10 percent of Seattle's land area. The BINMIC covers 866 acres and the Duwamish measures 3,981 acres. An additional 295 acres is zoned industrial in Seattle outside of the two centers. King County's other two M/ICs are located in Tukwila and Kent. Tukwila's M/IC abuts Seattle's Duwamish M/IC on the south.

Seattle's Comp Plan indicates that the city's M/ICs are intended to:

- Ensure that adequate accessible industrial land remains available to promote diversified employment base and sustain Seattle's contribution to regional high-wage job growth.
- Promote the use of industrial land for industrial purposes.
- Encourage economic activity and development in Seattle's industrial areas by supporting the retention and expansion of existing industrial businesses and by providing opportunities for the creation of new businesses consistent with the character of industrial areas.

- Promote manufacturing and industrial employment growth.
- Strive to retain and expand existing manufacturing and industrial activity.
- Maintain land that is uniquely accessible to water, rail, and regional highways for continued industrial use.

The City's broader umbrella of policies for industrial areas provides additional opportunities for industrial activity to thrive in Seattle. These policies are intended to:

- Preserve industrial land for industrial uses and protect viable marine and rail-related industries from competing with non-industrial uses for scarce industrial land.
- Reduce major land use conflicts between industrial development and abutting residential or pedestrian-oriented commercial areas and prevent incompatible activities from locating in close proximity to each other.
- Restrict or prohibit uses that may negatively affect the availability of land for industrial activity.
- Consider high value-added, living wage industrial activities to be a high priority.
- Permit commercial uses in industrial areas to the extent that they reinforce the industrial character.

Neighborhood Planning

The Duwamish adopted a neighborhood plan in 1999, and included the following policies:

- Preserve land in the Duwamish M & I Center for industrial activities such as manufacturing, warehousing, marine uses, transportation, utilities, construction and other related industrial sectors.
- Discourage non-industrial uses.
- Maintain the existing M&I Center boundaries.
- Separate industrial processes and functions from residences and the general public.
- Address the impacts of sports/exhibition facilities.
- Within 200 feet of the Duwamish waterway shoreline, water dependent and industrial uses shall be the highest priority in the Land Use Code and Master Program.
- Preserve a working industrial waterfront that retains and expands the value of the Duwamish Waterway as a vital resource that provides important local family-wage job base and economic growth for the City County, region and State.

The Plan also included recommendations about the transportation infrastructure as well as about City utilities and the permit process for industrial projects. One outcome of the neighborhood planning process in the Duwamish was to amend the Land Use Code to prohibit certain uses that were permitted in other industrial zones, and to impose lower size-of-use limits for office and retail uses.

REGULATIONS

Zoning

The City of Seattle has established four industrial zone classifications in its Land Use Code. There are differing density or size limits on office and retail uses in each of the industrial zones while almost all residential uses are prohibited in all of them.

General Industrial 1 (IG1)

The purpose of the IG1 zone is to protect marine and rail-related industrial areas from an inappropriate level of unrelated retail and commercial uses by limiting these uses to a density or size limit lower than that allowed for industrial uses.

Permitted land uses include general and heavy manufacturing, commercial uses subject to some limits, high impact uses as a conditional use, institutional uses in existing buildings, entertainment uses, transportation and utility services, and salvage and recycling uses.

Maximum size of use for retail sales and service and entertainment uses except spectator sports facilities is 30,000 square feet. Office uses are limited to 50,000 square feet. The floor area ratio (FAR) is 1 for non-industrial uses and 2.5 for industrial uses. (See tables on page 11.)

General Industrial 2 (IG2)

The intent of the IG2 zones is to allow a broad range of uses where the industrial function of an area is less established than in IG1 zones, and where additional commercial activity could improve employment opportunities and the physical condition of the area, without conflicting with industrial activity.

Permitted land uses are similar to those in IG1.

Maximum size of use for retail sales and service and entertainment uses except spectator sports facilities is 75,000 square feet. Office uses are limited to 100,000 square feet. The FAR is 2.5 for both non-industrial and industrial uses. (See tables on page 11.)

Industrial Buffer (IB)

The intent of the Industrial Buffer zone is to provide an appropriate transition between industrial areas and adjacent residential zones, or commercial zones having a residential orientation and/or a pedestrian character.

Permitted land uses include light and general manufacturing, commercial uses subject to some limits, some transportation services, entertainment uses, institutions general in existing buildings, and salvage and recycling uses.

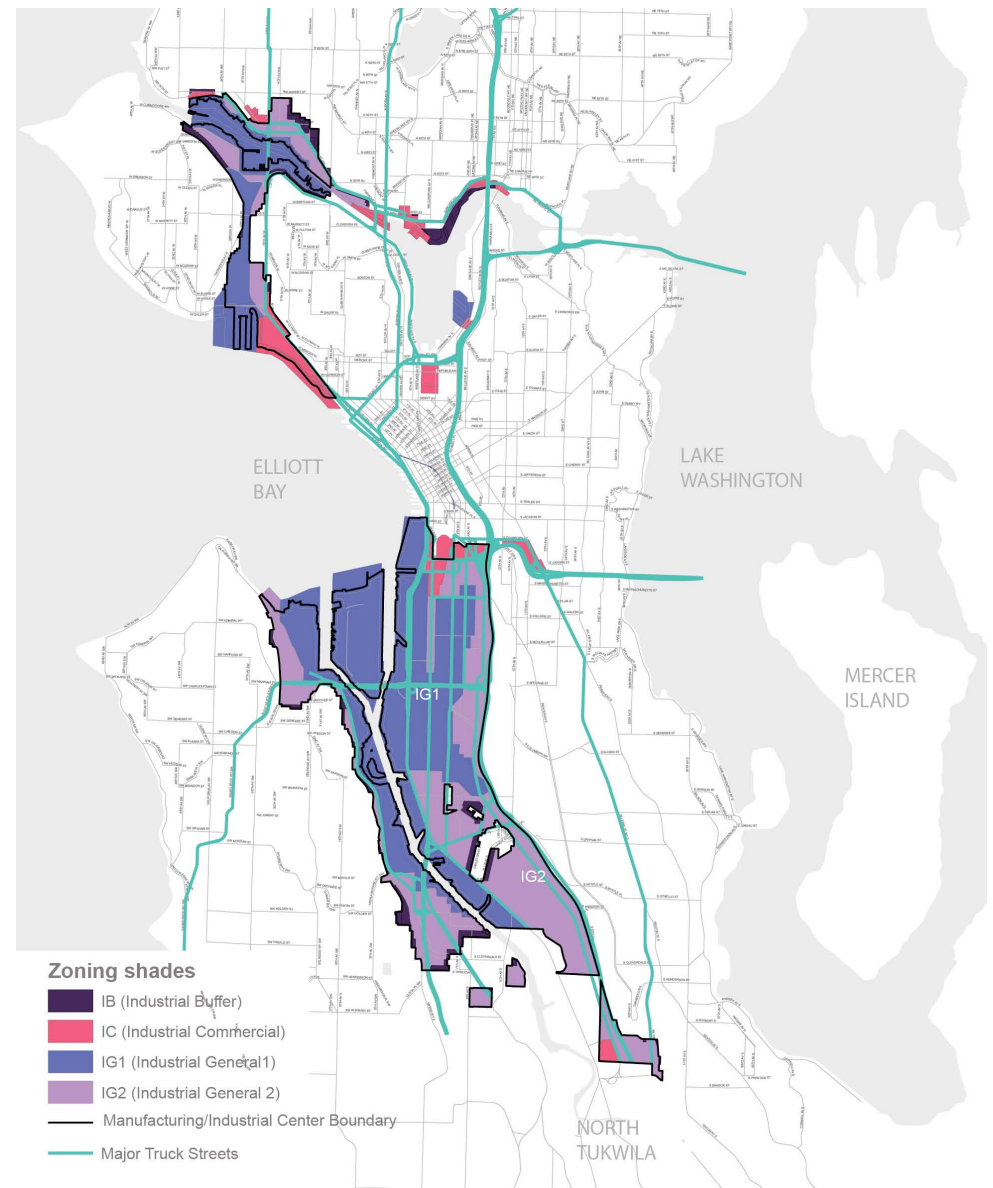
Maximum size of use for retail sales and service and entertainment uses except spectator sports facilities is 75,000 square feet. Office uses are limited to 100,000 square feet. The FAR is 2.5 for both non-industrial and industrial uses. There are additional regulations and restrictions in regard to setbacks, screening and landscaping, access to parking and loading, major odor sources, and light and glare when the industrial uses are adjacent to residential areas. (See tables on page 11.)

Industrial Commercial (IC)

The intent of the Industrial Commercial zone is to promote development of businesses which incorporate a mix of industrial and commercial activities, including light manufacturing and research and development, while accommodating a wide range of other employment activities.

Permitted land uses include light and general manufacturing, commercial uses, transportation facilities, entertainment, institutions generally in existing buildings, utilities, and salvage and recycling uses.

Maximum size of use for retail sales and service and entertainment uses except spectator sports facilities is 75,000 square feet. There are no limits on office uses. The FAR is 2.5 (or 3 in South Lake Union and the Stadium Transition zones.) There are additional regulations and restrictions in regard to setbacks, screening and landscaping, access to parking and loading, major odor sources, and light and glare when the industrial uses are adjacent to residential areas. (See tables below.)



**Table A for 23.50.027
Size of Use Limits in Industrial Zones**

Uses Subject to Size Limits	IG1	IG2	IB	IC Outside the Duwamish MIC	IC Within the Duwamish MIC
Animal Shelters and Kennels*	10,000 sq. ft.	10,000 sq. ft.	75,000 sq. ft.	75,000 sq. ft.	N.S.L., except 75,000 sq. ft. in IC 85-160 zone
Drinking establishments**	3,000 sq. ft.	3,000 sq. ft.	N.S.L.	N.S.L.	N.S.L.
Entertainment*	10,000 sq. ft.	10,000 sq. ft.	75,000 sq. ft.	75,000 sq. ft.	N.S.L., except 75,000 sq. ft. in IC 85-160 zone
Lodging Uses*	10,000 sq. ft.	10,000 sq. ft.	75,000 sq. ft.	75,000 sq. ft.	N.S.L., except 75,000 sq. ft. in IC 85-160 zone
Medical Services*	10,000 sq. ft.	10,000 sq. ft.	75,000 sq. ft.	75,000 sq. ft.	N.S.L., except 75,000 sq. ft. in IC 85-160 zone
Office	10,000 sq. ft.	25,000 sq. ft.	100,000 sq. ft.	N.S.L.	N.S.L.
Restaurants	5,000 sq. ft.	5,000 sq. ft.	N.S.L.	N.S.L.	N.S.L.
Retail Sales, Major Durables	10,000 sq. ft.	25,000 sq. ft.	75,000 sq. ft.	75,000 sq. ft.	N.S.L., except 30,000 sq. ft. in IC 85-160 zone
Sales and Services, Automotive	10,000 sq. ft.	25,000 sq. ft.	75,000 sq. ft.	75,000 sq. ft.	N.S.L.
Sales and Services, General	10,000 sq. ft.	25,000 sq. ft.	75,000 sq. ft.	75,000 sq. ft.	N.S.L., except 30,000 sq. ft. in IC 85-160 zone

Key for Table A for 23.50.027

N.S.L. = No Size Limit

*Where permitted under Table A for 23.50.012.

**The size limit for brew pubs applies to that portion of the pub that is not used for brewing purposes.

Environmentally Critical Areas

Environmentally critical areas (ECAs) include the City's shorelines, wetlands, creeks, geologic hazard areas (such as landslide-prone, seismic and volcanic hazard areas), flood-prone areas, and abandoned landfills. The ECA regulations address how development on and adjacent to these areas is regulated. The ECAs most common to industrial zones are seismic hazard areas, due to liquefaction prone soils, and shoreline habitat areas.

The seismic hazard ECA regulations address the risk associated with poor soil conditions. Certain soil types, often associated with areas of fill, can liquefy during an earthquake thereby causing building failure. This is the predominant condition in much of the Duwamish MIC. To mitigate this risk, additional building code standards may be applied to construction project in these locations.

The shoreline habitat ECA is the area 100 feet landward from the ordinary high water mark for all shoreline areas. These areas are designated as ECAs to help protect critical habitat for a number of marine and terrestrial species. This includes the shoreline of the Duwamish River and the Lake Union Ship Canal where much of Seattle's industrial base is located.

Development related to water dependent and water-related uses are allowed within the ECA. However, if there is harm to the ecological function of the critical area, such as through the removal of vegetation or an increase in impervious surface, mitigation is required. For non water dependent and water-related uses there may be a required 25 foot building setback from the ordinary high water mark requirement. As most of the sites in the industrial areas are paved and have little vegetation, there is little impact to maritime related industry as a result of these regulations.

Shoreline Master Program

To carry out its responsibilities under the State Shoreline Management Act, Seattle has adopted a Shoreline Master Program (SMP) to protect shoreline habitat, provide public access to the shoreline and ensure appropriate use of the shoreline. The SMP consists of policies in the Comp Plan and development regulations in the Land Use Code. These regulations apply to land within two hundred feet of the shoreline and they vary by environments (or overlays) that describe the permitted uses and other restrictions. For instance, much of the land within the M/ICs along the Duwamish waterway or the Lake Washington Ship Canal is in the SMP's Urban Industrial environment that prohibits most non-water dependent uses.

On most shoreline within the city, mitigation is required on-site as a condition of project approval. Through the City's Shoreline Alternative Mitigation Plan, however, developers of industrial projects on shorelines located along the Ship Canal have the

option of providing mitigation on-site or off-site through a fee-in-lieu program. SAMP uses a standardized method of measuring project impacts and determining mitigation to ensure that as projects are developed there is no net loss of shoreline ecological function. Impacts and mitigation are measured in terms of 'habitat units' which can be used to measure impacts and mitigation benefits across sites. Benefits to industrial users of this approach include a timely and predictable permit process, greater consistency in impact evaluation, and the potential to have greater site flexibility by providing mitigation at another location.

Existing Commercial Uses in Industrial Zones

The Seattle Municipal Code permits some non-industrial uses in industrial zones, subject to size of use limits. Currently, two sets of size of use limits apply to industrial zones. The first set applies to all of the industrial zones while the second set applies to IG1 and IG2 zones in the Duwamish M/IC. Size of use limits for all industrial zones apply to office and retail uses. In the Duwamish a different set of size of use limits apply to retail, restaurants, drinking establishments and meeting halls.

Of the 4,165 parcels total in the Duwamish M/IC there are 310 parcels with primary office uses with an average size of 12,000 square feet. Six of these uses located in the IG1 zone exceed the size of use limit of 50,000 square feet. Two in the IG2 zone exceed the zone's office size of use limit of 100,000 square feet. There are 79 retail and related establishments with the average size of a retail establishment under 2,500 square feet. Four of the retail uses in the IG1 zone exceed the size of use limit of 25,000 square feet and one retail establishment in the IG2 zone exceeds the size of use limit of 50,000 square feet.

In the BINMIC, there are 1,575 parcels total with 125 parcels with primary office uses, also with an average size of approximately 12,000 square feet. Nine of these uses in the IC zone exceed the zone's size of use limit of 50,000 square feet. There are 61 retail and related uses with an average size of approximately 1,800 square feet. Of these, one retail use in the IG2 zone exceeds the 75,000 square foot size of use limit.

Source: DPD Seattle's Industrial Lands: Background Report (May 2007)



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