



Interbay Industrial Lands Meeting

March 11, 2015

- Recap of 2013 Land Use Corridor Study
- Local Production Study
- Proposed New Industrial Lands Policies

2013 Land Use Study: Purpose

- Address Comp. Plan amendment requests
- Mix and balance of land uses
- Potential development related to transit investments
- Opportunities for an improved public realm



2013 Outreach

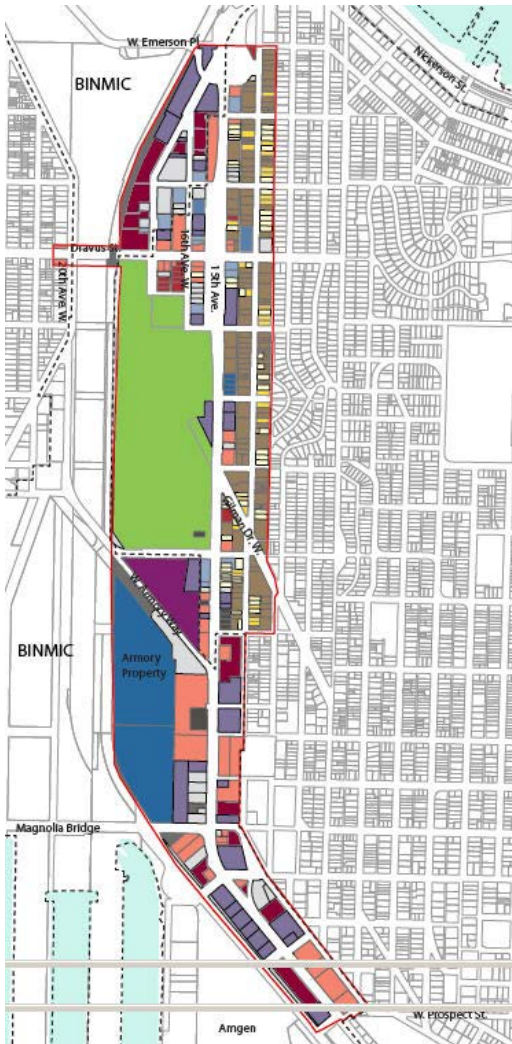
- Website & listserve
- Working Group
- Briefings
- Small business chats
- Media
- Walking Tour
- Community Meeting
4/29/13.



2013 Stakeholder Concerns

- Traffic congestion & freight mobility
- Connections to Magnolia
- More affordable workforce housing
- Retail to serve adjacent communities
- Living wage / industrial jobs
- Coordinate with other planning studies

2013 Data Collection & Observation



2013 Alternatives

Industrial / Commercial Corridor

- Maintain protection of industrial lands for industrial uses.
- Few or no policy or code changes are needed.
- Industrial, light industrial, and small retail uses continue to be the predominant use of land.

Only Small Commercial / Retail Sales



Light & Heavy Industry & Manufacturing

Freight & Trucks



Less compact use of land



Warehousing & Storage



Limit Residences & Offices



Auto Service & Repair



2013 Alternatives



Office & Research



Supporting
Commercial
/ Services

Local Production District

- Support niche and custom local production uses.
- Proximity of local production uses to more mixed uses and urban amenities is desirable, including retail and office uses.
- Potential for more compact and transit support industrial uses.
- Minor changes to increase flexibility, but retain industrial designation and character.



Niche / Speciality
Production



Compatible
Residential
Some Places



More Job Intensive Use of Sites



Industrial
Heritage & Character.
Adaptive Reuse.



Industrial
Compatible Uses

2013 Alternatives

Urban Village

- Intensify and diversify land uses.
- A mixed use urban village, live/work/play environment.
- Residential uses and retail uses serving adjacent communities expand.
- Major policy and land use code changes would be needed.
- Greatest potential for impacts (i.e.. transportation).



Improved Sidewalks
& Public Spaces

Large & Small Commercial
& Retail Services



Higher Density
Residential



Open
Space &
Recreation



Balanced,
Mixed
Transportation.



2013 Land Use Concepts

Industrial/
Commercial
Corridor

- There was room for some more flexibility

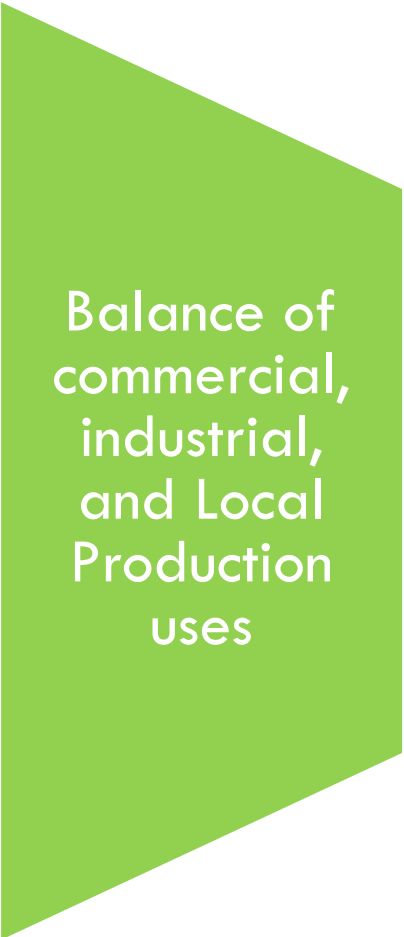
Local Production
District

- Good to aim for a balance

Urban Village

- Not a good fit for the area at this time.

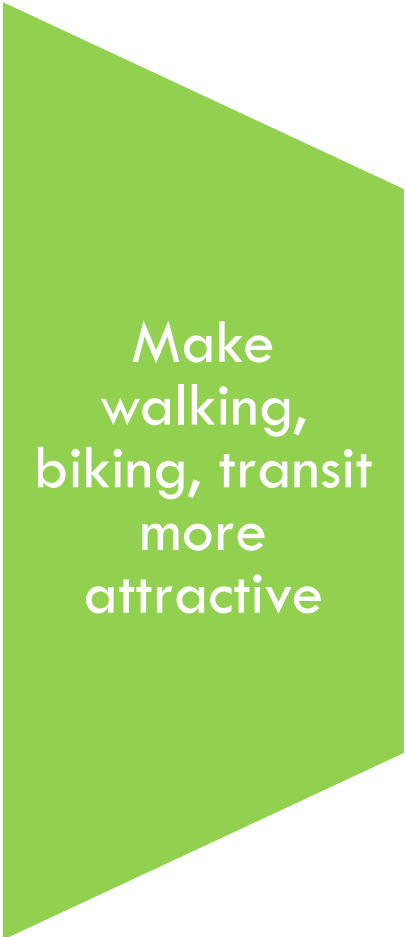
2013 Goals



Balance of
commercial,
industrial,
and Local
Production
uses



Support the
citywide
growth
strategy



Make
walking,
biking, transit
more
attractive



Mitigate
traffic
impacts of
new
development

Industrial Zones

General Industrial (IG-2)

Allows a broad range of manufacturing / commercial uses

Stricter maximum use limits

Office 25K
Retail 25K
Restaurant 5K

Industrial Commercial (IC)

Allows same uses as IG except heavy manufacturing

Fewer maximum use limits

Office No Max
Retail 75K
Restaurant No Max

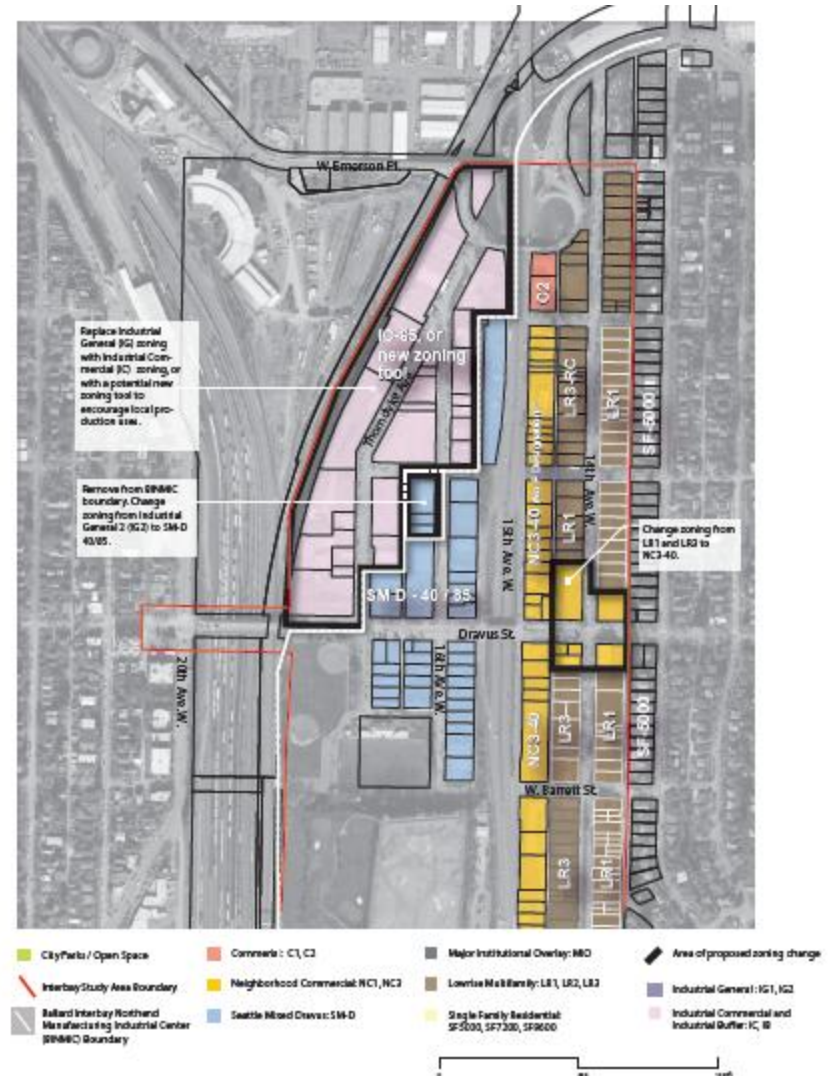
Or...

Other zoning options to support the desired land use concept?

2013 Draft Recommendations

Dravus Area

- Maintain the BINMIC boundary, but use more flexible zoning
 - IG2 to IC-65, IB or New Zone
 - 15.5 Acres, 25 Parcels
- Strengthen pedestrian character of 16th Avenue and Dravus Street
 - IG2 to SM-D 40/85
 - 0.7 Acres, 3 Parcels
 - LR1/LR3 to NC3-40
 - 1.6 Acres, 6 Parcels
 - Remove pedestrian designation from 15th Avenue W

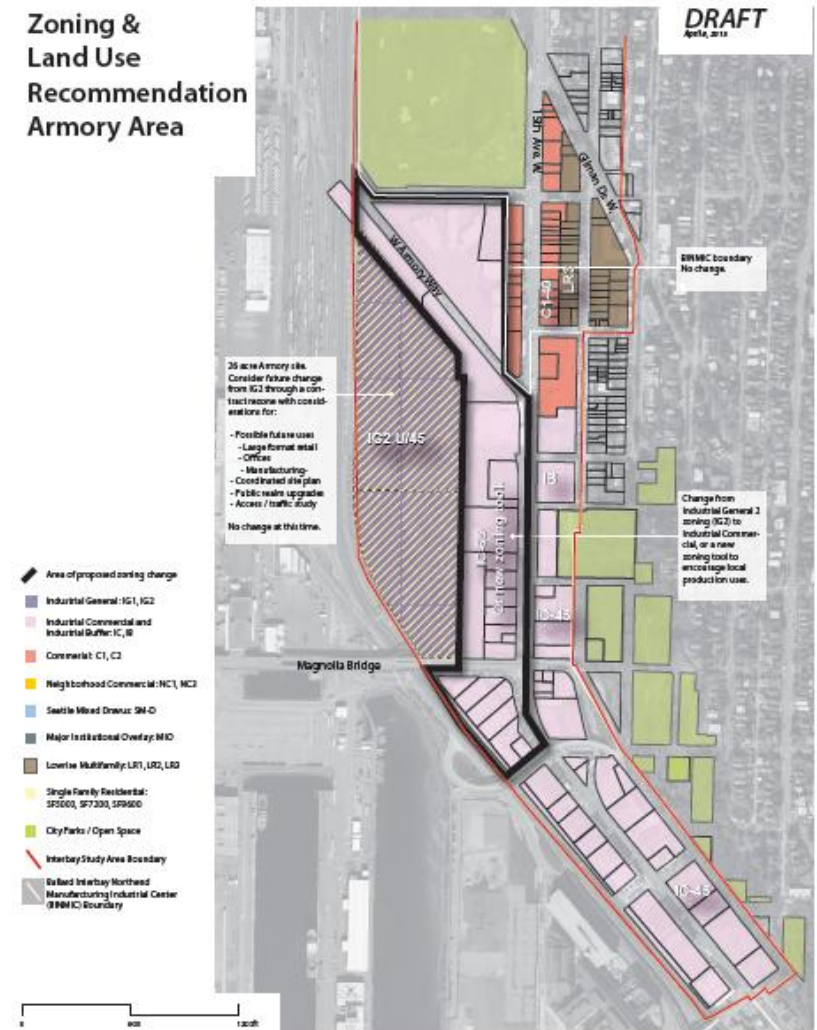


2013 Draft Recommendations

Armory Area

- Do not expand residential west of 15th Avenue W
- Maintain the BINMIC boundary, but use more flexible zoning
 - Change from IG2 to IC-65, IB or New Zoning Tool
 - 23.1 Acres, 19 Parcels
- Support the expansion of retail (or other non-residential uses) on Armory site through contract rezone
 - Defer any change to IG2 on Armory site
 - 26 Acres, 1 Parcel

Zoning & Land Use Recommendation Armory Area



Timeline



Now

Review
feedback,
draft
recommend
ations.
Summer
2013

Citywide
industrial
lands
policy
proposal.
Fall 2013

Additional
study of
Local
Production
concept.
2014

Community
outreach
industrial
lands
policies.

Comp. Plan
Policy
Adoption.
Spring
2016.



City of Seattle
Department of Planning and Development

Local Production Study



Local Production Study



Methods

1. Study Areas
2. Definition of Industrial Segments
3. Inventory & Data
4. Business case study interviews
5. Strategic Directions



Source: Hoover's 2014; Community Attributes

Local Production Study

Segment 1a: Local Production: Artisanal / Craft

Segment 1b: Local Production: Other



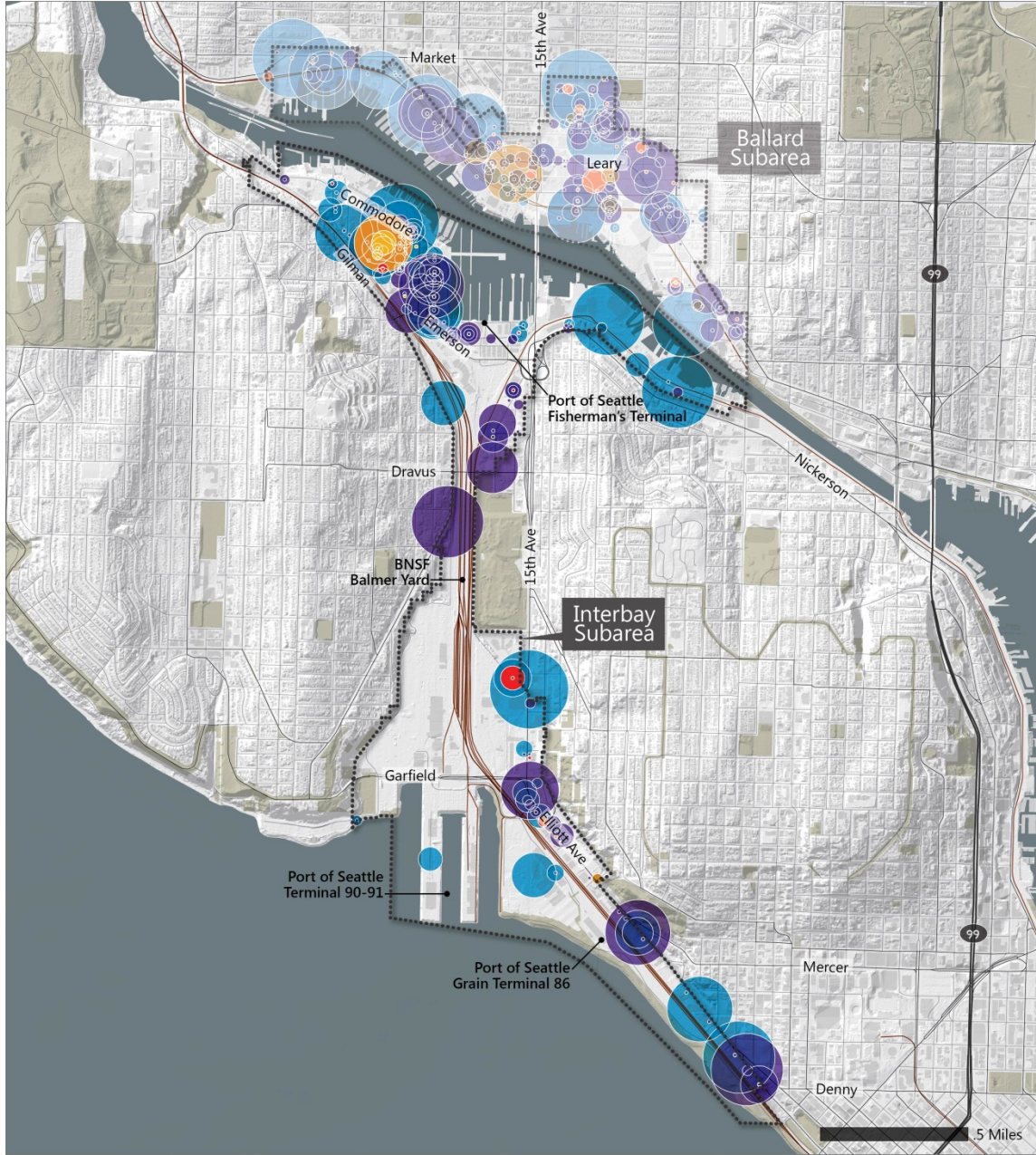
**Segment 2: Local Industrial Services,
Distribution and Repair**



**Segment 3: General / Export-Oriented
Industrial**



Industrial Establishment Locations by Segment



Local Production Inventory Ballard Subarea: Industrial Segments

1a. Local Production: Artisanal-Craft Establishments



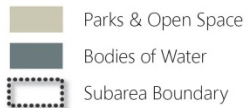
1b. Local Production: Other Establishments



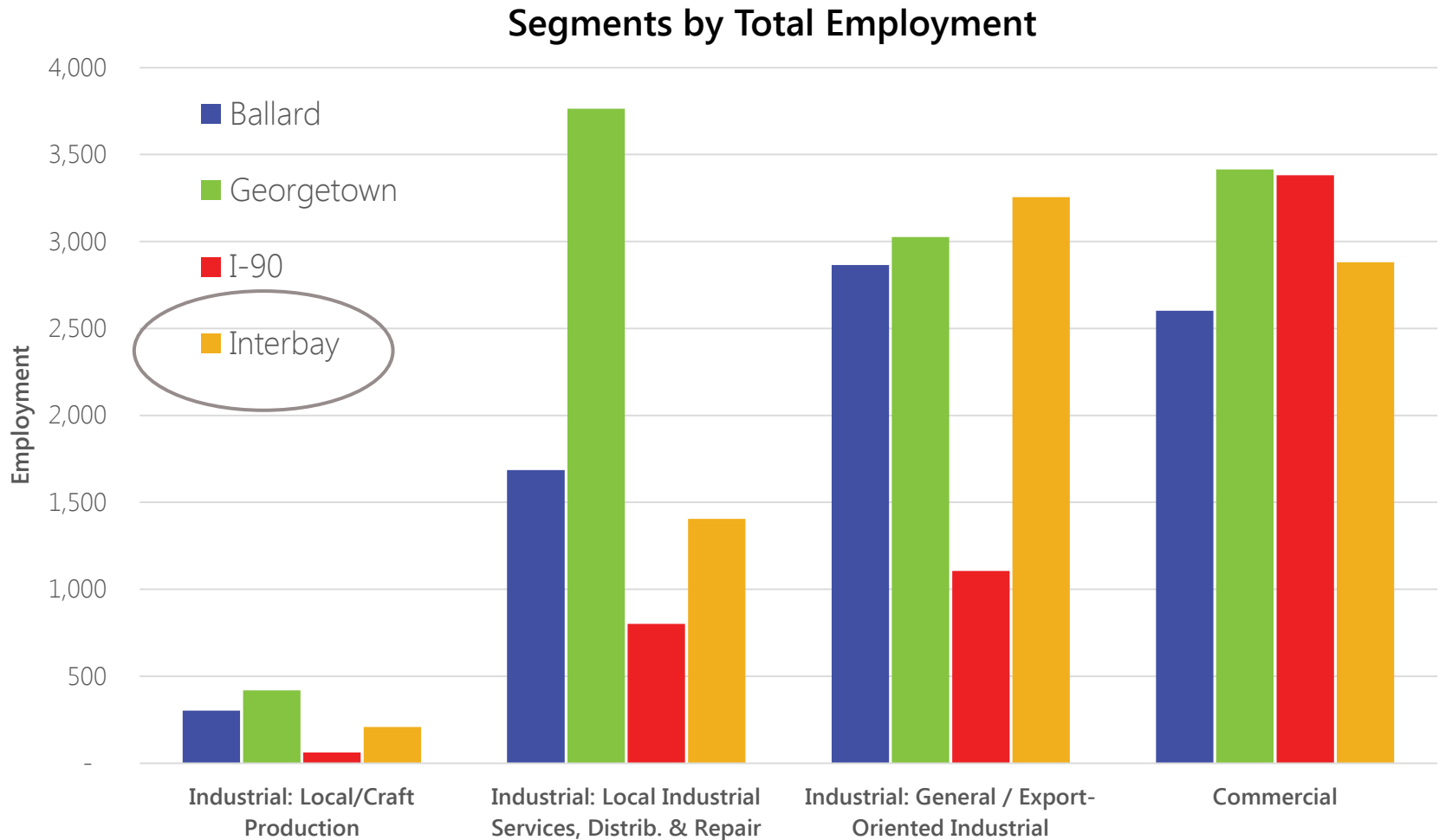
2. Local Industrial Services, Distribution & Repair Establishments



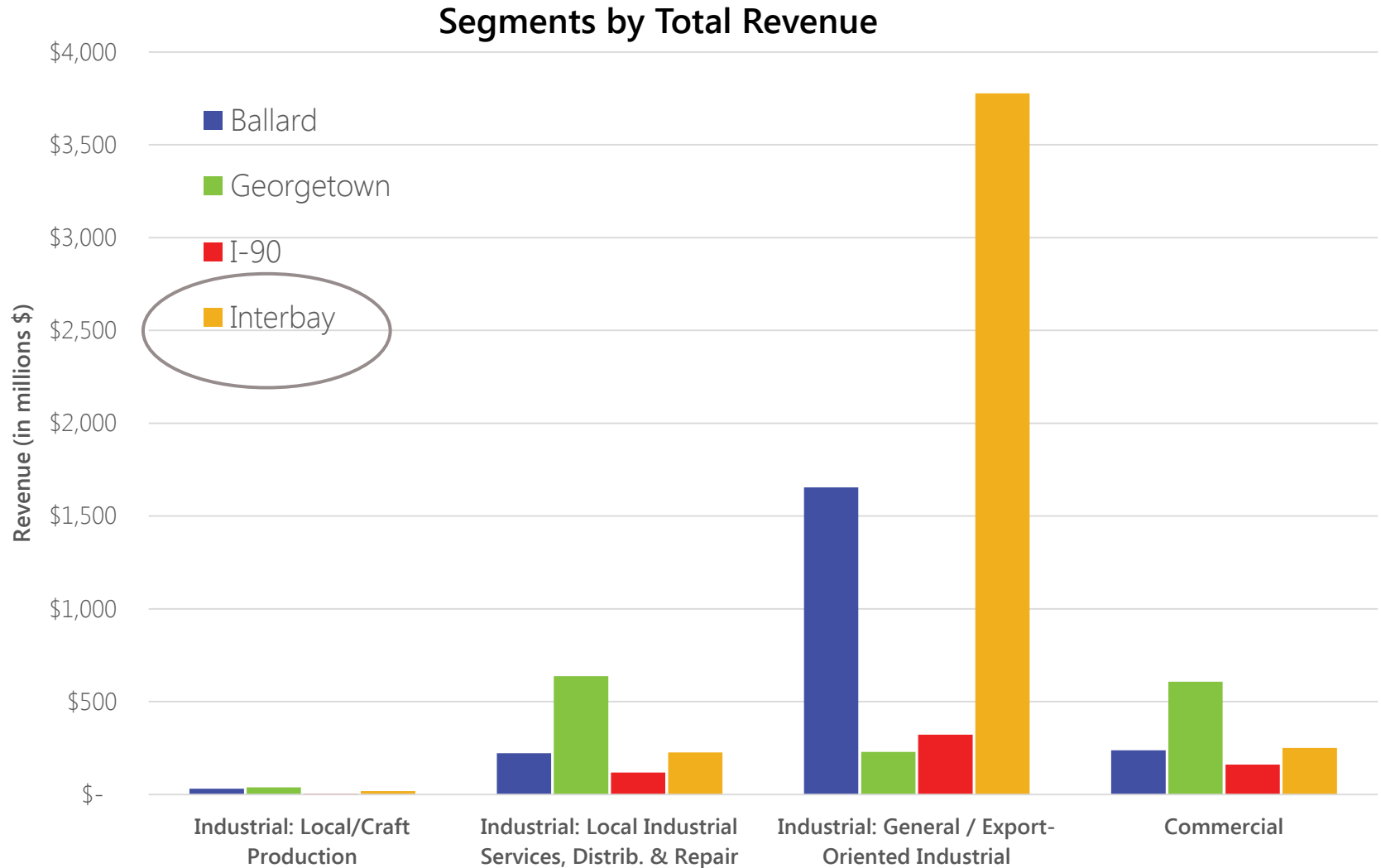
3. Export-Oriented Industrial Establishments



Segments by Subarea



Segments by Subarea



Select Findings / Directions

- In general, industrial uses in the study areas are strong and remain the predominant use of land and primary business activity.
- Local production is an important but relatively small segment of industrial activities.
- Local production businesses share similar concerns to other industrial businesses about their location. (i.e.. parking, access, affordability of space).
- There could be some policy reasons for targeted support of local production uses.
 - Preference for urban design and neighborhood character
 - Proximity to workforce in nearby urban communities
 - Incubator / graduation to export-oriented segment
- Many policies that protect all industrial uses would benefit local production uses.



Seattle

2035

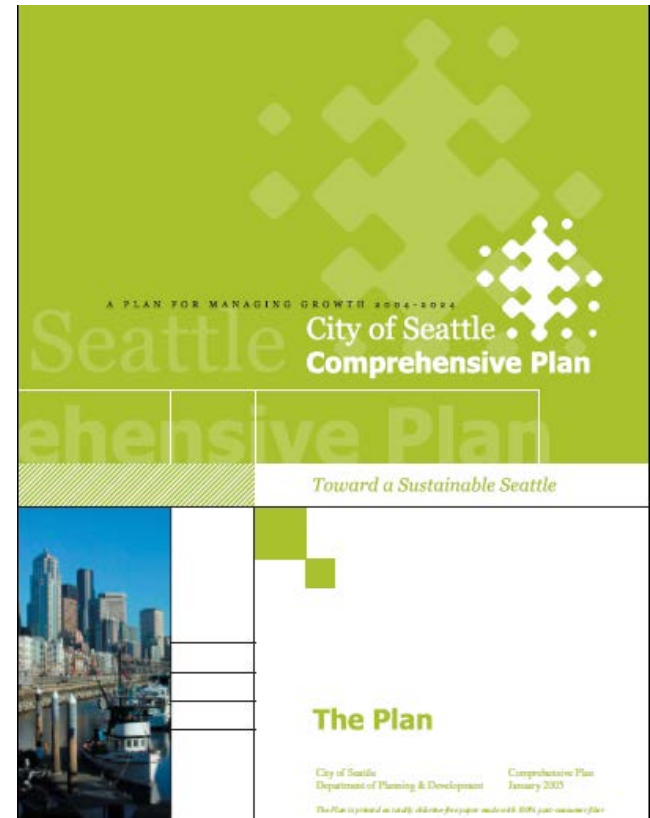
YOUR CITY, YOUR FUTURE

2035.Seattle.gov



Seattle's Comprehensive Plan

- City policies about where and how the city will grow
- 20 years of job and housing growth
- Urban Village Strategy



Current Industrial Policies

The City's Comprehensive Plan says:

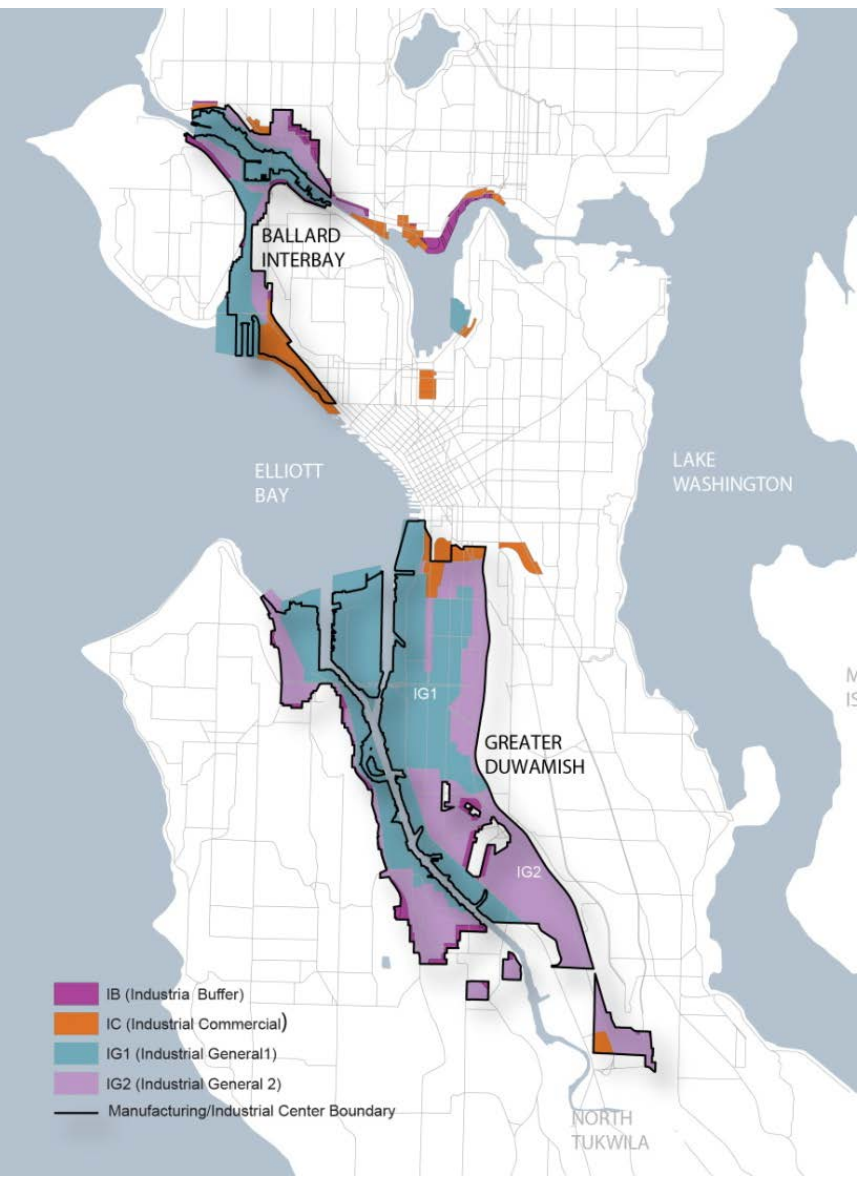
- Promote the use of industrial land for industrial purposes.
- Promote high value-added economic development by supporting growth in the industrial and manufacturing employment base.
- Restrict or prohibit uses that may negatively affect the availability of land for industrial activity, or that conflict with the character and function of industrial areas.

Why City Policies Protect Industrial Land

- Family wage jobs
- Economic resilience
- Support for international trade
- 1/3 of City's sales tax revenue
- 1/3 of City's B&O tax revenue

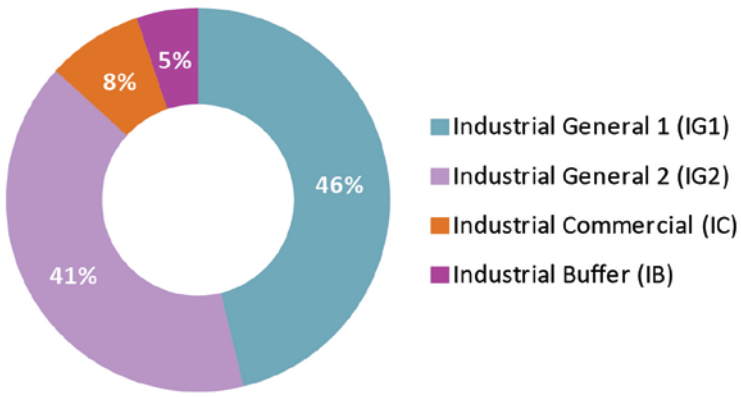


Seattle's Industrial Lands MICs and Zoning



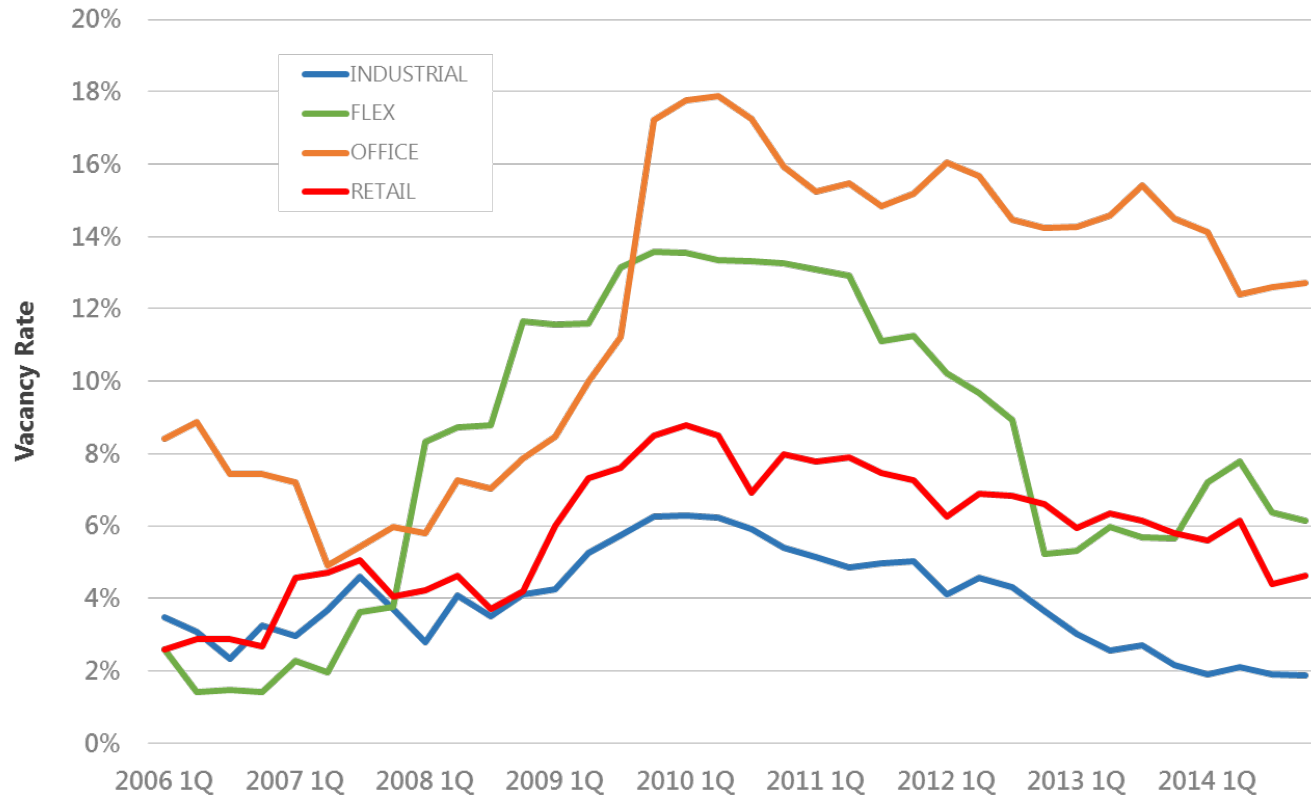
- Almost all of the city's 6,000 acres of industrially zoned land is in the Ballard/Interbay and Greater Duwamish M/ICs
- Duwamish is much larger (4,900 acres vs. 900) than Ballard/Interbay
- Land use code has 4 zoning designations – IG1, IG2, IC and IB

Gross Acres of Zoning



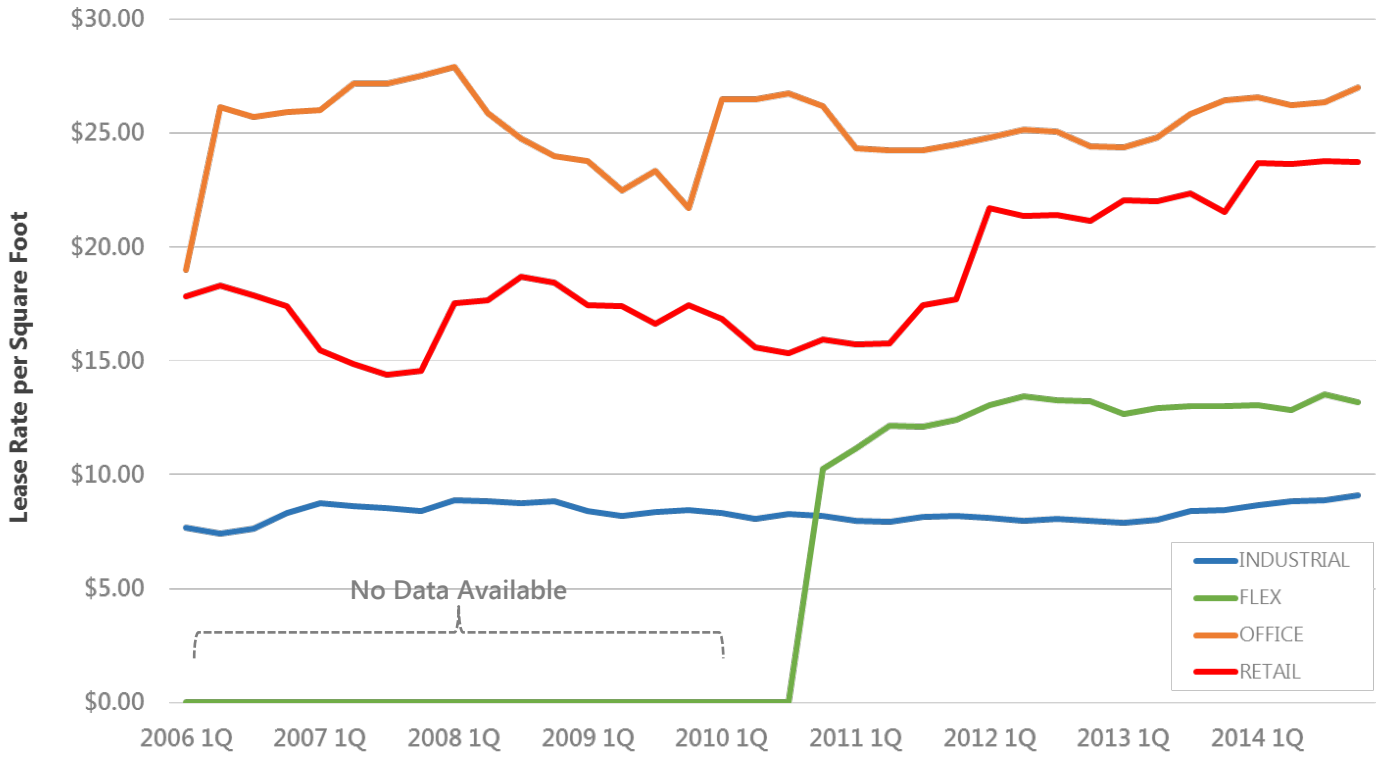
Vacancy Rates (All Subareas)

Vacancy Rates by Development Type

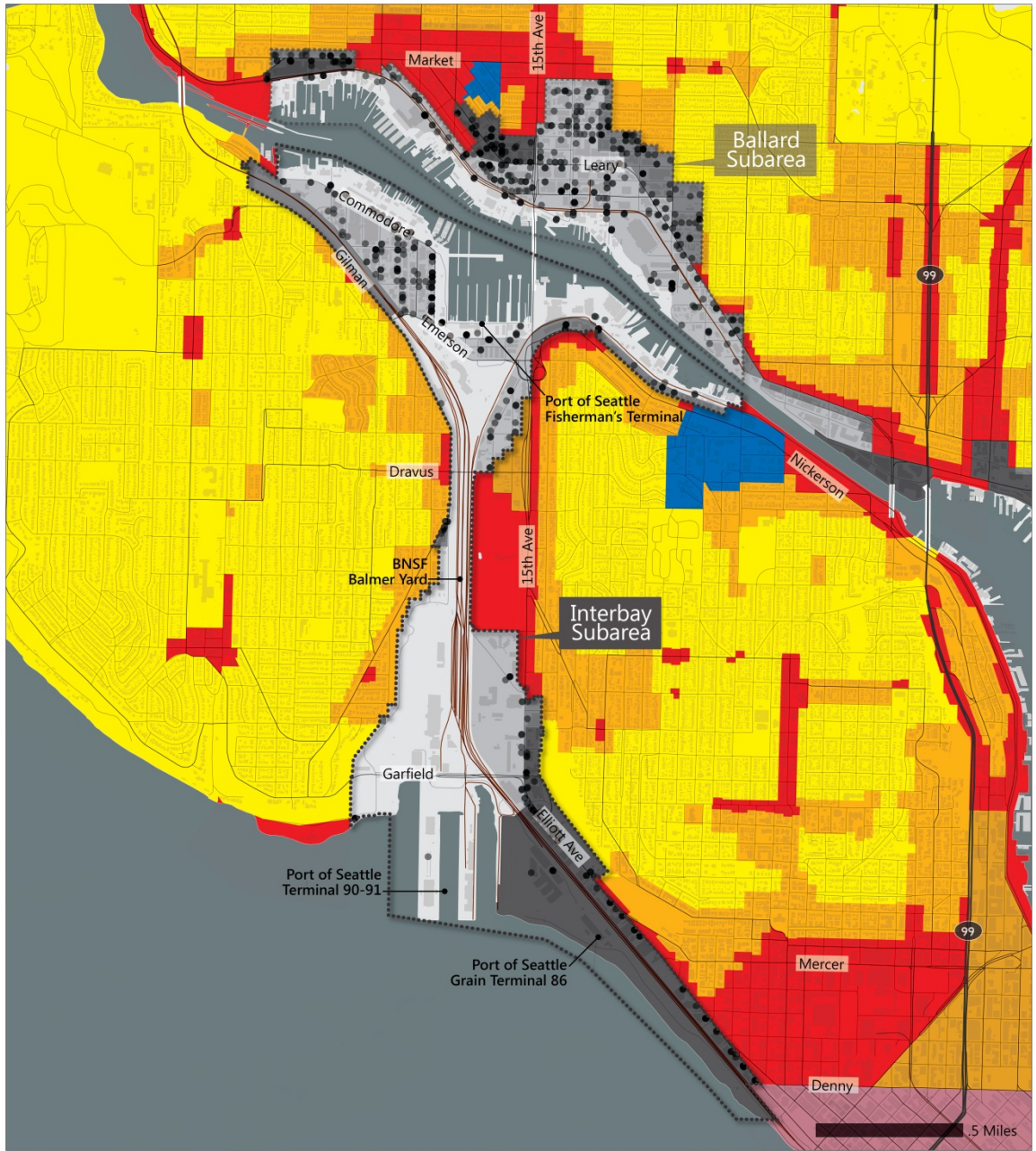


Lease Rates (All Subareas)

Lease Rates by Development Type



Inventory by Subarea: INTERBAY



Interbay Zoning

Local Production Inventory Interbay Zoning

- Specific Industrial Zoning**
- General Industrial 1
 - General Industrial 2
 - Industrial Buffer
 - Industrial Commercial
- Generalized Zoning**
- Downtown
 - Major Institutions
 - Master Planned Community
 - Multi-Family
 - Neighborhood/Commercial
 - Residential/Commercial
 - Single Family
- Inventoried Establishment*
 - Parks & Open Space
 - Bodies of Water
 - Subarea Boundary

*Note: Darker dots indicate multiple establishments
Source: City of Seattle; Community Attributes

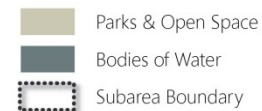
Inventory by Subarea: INTERBAY



Interbay Subarea

- 791 parcel acres
- 520 establishments
- 7,750 jobs in commercial and industrial activities.

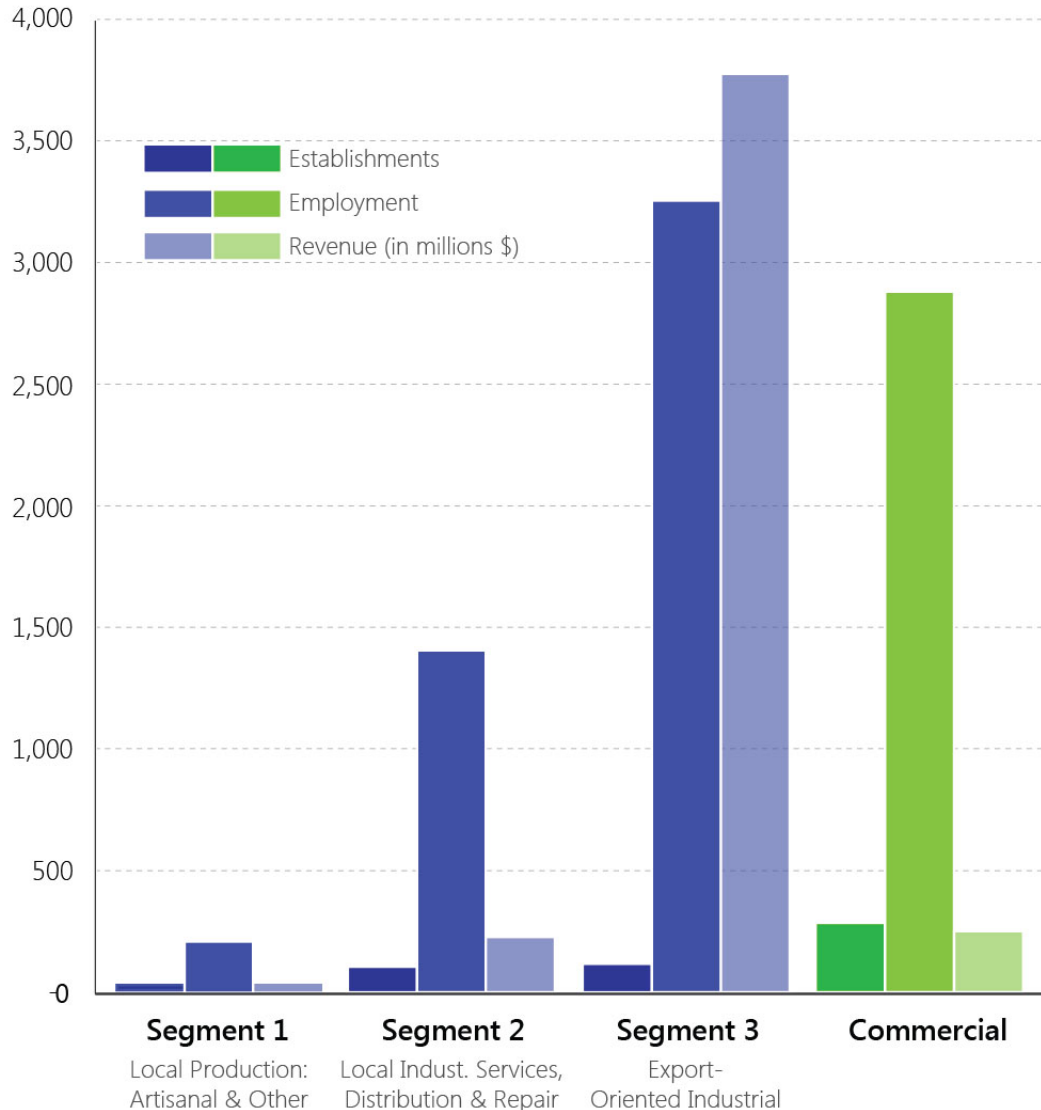
Local Production Inventory Interbay Subarea



Source: Hoover's 2014; Community Attributes

Inventory by Subarea: INTERBAY

Establishments, Employment & Revenue by Segment

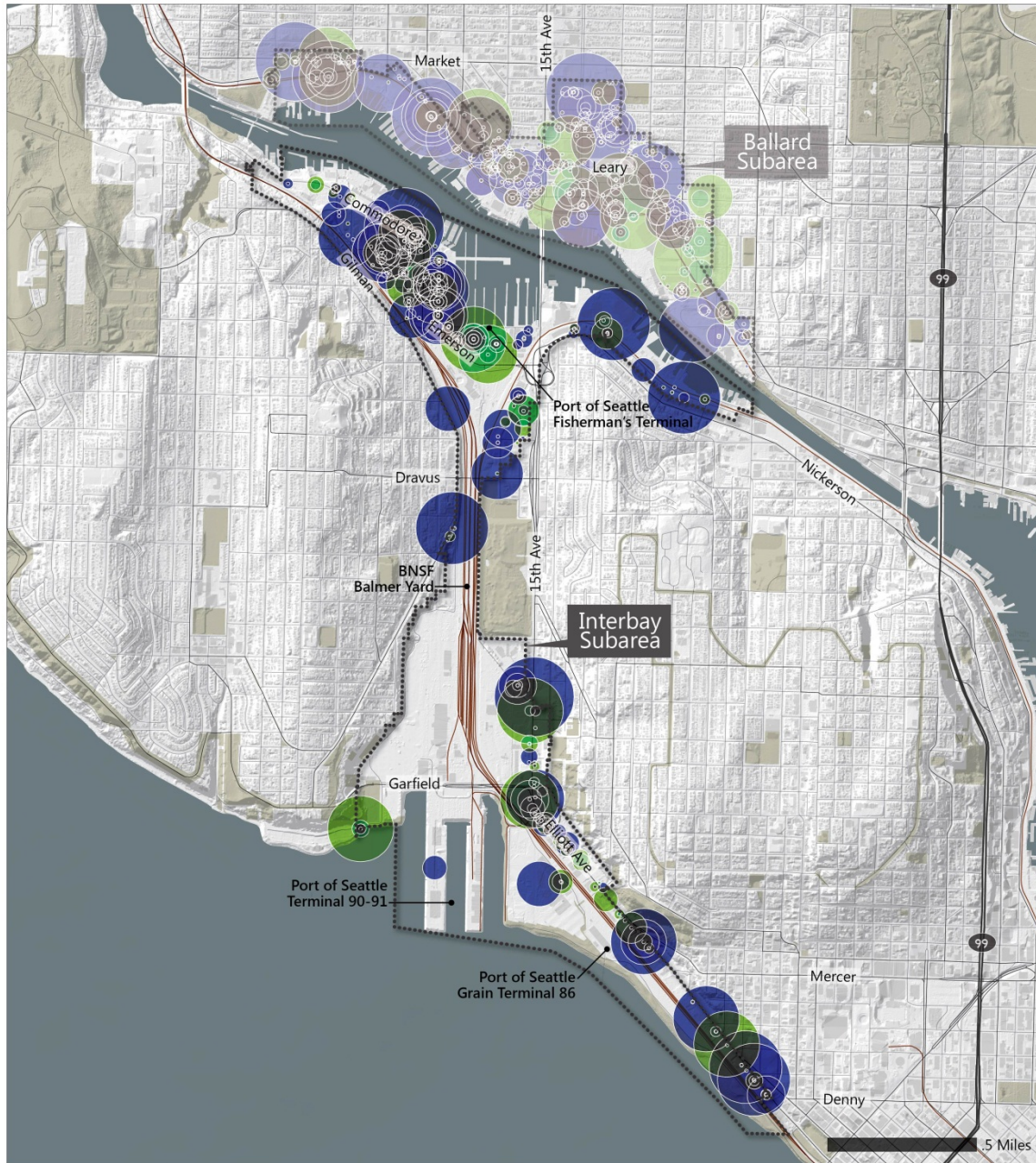


Export-Oriented industrial leads Interbay employment with 3,260 jobs.

Revenues generated are far higher for Segment 3 industrial than any other Segment.

Local Production businesses employ only 156 at 10 establishments.

Inventory by Subarea: INTERBAY



Commercial & Industrial Establishment Locations

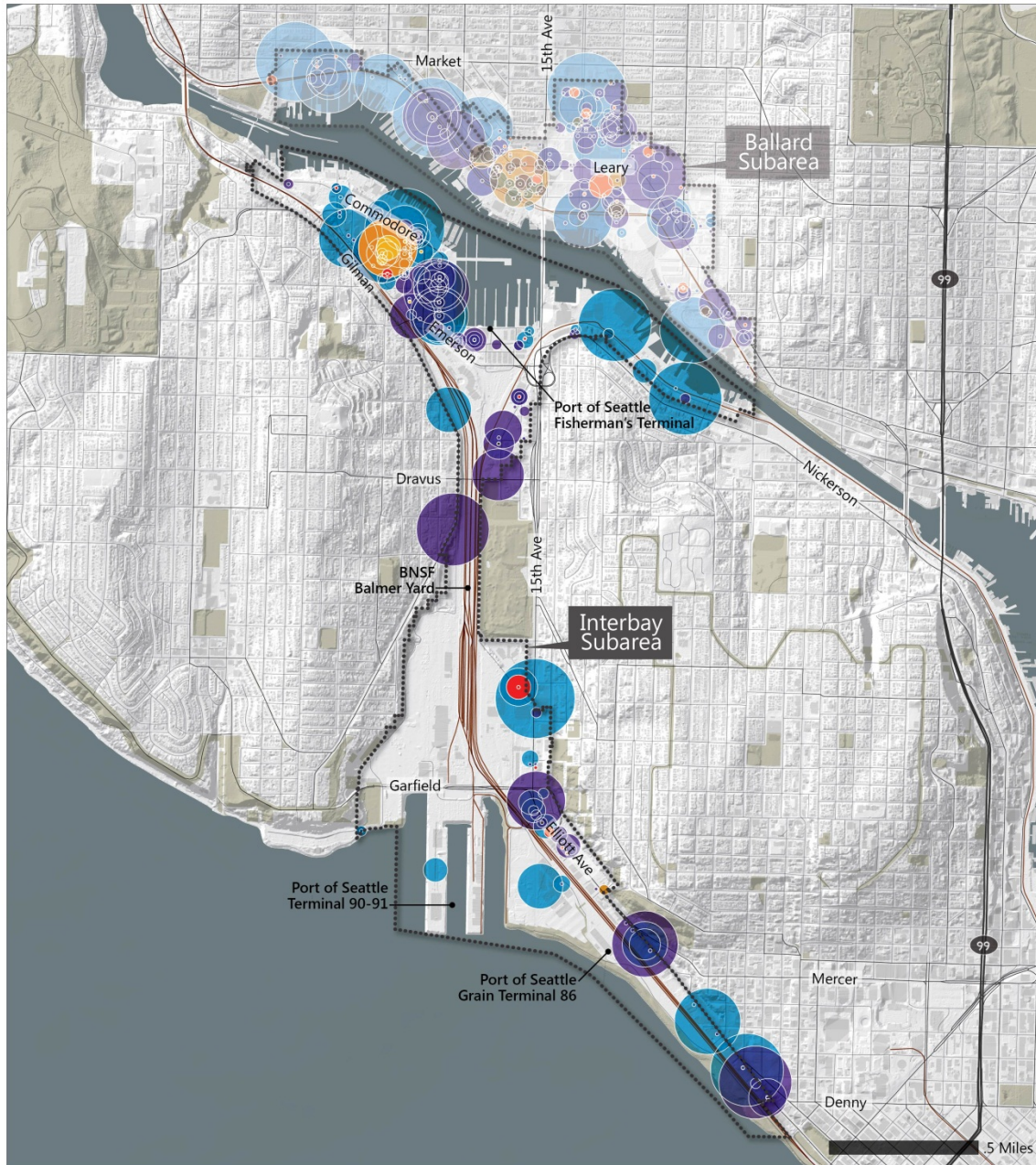
Local Production Inventory

Ballard Subarea: Commercial & Industrial



Source: Hoover's 2014; Community Attributes

Inventory by Subarea: INTERBAY

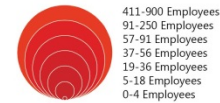


Industrial Establishment Locations by Segment

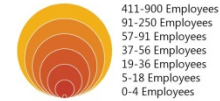
Local Production Inventory

Ballard Subarea: Industrial Segments

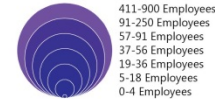
1a. Local Production: Artisanal-Craft Establishments



1b. Local Production: Other Establishments



2. Local Industrial Services, Distribution & Repair Establishments



3. Export-Oriented Industrial Establishments



Parks & Open Space

Bodies of Water

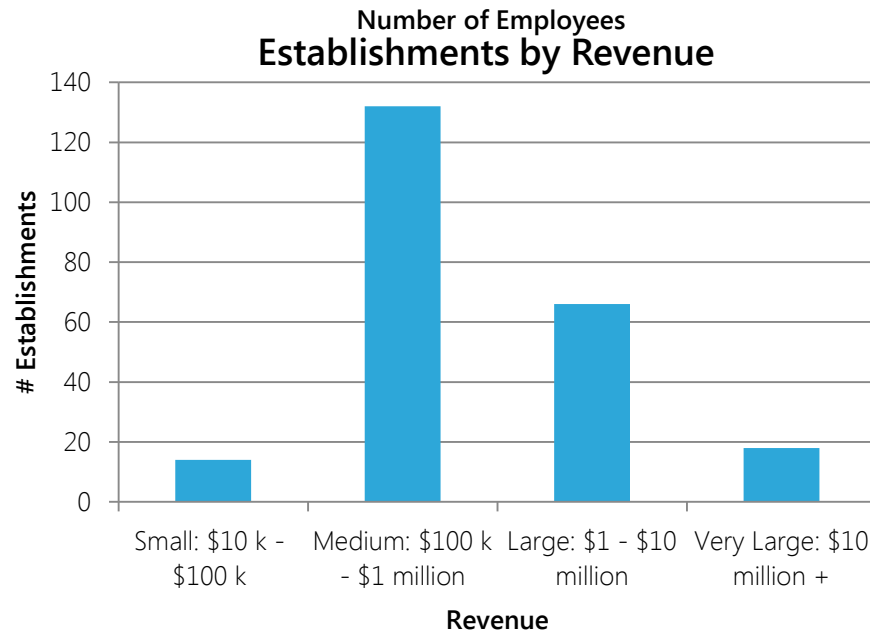
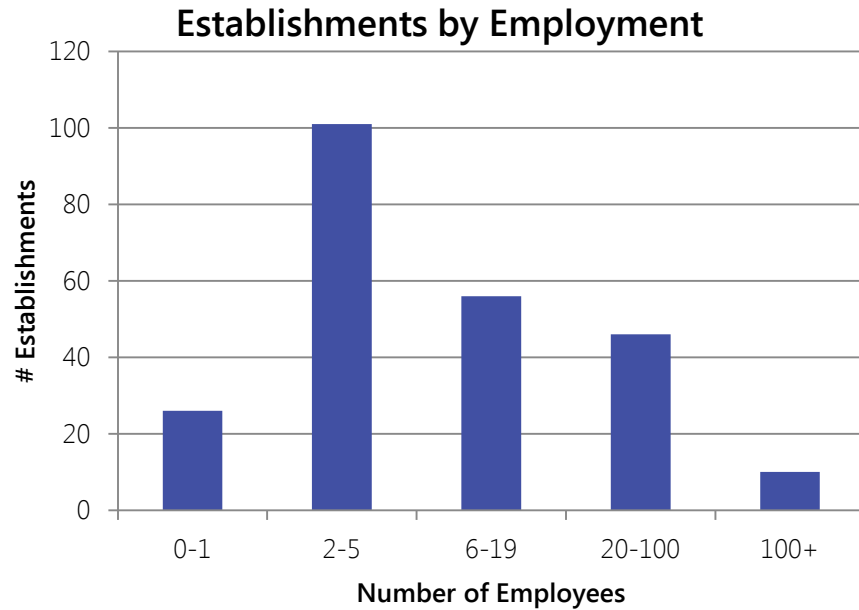
Subarea Boundary

Source: Hoover's 2014; Community Attributes

cai community attributes

Inventory by Subarea: INTERBAY

Establishment Size Profiles



- Most industrial establishments in Interbay have fewer than 20 people.
- There are only 10 large (100+ employee) establishments.
- Most industrial establishments in Interbay have revenues in the small to medium range (under \$1 million per year).

*Note: Industrial activities only; 2 establishment with 0 employment
Source: Hoover's 2014; Community Attributes*

Proposed New Policy

Criteria for reviewing requests to remove land from a M/IC:

- ▣ Specify the use for the land
- ▣ Demonstrate there is no other land in the city suitable for that use
- ▣ Proposed use would not replace an industrial use
- ▣ Proposed use would not interfere with nearby industrial operations

Proposed New Policy

Prohibit future rezones to Industrial/
Commercial (IC) zone inside M/ICs



Next Steps for these Policies

- Include policies in Seattle 2035
- Draft revised Comprehensive Plan **July 2015**
- Final EIS and Plan **December 2015**
- Council action on Plan **2016**

The logo for Seattle 2035 is displayed on a light yellow square background. The word "Seattle" is written in a red, cursive-style font. Below it, the year "2035" is written in a red, sans-serif font. Underneath the year, the tagline "YOUR CITY, YOUR FUTURE" is written in a smaller, red, sans-serif font.

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2035
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Questions ?

