1 Scope & Timeline

2 Methodology

3 Inventory Overview

4 Inventory by Subarea
   a. Ballard
   b. Interbay
   c. I-90 / Mt. Baker
   d. Georgetown

5 Market Analysis

6 Case Studies

7 Strategic Themes
Local Production Study: Summary of Findings

> Local production uses, while a relatively small slice of the overall mix of industrial an commercial activities in the areas studies in terms of employment, revenue, and number of establishments appear to “graduate” to export-oriented producers over time – a segment with a greater impact on the regional economy.

> While adjacency of commercial, residential or mixed-used development to local production uses *per se* has not been particularly problematic (with the opposite true in some cases), secondary impacts of such development have – including lack of or expensive parking, increased traffic, and rising rents.

> Local production uses, as users of B2B services, distributors and suppliers, have a higher multiplier effect than other industrial activities – resulting in a disproportionately larger impact on the local economy.

> Local industrial services, distribution & repair are a significant and important segment of the local and regional economy.

> Local production uses are most primarily concerned with challenges associated with parking, traffic, rents, infrastructure and environmental regulation.

> Flexibility of buildings and mixing of uses under one roof was cited repeatedly as an advantage to local production uses; however, older and obsolete facilities were also mentioned as challenges.

> Artisanal businesses seem to appreciate building and neighborhood character, intensity, and heterogeneity / mix of uses more than traditional industrial users.
1 Scope & Timeline
1 Scope & Timeline

Task 1 – Existing Conditions Inventory

1.1 Inventory of Local Production Activities by Subarea
1.2 Segmentation of Inventoried Local Production Activities
1.3 Market and Demand Analysis of Local Production Concentrations by Subarea

Task 2 – Potential Incentives Review

2.1 Proforma Feasibility Analysis Case Studies
2.2 Development and Exposition of Local Production Strategies
1 Scope & Timeline

Task 1
- September: firm / site inventory
- October: segmentation, market analysis

Task 2
- November: case studies
- December: strategies

Check-in 1: Call
Check-in 2: Call
Check-in 3: Call Report
2 Methodology
Firm-Site Inventory Methodology

1. Definition of Industrial Activities
2. Areas of Study
3. Inventory & Data
4. Segmentation
## Methodology

### Definition of Industrial Activities

<table>
<thead>
<tr>
<th>NAICS Code</th>
<th>Industry Code Description</th>
<th>NAICS Code</th>
<th>Industry Code Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agriculture, Forestry, Fishing &amp; Hunting</td>
<td></td>
<td>Wholesale Trade</td>
<td></td>
</tr>
<tr>
<td>114</td>
<td>Fishing, Hunting &amp; Trapping</td>
<td>423</td>
<td>Merchant Wholesalers (Durable)</td>
</tr>
<tr>
<td>115</td>
<td>Support Services for Agriculture / Forestry</td>
<td>424</td>
<td>Merchant Wholesalers (Non-durable)</td>
</tr>
<tr>
<td>Mining, Quarrying, Oil &amp; Gas</td>
<td></td>
<td>425</td>
<td>Electronic Markets, Agents and Brokers</td>
</tr>
<tr>
<td>212</td>
<td>Mining</td>
<td>44410</td>
<td>Building Materials Dealers</td>
</tr>
<tr>
<td>213</td>
<td>Support Activities for Mining</td>
<td>4542</td>
<td>Vending Machine Operators</td>
</tr>
<tr>
<td></td>
<td>45431</td>
<td>Heating Oil Dealers</td>
<td></td>
</tr>
<tr>
<td>Utilities</td>
<td>221</td>
<td>Utilities</td>
<td></td>
</tr>
<tr>
<td>Construction</td>
<td>236</td>
<td>Construction of Buildings</td>
<td></td>
</tr>
<tr>
<td>237</td>
<td>Heavy and Civil Engineering Construction</td>
<td></td>
<td></td>
</tr>
<tr>
<td>238</td>
<td>Specialty Trade Contractors</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manufacturing</td>
<td>311</td>
<td>Food</td>
<td></td>
</tr>
<tr>
<td>312</td>
<td>Beverage and Tobacco Product</td>
<td></td>
<td></td>
</tr>
<tr>
<td>313</td>
<td>Textile Mills</td>
<td></td>
<td></td>
</tr>
<tr>
<td>314</td>
<td>Textile Product Mills</td>
<td></td>
<td></td>
</tr>
<tr>
<td>315</td>
<td>Apparel</td>
<td></td>
<td></td>
</tr>
<tr>
<td>316</td>
<td>Leather and Allied Product</td>
<td></td>
<td></td>
</tr>
<tr>
<td>321</td>
<td>Wood Product</td>
<td></td>
<td></td>
</tr>
<tr>
<td>322</td>
<td>Paper</td>
<td></td>
<td></td>
</tr>
<tr>
<td>323</td>
<td>Printing and Related Support</td>
<td></td>
<td></td>
</tr>
<tr>
<td>324</td>
<td>Petroleum and Coal Products</td>
<td></td>
<td></td>
</tr>
<tr>
<td>325</td>
<td>Chemical</td>
<td></td>
<td></td>
</tr>
<tr>
<td>326</td>
<td>Plastics and Rubber Products</td>
<td></td>
<td></td>
</tr>
<tr>
<td>327</td>
<td>Nonmetallic Mineral Product</td>
<td></td>
<td></td>
</tr>
<tr>
<td>331</td>
<td>Primary Metal</td>
<td></td>
<td></td>
</tr>
<tr>
<td>332</td>
<td>Fabricated Metal Product</td>
<td></td>
<td></td>
</tr>
<tr>
<td>333</td>
<td>Machinery</td>
<td></td>
<td></td>
</tr>
<tr>
<td>334</td>
<td>Computer and Electronics</td>
<td></td>
<td></td>
</tr>
<tr>
<td>335</td>
<td>Electrical Equipment, Appliance, and Component</td>
<td></td>
<td></td>
</tr>
<tr>
<td>336</td>
<td>Transportation Equipment</td>
<td></td>
<td></td>
</tr>
<tr>
<td>337</td>
<td>Furniture and Related Product</td>
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<td></td>
</tr>
<tr>
<td>339</td>
<td>Miscellaneous</td>
<td></td>
<td></td>
</tr>
<tr>
<td>339</td>
<td>Miscellaneous</td>
<td></td>
<td></td>
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<tr>
<td>Retail Trade</td>
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<td>444190</td>
<td>Building Materials Dealers</td>
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<tr>
<td></td>
<td>4542</td>
<td>Vending Machine Operators</td>
<td></td>
</tr>
<tr>
<td></td>
<td>45431</td>
<td>Heating Oil Dealers</td>
<td></td>
</tr>
<tr>
<td>Transportation and Warehousing</td>
<td>481</td>
<td>Air Transportation</td>
<td></td>
</tr>
<tr>
<td>482</td>
<td>Rail Transportation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>483</td>
<td>Water Transportation</td>
<td></td>
<td></td>
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<tr>
<td>484</td>
<td>Truck Transportation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>485</td>
<td>Transit and Ground Passenger Transportation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>486</td>
<td>Pipeline Transportation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>487</td>
<td>Scenic and Sightseeing Transportation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>488</td>
<td>Support Activities for Transportation</td>
<td></td>
<td></td>
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<tr>
<td>491</td>
<td>Postal Service</td>
<td></td>
<td></td>
</tr>
<tr>
<td>492</td>
<td>Couriers and Messengers</td>
<td></td>
<td></td>
</tr>
<tr>
<td>493</td>
<td>Warehousing and Storage</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Information</td>
<td>511</td>
<td>Publishing Industries (Except Digital Publishing</td>
<td></td>
</tr>
<tr>
<td>512</td>
<td>Motion Picture and Video Production</td>
<td></td>
<td></td>
</tr>
<tr>
<td>515</td>
<td>Broadcasting</td>
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<td>517</td>
<td>Telecommunications</td>
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<td></td>
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<tr>
<td>Real Estate and Rental and Leasing</td>
<td>53113</td>
<td>Mini Warehouse and Self-Storage</td>
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<tr>
<td>53212</td>
<td>Truck Rental and Leasing</td>
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<td>5324</td>
<td>Machinery/Equipment Rental and Leasing</td>
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<td>Administrative &amp; support &amp; waste management &amp; remediation services</td>
<td>54130</td>
<td>Engineering Services</td>
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<td>54138</td>
<td>Testing Laboratories</td>
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<td>5417</td>
<td>Research &amp; Development Services</td>
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<td>54185</td>
<td>Display Advertising</td>
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<td></td>
</tr>
<tr>
<td>54199</td>
<td>Other Professional Services (Select)</td>
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<tr>
<td>Health Care and Social Assistance</td>
<td>561612</td>
<td>Security Guards and Patrol</td>
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<tr>
<td>56162</td>
<td>Security Systems</td>
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<tr>
<td>56171</td>
<td>Extermination and Pest Control</td>
<td></td>
<td></td>
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<tr>
<td>56172</td>
<td>Janitorial</td>
<td></td>
<td></td>
</tr>
<tr>
<td>56173</td>
<td>Landscaping</td>
<td></td>
<td></td>
</tr>
<tr>
<td>56174</td>
<td>Carpet and Upholstery Cleaning</td>
<td></td>
<td></td>
</tr>
<tr>
<td>56179</td>
<td>Other Services to Buildings and Dwellings</td>
<td></td>
<td></td>
</tr>
<tr>
<td>56191</td>
<td>Packaging and Labeling</td>
<td></td>
<td></td>
</tr>
<tr>
<td>562</td>
<td>Waste Management and Remediation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accommodation and Food Services</td>
<td>62191</td>
<td>Ambulance Services</td>
<td></td>
</tr>
<tr>
<td>621991</td>
<td>Blood and Organ Banks</td>
<td></td>
<td></td>
</tr>
<tr>
<td>62421</td>
<td>Community Food Services</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other Services</td>
<td>72232</td>
<td>Caterers</td>
<td></td>
</tr>
<tr>
<td>72233</td>
<td>Mobile Food Services</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Automotive Repair &amp; Maintenance (except 811191 &amp; 811192)</td>
<td>811</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Methodology

Areas of Study:
Local Production Subareas

[Map showing Ballard Subarea, Interbay Subarea, I-90/Mt. Baker Subarea, Georgetown Subarea]
Inventory & Data

1. Hoover’s Selection
2. Screening for Duplicates
3. Parcel Matching
4. Quality Control
5. Subarea Assignment
6. Segmentation
Segment 1a: Local Production: Artisanal / Craft Establishments

This study defines Local Production businesses as those engaged in the production or manufacture of products or goods, with a significant portion of sales or distribution to the local or regional market. Within this category are two subtypes - Artisanal / Craft (1a), and Other (1b). Artisanal / Craft businesses are a subset of Local Production distinguished by high-quality, small-scale, and individually- or hand-made goods. These products often substitute for those commonly imported or mass-produced. Businesses in this segment may also market or distribute goods to national or international markets through the internet, ultimately transitioning to export-oriented (Segment 3) businesses.

> Craft food, beer, spirits (including Hilliards Brewery, Theo Chocolate, Distillery 206)
> Furniture & interior fixtures (including Ballard Ornamental Ironworks, Meyer-Wells Furniture)
> Boutique apparel & jewelry
> Outdoor recreation equipment
> Other (including sign manufacturing; specialty manufacturing)
Segment 1b: Local Production: Other Establishments

Other Local Production businesses encompass non-artisanal production, manufacturing, processing, and fabrication serving the local or regional economy. These Local Production activities are often business-to-business (B2B) in nature, serving other up-stream or down-stream producers and distributors (eg, metal coating and embroidery).

- Metal Coaters (including the former Scott Galvanizing)
- Embroidery (including 1st Impressions Embroidery)
- Machine Shops
- Generic Food Processing (including Kof Enterprises)
- Engraving & Heat Treating
Segment 2: Local Industrial Services, Distribution and Repair

Businesses that provide distribution, storage, industrial service or repair, and wholesaling functions generally in support of the local or regional economy. Businesses are generally not engaged in exporting outside of the region, but may provide support services to businesses that do.

> Construction & Building Materials
  (including cement plants, eg Lakeside Industries, Fremont) / Specialty Contractors (Electricians, Plumbers, etc.)
> Trucking
> Wholesaling
> Local Publishing & Printing
> Industrial Services (including Commercial Printing; Industrial Laundering; Equipment Rental, Repair, Maintenance; Catering)
> Self Storage
> Automotive Repair
Segment 3: General / Export-Oriented Industrial

Businesses primarily engaged in production or manufacturing of products, or providing industrial services, to national or international markets and outside of the region. Businesses may also distribute goods or provide services locally, but this is not a primary focus or significant portion of their overall activity.

- Pharmaceutical Manufacturing
- Plastic, Rubber, Glass Manufacturing (including Vaupell Industrial Plastics)
- Pulp & Paper Products
- Packaging Manufacturing
- Chemical Manufacturing
- Other Manufacturing (including GM Nameplate)
- National Distribution
- Maritime Cluster (including Trident, Ocean Beauty, Foss Maritime, Kvichak Marine; Sagstad Marina)
- Aerospace Cluster (including Boeing)
3 Inventory Overview
### Subarea Vital Statistics

<table>
<thead>
<tr>
<th>Subarea</th>
<th>Total Establishments</th>
<th>Total Employment</th>
<th>Area (Acres)</th>
<th>Number of Parcels</th>
<th>Parcel Area (Acres)</th>
<th>Employment Density (Empl/Acre)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ballard</td>
<td>594</td>
<td>7,454</td>
<td>351</td>
<td>533</td>
<td>252*</td>
<td>30*</td>
</tr>
<tr>
<td>Georgetown</td>
<td>810</td>
<td>10,622</td>
<td>784</td>
<td>932</td>
<td>513</td>
<td>21</td>
</tr>
<tr>
<td>I-90 / Mt. Baker</td>
<td>330</td>
<td>5,350</td>
<td>258</td>
<td>431</td>
<td>149</td>
<td>36</td>
</tr>
<tr>
<td>Interbay</td>
<td>523</td>
<td>7,750</td>
<td>902</td>
<td>362</td>
<td>791</td>
<td>10</td>
</tr>
<tr>
<td><strong>Totals</strong></td>
<td>2,257</td>
<td>31,176</td>
<td>2,295</td>
<td>2,258</td>
<td>1,705</td>
<td>18</td>
</tr>
</tbody>
</table>

*Excludes Boeing Field parcel

Of the four industrial “neighborhoods” of Seattle that are the focus of this study, Georgetown is the most prominent in terms of employment and number of establishments, followed Ballard and Interbay with similar employment and establishments, and by I-90/Mt. Baker – the smallest of the four. Interbay is the largest in terms of land and parcel area.

While I-90/Mt. Baker is smallest in terms of employment and establishments, it has the greatest overall employment density of the four study areas – or “Subareas” – at 36 employees per acre, followed by Ballard with 30 employees per acre.
### Commercial versus Industrial Activity by Subarea

<table>
<thead>
<tr>
<th>Subarea</th>
<th>Industrial</th>
<th>% Total Estabs.</th>
<th>Industrial Employment</th>
<th>% Total Employment</th>
<th>Commercial</th>
<th>% Total Estabs.</th>
<th>Commercial</th>
<th>% Total Employment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ballard</td>
<td>329</td>
<td>55%</td>
<td>4,852</td>
<td>65%</td>
<td>265</td>
<td>45%</td>
<td>2,602</td>
<td>35%</td>
</tr>
<tr>
<td>Georgetown</td>
<td>444</td>
<td>55%</td>
<td>7,208</td>
<td>68%</td>
<td>366</td>
<td>45%</td>
<td>3,414</td>
<td>32%</td>
</tr>
<tr>
<td>I-90 / Mt. Baker</td>
<td>96</td>
<td>29%</td>
<td>1,969</td>
<td>37%</td>
<td>234</td>
<td>71%</td>
<td>3,381</td>
<td>63%</td>
</tr>
<tr>
<td>Interbay</td>
<td>239</td>
<td>46%</td>
<td>4,869</td>
<td>63%</td>
<td>284</td>
<td>54%</td>
<td>2,881</td>
<td>37%</td>
</tr>
<tr>
<td>Totals</td>
<td>1,108</td>
<td>49%</td>
<td>18,898</td>
<td>61%</td>
<td>1,149</td>
<td>51%</td>
<td>12,278</td>
<td>39%</td>
</tr>
</tbody>
</table>

In terms of the mix between commercial and industrial employment, I-90/Mt. Baker is the outlier with a minority of industrial employment (37%); this is due, however, to the inclusion of commercially-zoned areas south of I-90 in the Subarea boundaries.

Georgetown has the highest percentage of industrial employment at 68%, and the greatest number of industrial firms (444) of the areas studied, followed by Ballard and Interbay.

Commercial establishments and employment in absolute terms are roughly similar across all four Subareas.
The graphs at left indicate the relative proportions of commercial to industrial employment – by both number of establishments and employment – across all four Subareas.

I-90/Mt. Baker is the outlier in terms of industrial employment and establishments, while Interbay and Ballard are similar in terms of both proportion and absolute numbers. Georgetown has the largest industrial and commercial employment of the areas studied, and like I-90/Mt. Baker, also includes non-industrially zoned lands within its study area boundary.

Source: Hoover’s 2014; Community Attributes
In the four local production centers studied, Seattle’s General Industrial 2 (IG2) zone encompassed the greatest number of establishments inventoried by a large margin. Total revenues, too, for establishments located in this zone were significantly higher than all other zones with the notable exception of the Industrial Commercial (IC) zone, where a number of large office uses are located.
## Top Employers (all Subareas)

<table>
<thead>
<tr>
<th>Employer</th>
<th>Employees at Location</th>
<th>Subarea</th>
<th>Industrial?</th>
<th>Primary Industry</th>
</tr>
</thead>
<tbody>
<tr>
<td>King County</td>
<td>900</td>
<td>I-90 / Mt. Baker</td>
<td>No</td>
<td>US Municipal Governments</td>
</tr>
<tr>
<td>The Boeing Company</td>
<td>831</td>
<td>Georgetown</td>
<td>Yes</td>
<td>Aerospace Products &amp; Parts Manufacturing</td>
</tr>
<tr>
<td>Ardagh Glass Inc.</td>
<td>600</td>
<td>Georgetown</td>
<td>Yes</td>
<td>Converted Paper Products Manufacturing</td>
</tr>
<tr>
<td>Alpac Corporation</td>
<td>600</td>
<td>I-90 / Mt. Baker</td>
<td>Yes</td>
<td>Soft Drink Manufacturing</td>
</tr>
<tr>
<td>Vaupell Industrial Plastics, Inc.</td>
<td>410</td>
<td>Ballard</td>
<td>Yes</td>
<td>Plastic &amp; Rubber Product Manufacturing</td>
</tr>
<tr>
<td>GM Nameplate Inc.</td>
<td>373</td>
<td>Interbay</td>
<td>Yes</td>
<td>Fabricated Metal Product Manufacturing</td>
</tr>
<tr>
<td>The Lighthouse for the Blind, Inc.</td>
<td>350</td>
<td>I-90 / Mt. Baker</td>
<td>No</td>
<td>Social Assistance</td>
</tr>
<tr>
<td>Trident Seafoods Corporation</td>
<td>350</td>
<td>Ballard</td>
<td>Yes</td>
<td>Commercial Fishing</td>
</tr>
<tr>
<td>Glacier Fish Company, LLC</td>
<td>350</td>
<td>Interbay</td>
<td>Yes</td>
<td>Commercial Fishing</td>
</tr>
<tr>
<td>Northwest Protective Service, Inc.</td>
<td>300</td>
<td>Georgetown</td>
<td>No</td>
<td>Armored Vehicle Services</td>
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<tr>
<td>Moisture Festival</td>
<td>282</td>
<td>Ballard</td>
<td>No</td>
<td>Arts, Entertainment &amp; Recreation Sector</td>
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<tr>
<td>Trident Seafoods Corporation</td>
<td>264</td>
<td>Ballard</td>
<td>Yes</td>
<td>Seafood Processing</td>
</tr>
<tr>
<td>Ocean Beauty Seafoods LLC</td>
<td>250</td>
<td>Interbay</td>
<td>Yes</td>
<td>Seafood Processing</td>
</tr>
<tr>
<td>Clipper Seafoods, Ltd.</td>
<td>200</td>
<td>Interbay</td>
<td>Yes</td>
<td>Seafood Processing</td>
</tr>
<tr>
<td>L.A. Deepening Constructors, Ajv</td>
<td>200</td>
<td>Georgetown</td>
<td>Yes</td>
<td>Commercial &amp; Industrial Equipment Rental &amp; Leasing</td>
</tr>
<tr>
<td>Seattle Community Colleges</td>
<td>200</td>
<td>Georgetown</td>
<td>No</td>
<td>Information Collection &amp; Delivery</td>
</tr>
<tr>
<td>Swedish Health Services</td>
<td>200</td>
<td>Georgetown</td>
<td>No</td>
<td>Home Health Care Services</td>
</tr>
<tr>
<td>The Allen Institute For Brain Science</td>
<td>170</td>
<td>Ballard</td>
<td>No</td>
<td>Scientific Research &amp; Development Services</td>
</tr>
<tr>
<td>The Hearst Corporation</td>
<td>165</td>
<td>Interbay</td>
<td>Yes</td>
<td>Newspaper Publishers</td>
</tr>
</tbody>
</table>
The pattern of establishment sizes is very similar across all four Subareas. Most establishments are small, with 2-19 employees. There are a significant number of sole proprietorships, but only a handful of large, 100+ employee establishments in the four study areas.

The pattern is similar in terms of company revenues reported by Subarea – most establishments report revenues in the mid-size range from $100,000 to $1 million per year.
The graphs at left compare the relative magnitude of industrial and commercial segments by Subarea.

Three of the Subareas are dominated by Segment 2 (Local industrial services, distribution and repair) in terms of number establishments (including I-90/Mt. Baker which has more commercial presence than industrial). Interbay, however, has more Segment 3 establishments.

In terms of employment, however, all Subareas but Georgetown are led by Segment 3, with Georgetown led by Segment 2 employment.

Segment 1 employment and establishments are most significant in Georgetown and Ballard respectively.
In terms of reported revenue by firm, Export-Oriented industrial – Segment 3 – is the leader for all Subareas but Georgetown.

The large Segment 3 revenue figure for Interbay includes Ocean Beauty Seafoods and the Dairy Export Company.

It should be noted that 31 of the 2,257 establishments inventoried did not report revenue figures. In addition, some establishments may be reporting revenues generated at other locations.
I-90/Mt. Baker has the highest overall (commercial and industrial combined) employment density.

Interbay’s overall employment density, while likely skewed low due to large, low-employment tracts associated with the BNSF’s Balmer Rail Yard, does nonetheless contain a number of very high-density commercial employment sites such as F5 Networks, Big Fish, and Classmates.com.
The most concentrated use of space across all Subareas appears in the Local Production and Local Services, Distribution & Repair Segments of industrial activities. By contrast, the Export-Oriented Industrial Segment is the least concentrated user of space.

Artisanal activities revealed a surprisingly long tenure, followed by Export-Oriented Industrial. It appears that Artisanal firms may “graduate” to the Export-Oriented category over time. Commercial uses have shorter tenure overall.
4 Inventory by Subarea
Ballard Subarea

The Ballard Subarea includes 252 parcel acres encompassing the industrially-zoned areas along the Lake Washington Ship Canal, extending from the Chittenden Ship Locks east through downtown Ballard, to the Leary corridor ending at Third Avenue. There are approximately 590 establishments employing 7,450 people in commercial and industrial activities.
Top Industrial Employers

Trident Seafoods (HQ)
Commercial fishing and seafood processing

Vaupell Industrial Plastics (HQ)
Plastics for aerospace, defense, medical and commercial applications

Stabbert Maritime (HQ)
Shipbuilding and repair
In the Ballard Subarea, business activity in terms of revenue and employment is dominated by Export-Oriented industrial activities. In terms of employment only, Commercial activities and Local Industrial Services, Distribution & Repair are also significant with 2,602 and 1,685 employees respectively.

While employment levels are similar for Segment 3 and Commercial activities, revenues generated are far higher for Segment 3 Industrial.

Local Production is a smaller presence in terms of all three categories, employing only 192 in Ballard.
4 Inventory by Subarea: BALLARD

Commercial & Industrial Establishment Locations

Ballard Subarea: Commercial & Industrial

Local Production Inventory

All Industrial Establishments
- 411-999 Employees
- 50-99 Employees
- 31-50 Employees
- 10-30 Employees
- 5-19 Employees
- 0-4 Employees

All Commercial Establishments
- 411-999 Employees
- 50-99 Employees
- 31-50 Employees
- 10-30 Employees
- 5-19 Employees
- 0-4 Employees

Source: Hoover’s 2014: Community Attributes

Parks & Open Space
Bodies of Water
Subarea Boundary
4 Inventory by Subarea: BALLARD

Industrial Establishment Locations by Segment

Local Production Inventory
Ballard Subarea: Industrial Segments

1a. Local Production: Artisanal-Craft Establishments
- 411-900 Employees
- 101-250 Employees
- 57-91 Employees
- 19-36 Employees
- 5-18 Employees
- 0-4 Employees

1b. Local Production: Other Establishments
- 411-900 Employees
- 101-250 Employees
- 57-91 Employees
- 19-36 Employees
- 5-18 Employees
- 0-4 Employees

2. Local Industrial Services, Distribution & Repair Establishments
- 411-900 Employees
- 101-250 Employees
- 57-91 Employees
- 19-36 Employees
- 5-18 Employees
- 0-4 Employees

3. Export-Oriented Industrial Establishments
- 411-900 Employees
- 101-250 Employees
- 57-91 Employees
- 19-36 Employees
- 5-18 Employees
- 0-4 Employees

Source: Hoover's 2014 Community Attributes
Establishment Size Profiles

Most industrial establishments in Ballard are small employers, with 220 establishments employing 2 to 19 people. There are a significant number of sole proprietorships (37), but only a handful (6) of large, 100+ employee establishments.

The pattern is similar in terms of firm revenues – more industrial establishments in Ballard (195) report revenues in the mid-size range (from $100,000 to $1 million per year) than the combined total of Small, Large, and Very Large revenue-generating establishments.

Note: Industrial activities only; 1 establishment with 0 employment
Source: Hoover’s 2014; Community Attributes
4 Inventory by Subarea: BALLARD

Ballard Zoning

Note: locations of establishments are approximate and based on geo-coded street addresses.

See slide 113 for descriptions of Seattle’s industrial zones.

Local Production Inventory

Ballard 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
## Top Industries (by Number of Establishments)

<table>
<thead>
<tr>
<th>Primary Industry</th>
<th>Establishments</th>
<th>Revenues (Millions USD)</th>
<th>Employment</th>
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</thead>
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<tr>
<td>Automotive Repair &amp; Maintenance Services</td>
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Note: Industrial activities only; revenue data for some establishments not available
Source: Hoover’s 2014; Community Attributes
### Top Industries (by Revenues)

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<tr>
<th>Primary Industry</th>
<th>Establishments</th>
<th>Revenues (Millions USD)</th>
<th>Employment</th>
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<tr>
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<tr>
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*Note: Industrial activities only; revenue data for some establishments not available*

*Source: Hoover’s 2014; Community Attributes*
### Top Industries (by Employment)

<table>
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<tr>
<td>Plastic &amp; Rubber Product Manufacturing</td>
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<td>Lumber &amp; Plywood Product Manufacturing</td>
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<td>Electrical, Plumbing &amp; Hardware Wholesalers</td>
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<tr>
<td>Collectibles, Giftware &amp; Commemorative Products</td>
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<td>Manufacturing</td>
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<td>8.3</td>
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<td>Commercial Equipment Repair &amp; Maintenance</td>
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<tr>
<td>Fuel Oil Dealers</td>
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<td>13.5</td>
<td>50</td>
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</tbody>
</table>

*Note: Industrial activities only; revenue data for some establishments not available*  
*Source: Hoover’s 2014; Community Attributes*
Interbay Subarea

The Interbay Subarea includes 791 parcel acres encompassing industrially zoned lands along the southern shore of the Lake Washington Ship Canal, including the Port of Seattle’s Fishermen’s Terminal, south through BNSF’s Balmer Yard to Terminal 90-91, and southeast along Elliott Avenue. There are approximately 520 establishments employing 7,750 people in commercial and industrial activities.

Local Production Inventory
Interbay Subarea

Source: Hoover’s 2014: Community Attributes
4 Inventory by Subarea: INTERBAY

GM Nameplate (HQ)
Fabricated metal product manufacturing

Glacier Fish Company
Commercial fishing and seafood processing

Ocean Beauty Seafoods (HQ)
Commercial fishing and seafood processing
In the Interbay Subarea, business activity in terms of employment is dominated by both Export-Oriented industrial and Commercial activities which employ 2,880 and 3,260 respectively.

While employment levels are similar for Segment 3 and Commercial activities, revenues generated are far higher for Segment 3 industrial than any other Segment.

Local Production is a smaller presence in terms of all three categories, employing only 156 at 10 establishments in Interbay.
4 Inventory by Subarea: INTERBAY

Commercial & Industrial Establishment Locations

Local Production Inventory

Ballard Subarea: Commercial & Industrial

Source: Hoover's 2014: Community Attributes
4 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

Source: Hoover's 2014 Community Attributes
Establishment Size Profiles

As in Ballard, most industrial establishments in Interbay are small- to mid-size employers (157 employing from 2-19 people). There are still a significant number of sole proprietorships (26), and only 10 large, 100+ employee establishments.

The pattern is similar in terms of firm revenues – most industrial establishments in Interbay report revenues in the mid-size range (from $100,000 to $1 million per year).

Note: Industrial activities only; 2 establishment with 0 employment
Source: Hoover’s 2014; Community Attributes
Interbay Zoning

Note: locations of establishments are approximate and based on geocoded street addresses.

See slide 113 for descriptions of Seattle’s industrial zones.

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

44
## Top Industries (by Number of Establishments)

<table>
<thead>
<tr>
<th>Primary Industry</th>
<th>Establishments</th>
<th>Revenues (Millions USD)</th>
<th>Employment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Food Wholesalers</td>
<td>18</td>
<td>134.61</td>
<td>216</td>
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<tr>
<td>Wholesale Sector</td>
<td>16</td>
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<td>Commercial Equipment Repair &amp; Maintenance</td>
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<td>12.47</td>
<td>118</td>
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<tr>
<td>Seafood Processing</td>
<td>11</td>
<td>550.957</td>
<td>778</td>
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<td>Commercial Fishing</td>
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<td>Electrical Contractors</td>
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<td>Specialty Contractors</td>
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*Note: Industrial activities only; revenue data for some establishments not available*

*Source: Hoover’s 2014; Community Attributes*
## Top Industries (by Revenues)

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Note: Industrial activities only; revenue data for some establishments not available
Source: Hoover’s 2014; Community Attributes
## Top Industries (by Employment)

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<th>Primary Industry</th>
<th>Establishments</th>
<th>Revenues (Millions USD)</th>
<th>Employment</th>
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<td>Sporting Goods Manufacturing</td>
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<td>Commercial &amp; Heavy Construction Contractors</td>
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<td>Biotechnology Research Services</td>
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</table>

*Note: Industrial activities only; revenue data for some establishments not available*

*Source: Hoover’s 2014; Community Attributes*
I-90/Mt. Baker Subarea

The I-90/Mt. Baker Subarea includes 149 parcel acres encompassing industrially zoned land immediately north of I-90 and east of I-5, as well as mixed industrial and commercially zoned land along the Rainier Boulevard corridor south of I-90 around the Mt. Baker light rail station. There are approximately 330 establishments employing 5,350 people in commercial and industrial activities.

Local Production Inventory
I-90/Mt. Baker Subarea
Top Industrial Employers

Darigold (HQ)
Dairy product processing

Pepsi (HQ)
Soft drink manufacturer

SME Inc. of Seattle (HQ)
Electrical Contractor
In the I-90/Mt. Baker Subarea, business activity in terms of employment is dominated by Commercial activities which employ 3,380 versus the 1,970 employed in all industrial activities combined. (The reason for this is the inclusion of non-industrially zoned lands in the Subarea boundaries which nevertheless contain industrial establishments.)

While employment levels are higher for Commercial activities, revenues generated are higher for the industrial Segments.

Local Production is still a small presence in terms of all three categories, employing only 62 at eight establishments in I-90/Mt. Baker.
4 Inventory by Subarea: I-90 / MT. BAKER

Commercial & Industrial Establishment Locations

Local Production Inventory
Ballard Subarea: Commercial & Industrial

All Industrial Establishments
- 411-900 Employees
- 91-250 Employees
- 37-91 Employees
- 19-36 Employees
- 5-18 Employees
- 0-4 Employees

All Commercial Establishments
- 411-900 Employees
- 91-250 Employees
- 57-91 Employees
- 37-56 Employees
- 19-36 Employees
- 5-18 Employees
- 0-4 Employees

Source: Hoover's 2014 Community Attributes
4 Inventory by Subarea: I-90 / MT. BAKER

Industrial Establishment Locations by Segment

Local Production Inventory
Ballard Subarea: Industrial Segments

1a. Local Production: Artisanal-Craft Establishments
- 411-900 Employees
- 36-99 Employees
- 37-99 Employees
- 19-34 Employees
- 1-18 Employees
- 0-4 Employees

1b. Local Production: Other Establishments
- 411-900 Employees
- 36-99 Employees
- 37-99 Employees
- 19-34 Employees
- 1-18 Employees
- 0-4 Employees

2. Local Industrial Services, Distribution & Repair Establishments
- 411-900 Employees
- 36-99 Employees
- 37-99 Employees
- 37-99 Employees
- 19-34 Employees
- 1-18 Employees
- 0-4 Employees

3. Export-Oriented Industrial Establishments
- 411-900 Employees
- 36-99 Employees
- 37-99 Employees
- 37-99 Employees
- 19-34 Employees
- 1-18 Employees
- 0-4 Employees

Source: Hoover's 2014 Community Attributes

Parks & Open Space
Bodies of Water
Subarea Boundary

52
Again, most industrial establishments in I-90/Mt. Baker are small- to mid-size employers (67 employing from 2-19 people). There are still a significant number of sole proprietorships (12), and only 5 large, 100+ employee establishments. The pattern repeats in terms of firm revenues with most industrial establishments in I-90/Mt. Baker reporting revenues in the medium range (from $100,000 to $1 million per year). Very Large revenue-generating firms comprise a much smaller percentage (6%) than in Ballard and Interbay (16% each).

Note: Industrial activities only
Source: Hoover’s 2014; Community Attributes
I-90/Mt. Baker Zoning

Note: locations of establishments are approximate and based on geo-coded street addresses.

See slide 113 for descriptions of Seattle's industrial zones.

Local Production Inventory
I-90/Mt. Baker 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
## Top Industries (by Number of Establishments)

<table>
<thead>
<tr>
<th>Primary Industry</th>
<th>Establishments</th>
<th>Revenues (Millions USD)</th>
<th>Employment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wholesale Sector</td>
<td>13</td>
<td>6.35</td>
<td>53</td>
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<tr>
<td>Automotive Repair &amp; Maintenance Services</td>
<td>10</td>
<td>3.39</td>
<td>42</td>
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<tr>
<td>Commercial &amp; Heavy Construction Contractors</td>
<td>7</td>
<td>29.100651</td>
<td>81</td>
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<tr>
<td>Food Wholesalers</td>
<td>6</td>
<td>8.8</td>
<td>67</td>
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<tr>
<td>Electrical Contractors</td>
<td>4</td>
<td>27.3</td>
<td>207</td>
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<tr>
<td>Electrical, Plumbing &amp; Hardware Wholesalers</td>
<td>3</td>
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<td>22</td>
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<tr>
<td>Plumbing &amp; HVAC Contractors</td>
<td>3</td>
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<td>27</td>
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<tr>
<td>Janitorial &amp; Carpet Cleaning Services</td>
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<td>Newspaper Publishers</td>
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<td>Dairy Products Manufacturing</td>
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<td>254</td>
<td>292</td>
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<tr>
<td>Soft Drink Manufacturing</td>
<td>2</td>
<td>62.9</td>
<td>715</td>
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</table>

Note: Industrial activities only; revenue data for some establishments not available  
Source: Hoover's 2014; Community Attributes
Top Industries (by Revenues)

<table>
<thead>
<tr>
<th>Primary Industry</th>
<th>Establishments</th>
<th>Revenues (Millions USD)</th>
<th>Employment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dairy Products Manufacturing</td>
<td>2</td>
<td>254</td>
<td>292</td>
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<tr>
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<td>2</td>
<td>62.9</td>
<td>715</td>
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<td>Commercial &amp; Heavy Construction Contractors</td>
<td>7</td>
<td>29.100651</td>
<td>81</td>
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<tr>
<td>Electrical Contractors</td>
<td>4</td>
<td>27.3</td>
<td>207</td>
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<tr>
<td>Commercial &amp; Industrial Equipment Rental &amp; Leasing</td>
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<td>Electrical, Plumbing &amp; Hardware Wholesalers</td>
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<tr>
<td>Wholesale Sector</td>
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<td>6.35</td>
<td>53</td>
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<tr>
<td>Landscaping Services</td>
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<td>4.64</td>
<td>63</td>
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<td>Power Line &amp; Telecommunications Infrastructure</td>
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<tr>
<td>Construction Contractors</td>
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<tr>
<td>Automotive Repair &amp; Maintenance Services</td>
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<td>42</td>
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<tr>
<td>Newspaper Publishers</td>
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<td>3.31</td>
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<tr>
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Note: Industrial activities only; revenue data for some establishments not available
Source: Hoover’s 2014; Community Attributes
## Top Industries (by Employment)

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<th>Establishments</th>
<th>Revenues (Millions USD)</th>
<th>Employment</th>
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<td>715</td>
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<td>Dairy Products Manufacturing</td>
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<tr>
<td>Electrical Contractors</td>
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<tr>
<td>Commercial &amp; Heavy Construction Contractors</td>
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<td>29.100651</td>
<td>81</td>
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<tr>
<td>Commercial &amp; Industrial Equipment Rental &amp; Leasing</td>
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<td>80</td>
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<tr>
<td>Food Wholesalers</td>
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<td>4.64</td>
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<tr>
<td>Bakery Product Manufacturing</td>
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<td>Plumbing &amp; HVAC Contractors</td>
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<td>Construction Contractors</td>
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<td>20</td>
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<tr>
<td>Photographic &amp; Optical Equipment/Supplies Manufacturing</td>
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<td>1.9</td>
<td>15</td>
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<tr>
<td>Glass &amp; Glass Product Manufacturing</td>
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<td>1.1</td>
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</table>

*Note: Industrial activities only; revenue data for some establishments not available*
*Source: Hoover's 2014; Community Attributes*
The Georgetown Subarea includes 513 parcel acres encompassing the neighborhood of Georgetown and the surrounding industrially zoned lands that abut it directly, bounded by I-5 to the east, King County Airport (Boeing Field) to the south, the Duwamish canal to the west, and Dawson Street on the north. There are approximately 810 establishments employing 10,620 people in commercial and industrial activities.
Inventory by Subarea: GEORGETOWN

Top Industrial Employers

Boeing
Aerospace products and parts manufacturing

Ardagh Glass, Inc. (formerly Verallia)
Glass container manufacturing

Manson Construction Co. (HQ)
Heavy civil marine construction and dredging
Establishments, Employment & Revenue by Segment

In the Georgetown Subarea, business activity in terms of employment is dominated by Segment 2 & 3 industrial and Commercial activities which employ 3,760, 3,025 and 3,410 respectively. (As in I-90/Mt. Baker, the Subarea includes non-industrially zoned land, accounting for increased commercial employment.)

Reported revenues for Georgetown firms – both industrial and commercial – were lower overall than in the other three Subareas.

Local Production is a more significant presence in Georgetown, employing 418 at 49 establishments.
4 Inventory by Subarea: GEORGETOWN

Commercial & Industrial Establishment Locations

Local Production Inventory

Ballard Subarea:
Commercial & Industrial

All Industrial Establishments
- 411-900 Employees
- 91-250 Employees
- 37-90 Employees
- 11-36 Employees
- 5-10 Employees
- 0-4 Employees

All Commercial Establishments
- 411-900 Employees
- 91-250 Employees
- 57-90 Employees
- 31-56 Employees
- 19-30 Employees
- 5-18 Employees
- 0-4 Employees

Source: Hoover's 2014 Community Attributes

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4 Inventory by Subarea: GEORGETOWN

Industrial Establishment Locations by Segment

Local Production Inventory
Ballard Subarea: Industrial Segments

1a. Local Production: Artisanal-Craft Establishments
- 411-900 Employees
- 31-299 Employees
- 17-56 Employees
- 19-36 Employees
- 5-18 Employees
- 0-4 Employees

1b. Local Production: Other Establishments
- 411-900 Employees
- 31-299 Employees
- 17-56 Employees
- 19-36 Employees
- 5-18 Employees
- 0-4 Employees

2. Local Industrial Services, Distribution & Repair Establishments
- 411-900 Employees
- 91-299 Employees
- 57-90 Employees
- 37-94 Employees
- 19-36 Employees
- 5-18 Employees
- 0-4 Employees

3. Export-Oriented Industrial Establishments
- 411-900 Employees
- 91-299 Employees
- 57-90 Employees
- 37-94 Employees
- 19-36 Employees
- 5-18 Employees
- 0-4 Employees

Source: Hoover’s 2014 Community Attributes
Most industrial establishments in Georgetown are small- to mid-size employers (321 employing from 2-19 people). There are a large number of sole proprietorships (57), and 9 large, 100+ employee establishments.

Most industrial establishments in Georgetown report revenues in the medium range (from $100,000 to $1 million per year). Very Large revenue-generating firms comprise an even smaller percentage (4%) than in Ballard and Interbay (16% each), and in I-90/Mt. Baker (6%).

Note: Industrial activities only; 2 establishments with 0 employment
Source: Hoover’s 2014; Community Attributes
Georgetown Zoning

Note: locations of establishments are approximate and based on geo-coded street addresses.

See slide 113 for descriptions of Seattle's industrial zones.

Local Production Inventory
Georgetown 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
### Top Industries (by Number of Establishments)

<table>
<thead>
<tr>
<th>Primary Industry</th>
<th>Establishments</th>
<th>Revenues (Millions USD)</th>
<th>Employment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wholesale Sector</td>
<td>119</td>
<td>226.206</td>
<td>1194</td>
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<tr>
<td>Specialty Contractors</td>
<td>17</td>
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<td>Commercial &amp; Heavy Construction Contractors</td>
<td>16</td>
<td>97.189999</td>
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<tr>
<td>Automotive Repair &amp; Maintenance Services</td>
<td>15</td>
<td>5.049</td>
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<tr>
<td>Food Wholesalers</td>
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<td>35.52</td>
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<td>Commercial Printing</td>
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<td>Architectural &amp; Structural Metals Manufacturing</td>
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<td>10.33</td>
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<td>Residential Construction Contractors</td>
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<td>Electrical, Plumbing &amp; Hardware Wholesalers</td>
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<td>45.23</td>
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<td>Bakery Product Manufacturing</td>
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<td>Plumbing &amp; HVAC Contractors</td>
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<td>6</td>
<td>27.55</td>
<td>244</td>
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*Note: Industrial activities only; revenue data for some establishments not available*

*Source: Hoover’s 2014; Community Attributes*
## Top Industries (by Revenues)

<table>
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<tr>
<th>Primary Industry</th>
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<td>119</td>
<td>226.206</td>
<td>1194</td>
</tr>
<tr>
<td>Commercial &amp; Heavy Construction Contractors</td>
<td>16</td>
<td>97.189999</td>
<td>533</td>
</tr>
<tr>
<td>Industrial Equipment Wholesalers</td>
<td>8</td>
<td>45.23</td>
<td>133</td>
</tr>
<tr>
<td>Fabricated Metal Product Manufacturing</td>
<td>3</td>
<td>43.8</td>
<td>218</td>
</tr>
<tr>
<td>Recyclable Material Wholesalers</td>
<td>3</td>
<td>36.97</td>
<td>103</td>
</tr>
<tr>
<td>Electrical Contractors</td>
<td>6</td>
<td>35.77</td>
<td>233</td>
</tr>
<tr>
<td>Food Wholesalers</td>
<td>15</td>
<td>35.52</td>
<td>193</td>
</tr>
<tr>
<td>Ambulance Services</td>
<td>1</td>
<td>34.941701</td>
<td>200</td>
</tr>
<tr>
<td>Lumber &amp; Plywood Product Manufacturing</td>
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<td>61</td>
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<tr>
<td>Highway, Street, &amp; Bridge Construction Contractors</td>
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<td>32.09</td>
<td>17</td>
</tr>
<tr>
<td>Commercial &amp; Industrial Equipment Rental &amp; Leasing</td>
<td>6</td>
<td>27.55</td>
<td>244</td>
</tr>
<tr>
<td>Electrical, Plumbing &amp; Hardware Wholesalers</td>
<td>8</td>
<td>25.74</td>
<td>102</td>
</tr>
<tr>
<td>Machinery Manufacturing</td>
<td>3</td>
<td>21.9</td>
<td>120</td>
</tr>
<tr>
<td>Chemical Wholesalers</td>
<td>4</td>
<td>19.66</td>
<td>43</td>
</tr>
<tr>
<td>Plastic &amp; Rubber Product Manufacturing</td>
<td>2</td>
<td>16.4</td>
<td>79</td>
</tr>
<tr>
<td>Specialty Contractors</td>
<td>17</td>
<td>14.677</td>
<td>132</td>
</tr>
<tr>
<td>Concrete &amp; Masonry Contractors</td>
<td>4</td>
<td>13.77</td>
<td>35</td>
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<td>Electrical Products Wholesalers</td>
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<tr>
<td>Architectural &amp; Structural Metals Manufacturing</td>
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<td>10.33</td>
<td>79</td>
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<tr>
<td>Construction Machinery Manufacturing</td>
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<td>10</td>
<td>60</td>
</tr>
</tbody>
</table>

*Note: Industrial activities only; revenue data for some establishments not available*

*Source: Hoover’s 2014; Community Attributes*
## Top Industries (by Employment)

<table>
<thead>
<tr>
<th>Primary Industry</th>
<th>Establishments</th>
<th>Revenues (Millions USD)</th>
<th>Employment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wholesale Sector</td>
<td>119</td>
<td>226.206</td>
<td>1194</td>
</tr>
<tr>
<td>Aerospace Products &amp; Parts Manufacturing</td>
<td>1</td>
<td>0</td>
<td>831</td>
</tr>
<tr>
<td>Converted Paper Products Manufacturing</td>
<td>2</td>
<td>0.8</td>
<td>607</td>
</tr>
<tr>
<td>Commercial &amp; Heavy Construction Contractors</td>
<td>16</td>
<td>97.189999</td>
<td>533</td>
</tr>
<tr>
<td>Commercial &amp; Industrial Equipment Rental &amp; Leasing</td>
<td>6</td>
<td>27.55</td>
<td>244</td>
</tr>
<tr>
<td>Electrical Contractors</td>
<td>6</td>
<td>35.77</td>
<td>233</td>
</tr>
<tr>
<td>Fabricated Metal Product Manufacturing</td>
<td>3</td>
<td>43.8</td>
<td>218</td>
</tr>
<tr>
<td>Ambulance Services</td>
<td>1</td>
<td>34.941701</td>
<td>200</td>
</tr>
<tr>
<td>Food Wholesalers</td>
<td>15</td>
<td>35.52</td>
<td>193</td>
</tr>
<tr>
<td>Nonmetallic Mineral Product Manufacturing</td>
<td>3</td>
<td>1.6</td>
<td>148</td>
</tr>
<tr>
<td>Industrial Equipment Wholesalers</td>
<td>8</td>
<td>45.23</td>
<td>133</td>
</tr>
<tr>
<td>Specialty Contractors</td>
<td>17</td>
<td>14.677</td>
<td>132</td>
</tr>
<tr>
<td>Machinery Manufacturing</td>
<td>3</td>
<td>21.9</td>
<td>120</td>
</tr>
<tr>
<td>Commercial Printing</td>
<td>12</td>
<td>9.638766</td>
<td>115</td>
</tr>
<tr>
<td>Timber Operations</td>
<td>1</td>
<td>0</td>
<td>114</td>
</tr>
<tr>
<td>Recyclable Material Wholesalers</td>
<td>3</td>
<td>36.97</td>
<td>103</td>
</tr>
<tr>
<td>Electrical, Plumbing &amp; Hardware Wholesalers</td>
<td>8</td>
<td>25.74</td>
<td>102</td>
</tr>
<tr>
<td>Grain Milling</td>
<td>1</td>
<td>0</td>
<td>88</td>
</tr>
<tr>
<td>Airport Operations</td>
<td>2</td>
<td>0.17</td>
<td>81</td>
</tr>
<tr>
<td>Bus Transportation Services</td>
<td>1</td>
<td>0</td>
<td>80</td>
</tr>
</tbody>
</table>

*Note: Industrial activities only; revenue data for some establishments not available*

*Source: Hoover’s 2014; Community Attributes*
5 Market Analysis
Office and Retail uses pay significantly higher lease rates, on average, across the selected subareas. Flex space appears to command a premium over industrial rents, which are the lowest of the four development types. However, industrial lease rates appear to be more stable than other uses, which show some volatility over time.
Vacancy rates for all four development types peaked in late 2009 or early 2010, at the height of the recession. For most uses, vacancy rates increased by a factor of three or four from their pre-recession low in 2006 or 2007, but Flex uses were hit disproportionately hard, with vacancy rates climbing from 1.41% to 13.56% during this span.
As would be expected, a general slowing of development activity during and after the recession severely limited deliveries. This applied to all development types, though a couple of office projects have been developed post-recession.
5 Market Analysis

Industrial Development Type

Industrial Building Area by Subarea

Transaction Summary (12/2013-12/2014)

Number of Property Sales: 35
Number of Lease Executions: 41
Average Lease Size (SF): 4,802

Largest Sales (by Price):

<table>
<thead>
<tr>
<th>Property Address</th>
<th>Subarea</th>
<th>Sale Date</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>801 NW 48th St</td>
<td>Ballard</td>
<td>7/24/2014</td>
<td>$10,250,000</td>
</tr>
<tr>
<td>2001 W Garfield St</td>
<td>Interbay</td>
<td>11/13/2013</td>
<td>$8,454,587</td>
</tr>
<tr>
<td>361 W Ewing St</td>
<td>Interbay</td>
<td>11/1/2013</td>
<td>$3,720,000</td>
</tr>
<tr>
<td>2400 W Commodore Way</td>
<td>Interbay</td>
<td>7/29/2014</td>
<td>$3,550,000</td>
</tr>
<tr>
<td>300 S Bennett St</td>
<td>Georgetown</td>
<td>2/20/2014</td>
<td>$2,050,000</td>
</tr>
</tbody>
</table>
Market Analysis

Industrial Development Type ...continued

Vacancy Rate by Subarea

Lease Rate by Subarea

Industrial Development Type Summary:

The I-90/Mt. Baker subarea has the least robust industrial sector, with the lowest rentable building area, the highest vacancy rates and relatively low lease rates.

Georgetown has substantially more industrial building area than Ballard and Interbay, but all three of these subareas appear to be desirable to industrial users, as evidenced by their low (<3%) vacancy rates.

Lease rates are significantly higher in Ballard than in any of the other subareas; this is likely due to significant ongoing redevelopment, which creates upward pressure for land prices and rental rates.
5 Market Analysis

**Flex Development Type**

**Transaction Summary (12/2013-12/2014)**

Number of Property Sales: 4

Number of Lease Executions: 17

Average Lease Size (SF): 2,799

Largest Sales (by Price):

<table>
<thead>
<tr>
<th>Property Address</th>
<th>Subarea</th>
<th>Sale Date</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>5506 6th Ave S</td>
<td>Georgetown</td>
<td>12/30/2013</td>
<td>$4,590,000</td>
</tr>
<tr>
<td>940 S Harney St</td>
<td>Georgetown</td>
<td>1/29/2014</td>
<td>$1,875,000</td>
</tr>
<tr>
<td>1222-1226 S Angelo St</td>
<td>Georgetown</td>
<td>9/12/2014</td>
<td>$1,695,000</td>
</tr>
</tbody>
</table>

**Flex Building Area by Subarea**

- Interbay
- Georgetown
- I-90/Mt. Baker
- Ballard
The “flex” sector is the smallest sector in most subareas, though the sector has a significant representation in Interbay in the form of the former Amgen campus. Flex users tend to be larger than users in other sectors; the relatively large size of the average tenant creates some volatility in the data shown, since the relocation of one large tenant can have a significant impact on average lease and vacancy rates across a subarea.

Nevertheless, flex space across the subareas seems to command rents of about $13-$15 per square foot, which is higher than industrial uses but lower than office and retail.
5 Market Analysis

Office Development Type

Transaction Summary (12/2013-12/2014)

Number of Property Sales: 13
Number of Lease Executions: 59
Average Lease Size (SF): 2,959

Largest Sales (by Price):

<table>
<thead>
<tr>
<th>Property Address</th>
<th>Subarea</th>
<th>Sale Date</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>4241 21st Ave W</td>
<td>Interbay</td>
<td>1/16/2014</td>
<td>$2,450,000</td>
</tr>
<tr>
<td>901 Rainier Ave S</td>
<td>I-90/Mt. Baker</td>
<td>10/23/2013</td>
<td>$2,080,000</td>
</tr>
<tr>
<td>815 Rainier Ave S</td>
<td>I-90/Mt. Baker</td>
<td>3/30/2014</td>
<td>$1,500,000</td>
</tr>
</tbody>
</table>
Vacancy rates for office developments vary widely by subarea. They appear especially high in Interbay, though the dramatic increase in rentable building area in 2009-2010 is coordinated with a spike in vacancy, suggesting that new development came online and has been slowly absorbed. If this is case, vacancy in Interbay may begin to trend down as the space is absorbed.

There is tighter clustering of lease rates, as most subareas generate office rents between $20-$30 per square foot. Where these rents are particularly high, there may be greater incentives to convert industrial land to office uses, especially if the zoning already allows such a change.
5 Market Analysis

Retail Development Type

Transaction Summary (12/2013-12/2014)

Number of Property Sales: 12
Number of Lease Executions: 9
Average Lease Size (SF): 5,017

Largest Sales (by Price):

<table>
<thead>
<tr>
<th>Property Address</th>
<th>Subarea</th>
<th>Sale Date</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>437 N 34th St</td>
<td>Ballard</td>
<td>3/31/2014</td>
<td>$11,600,000</td>
</tr>
<tr>
<td>2805 Rainier Ave S</td>
<td>I-90/Mt. Baker</td>
<td>4/4/2014</td>
<td>$3,054,000</td>
</tr>
<tr>
<td>2840 NW Market St</td>
<td>Ballard</td>
<td>8/20/2014</td>
<td>$1,835,000</td>
</tr>
</tbody>
</table>
Retail Development Type ...continued

Retail Development Type Summary:

Retail vacancy rates are highest in Ballard, which may suggest that the supply of retail space is sufficient to accommodate demand. All other subareas have relatively low retail vacancy, at 3% or less. At the same time, lease rates are higher in Ballard than in the other subareas. Lower lease rates for retail uses outside of Ballard suggest these subareas are not hubs for high-end retail. By the same token, Ballard may be a destination retail location while other subareas are more local-serving.
6 Case Studies
6 Case Studies

Overview

1. Scott Galvanizing  
   Year Founded: 1940  
   Employees: 20  
   Sector: Metal Coating  
   Case Excerpt: After 50 years in Ballard, Scott Galvanizing chose to end its lease and build a new 28,500 SF facility on a vacant 3.5 acre site in Arlington, WA (6010 199th St. N.E.).

2. Hisaye / Glassworks  
   Year Founded: 1990  
   Employees: 4  
   Sector: Architectural Art Glass  
   Case Excerpt: The business chose its current location based on the affordable rents, the availability of parking and the overall vibe of the building. The large number of multi-family housing planned and development around the business was a matter of growing concern.

3. 12th Avenue Iron  
   Year Founded: 2006  
   Employees: 6  
   Sector: Custom Forging & Design  
   Case Excerpt: The business moved from its former location on Capitol Hill since rents were increasing and parking costs were going up significantly (employees were paying close to $800 a month for parking).

4. Green Dolphin Ent.  
   Year Founded: 1980  
   Employees: 1  
   Sector: Custom Furniture Mfg.  
   Case Excerpt: This small business moved from an older building in Fremont to its current space for amenities such as central heating and larger access doors. Rents are higher in the new space but the owner is able to operate more efficiently and make up the cost differential.

5. Status Ceramics  
   Year Founded: 1986  
   Employees: 8  
   Sector: Clay Product Mfg.  
   Case Excerpt: The business chose its current location based on proximity to its distributor, low cost and the presence of other similar manufacturers in the Seattle Design Center.
6. Touchfire  
**Year Founded:** 2010  
**Employees:** 3  
**Sector:** Computer Equipment Mfg.  
**Case Excerpt:** The company develops prototypes in Seattle, using local talent and resources, such as CNC machines and 3D printers, then works with its partners in China to produce items at a mass scale.

7. DataPro  
**Year Founded:** 1985  
**Employees:** 20  
**Sector:** Computer Equipment Mfg.  
**Case Excerpt:** They chose to stay in Ballard so that the owner and most employees could continue to walk to work. Having a highly skilled workforce is important to the business and retaining its employees was critical.

8. Prism Designs  
**Year Founded:** 1992  
**Employees:** 7  
**Sector:** Toy & Game Manufacturing  
**Case Excerpt:** The business is a warehouse/distribution service selling products it designs but are manufactured overseas. The business chose its current location based on the cost of doing business, since it now owns the building it is located in.

9. Meyer Wells  
**Year Founded:** 2006  
**Employees:** 26  
**Sector:** Furniture Manufacturing  
**Case Excerpt:** While in Seattle, the company sourced its supplies from companies in the area; with its relocation south, it has shifted its sourcing accordingly. The company would prefer to be in or near Seattle as long as they could find a single location with an office, workshop, showroom and lumber mill.

10. Classic Art Foundry  
**Year Founded:** 2012  
**Employees:** 2  
**Sector:** Metal Service Centers  
**Case Excerpt:** The business chose its current location/building based on a large space being available. It was previously in a smaller space in Magnolia (Interbay).
## Touchfire

<table>
<thead>
<tr>
<th>Facility:</th>
<th><img src="image" alt="Facility Image" /></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Industry:</strong></td>
<td>Computer Equipment Mfg.</td>
</tr>
<tr>
<td><strong>Subarea:</strong></td>
<td>Ballard</td>
</tr>
<tr>
<td><strong>Segment:</strong></td>
<td>Export-Oriented Industrial</td>
</tr>
<tr>
<td><strong>Address:</strong></td>
<td>1117 NW 54th Street</td>
</tr>
<tr>
<td><strong>Revenues:</strong></td>
<td>$1,000,000</td>
</tr>
<tr>
<td><strong>Employees:</strong></td>
<td>3</td>
</tr>
<tr>
<td><strong>Founded:</strong></td>
<td>2010</td>
</tr>
<tr>
<td><strong>Person Interviewed:</strong></td>
<td>Steven Isaacs, Co-founder</td>
</tr>
<tr>
<td><strong>Date Published:</strong></td>
<td>January 13, 2015</td>
</tr>
</tbody>
</table>
Touchfire is a three-employee business located at 1117 NW 54th Street in the Ballard subarea. The company makes keyboards, covers and other accessories for Apple’s iPad. The founders initially funded their business through a Kickstarter campaign that raised over $200,000 in 2011. They chose their current location, which they share with a sign making company (Studio 3 Signs), based on cost, space and proximity to its founders’ homes. Proximity to workforce, customer base or the presence of foot traffic did not factor into their choice of location.

In early 2014, the business moved into its 2,000 SF leased space that has an office mezzanine level with a warehousing area below. They previously operated out of one of the founder’s Redmond apartment but required a larger area to receive shipments of their products, which are manufactured in China. The company develops prototypes in Seattle, using local talent and resources, such as CNC machines and 3D printers, then works with its partners in China to produce items at a mass scale.

The company first manufactured its products in Los Angeles after finding it unfeasible to have them made in Seattle. Manufacturers in Seattle lacked the equipment and capacity to produce the components their products require, whereas LA’s multitude of manufacturers and access to the Port of Long Beach provided the company with everything it needed. Eventually, they outsourced their manufacturing because China was more cost-effective and has a robust supply chain for consumer electronics. They use their Ballard location to receive products from China and then ship them to customers worldwide as a strategy for maintaining good customer service.

While looking for this space, the company found it challenging to find a small, reasonably-priced warehousing facility in other areas of the city. They were not aware of the city’s various industrial areas during their search and felt that the City could do more to promote them. Space in their area seems to be readily available, so they do not think it would be a problem to stay in Ballard. They like their building because it has many windows and expect to stay there for the foreseeable future, though having a loading dock would be helpful. Since they often run out of inventory, their current space is just the right size for their purposes. The business would like to be able to manufacture more of their parts in Seattle in the future and continues to explore this possibility.
DataPro

Industry: Computer Peripheral Equipment Mfg.
Subarea: Ballard
Segment: Export-Oriented Industrial
Address: 933 NW 49th Street
Revenues: $3,300,000
Employees: 20
Founded: 1985

Person Interviewed: James Sherman, Owner
Date Published: January 8, 2015

Source: Google Earth, 2014
DataPro International is an approximately 20-employee business located at 933 NW 49th Street in the Ballard subarea. The company started making custom wall plates and panel-mount cables in the owner’s garage in 1986. In 2013, the company began construction of an 11,738 SF headquarters building on three vacant parcels that the owner purchased in Ballard 2012. It moved from its leased space at 1144 NW 52nd Street into the new facility in fall of 2014.

They chose to stay in Ballard so that the owner and most employees could continue to walk to work. Having a highly skilled workforce is important to the business and retaining its employees was critical. Its customers are scattered throughout the world, so proximity to customers was not a significant factor in deciding where to locate. Since they made a significant investment in buying land and building their own facility, they are likely to stay in the same location for the foreseeable future.

The company expressed some frustration about working with the City regarding permitting policies and services and business regulations in general, though no details were provided. Also, the lack of coverage in the immediate neighborhood by the police department was mentioned as a problem.
Scott Galvanizing Co. Inc. (recently relocated to Arlington)

Facility:

Industry: Metal Coating
Subarea: Ballard (formerly)
Segment: Local Production - Other
Address: 1520 NW Leary Way (formerly)
Revenues: $1,400,000
Employees: 20
Founded: 1940

Source Interview: Puget Sound Business Journal
Date Published: Oct. 14th, 2013
Case Studies

Scott Galvanizing Co. Inc.

After 50 years in Ballard, Scott Galvanizing chose to end its lease and build a new 28,500 SF facility on a vacant 3.5 acre site in Arlington, WA (6010 199th St. N.E.). The approximately $10 million project, which opened in early 2014, is twice the size of its former Ballard location.

The company cited the recent growth in retail and residential development in the neighborhood, lack of parking and increasingly stringent environmental regulations as its reasons for relocating to Snohomish County. Its primary challenge involved preventing runoff from zinc-coated items in the facility’s outdoor storage yard. They attempted to address the problem, but the company felt the City, specifically Seattle Public Utilities, preferred for them to leave rather than work with them. Instead of retrofitting their old facility, they decided to invest in a completely new, state-of-the-art facility in hopes of preventing future regulatory problems. The company initially looked at properties in the south end, but they were too expensive, resulting in the move north.

The departure of Scott Galvanizing leaves only one other large-scale galvanizing company, on the Duwamish River, located within Seattle city limits. Though the loss will impact Ballard’s shipbuilding industry, forcing those businesses to transport their products farther for galvanizing services, most of Scott Galvanizing’s customers are not local and will not be affected by the change. The company stated that it expected to retain most of its current workers, as most of them live up north, double its employment to between 50 and 60 and expand its processing capacity by five to 10 times.

Summary:

Above: Scott Galvanizing’s former Ballard facility

Above: Scott Galvanizing’s new Arlington facility
Prism Designs, Inc.

Facility: 

Source: Google Earth, 2014

Industry: Toy & Game Manufacturing
Subarea: Interbay
Segment: Local Production - Artisanal
Address: 4214 24th Ave West
Revenues: $860,000
Employees: 7
Founded: 1992

Person Interviewed: Sandy Streeper, Employee
Date Published: January 13th, 2015
Prism Designs, Inc.

Summary:
Prism Designs Inc. is a seven-employee kite design and distribution business located at 4214 24th Ave West in the Interbay subarea. The business is a warehouse/distribution service selling products it designs but are manufactured overseas. The business chose its current location based on the cost of doing business, since it now owns the building it is located in. Proximity to workforce, customer base or the presence of foot traffic did not factor into their choice of location.

The business owns the building it is located in and rents out spaces to an auto-restoration service and a manufacturer of scuba equipment. The company was founded in 1992 and moved to Interbay from Fremont in 2002.

The building has a loading dock and can be easily accessed by shipping companies like UPS and FedEx. Parking is also available on site. Overall, they are happy in their current location in Interbay and plan to remain in the area for the foreseeable future.
Meyer Wells (recently consolidated from Interbay to Sumner)

Facility: [Image]

Industry: Furniture Manufacturing
Subarea: Interbay (formerly)
Segment: Local Production - Artisanal
Address: 1600 W. Armory Way (formerly)
Revenues: $2,900,000
Employees: 26
Founded: 2006

Person Interviewed: John Wells, Owner
Date Published: January 9th, 2015

Source: Google Earth, 2014
Meyer Wells

Summary:
Meyer Wells is an approximately 20-employee business formerly located at 1600 W. Armory Way in the Interbay subarea. The company started crafting furniture from reclaimed wood in its Seattle facility in 2006 and opened another manufacturing plant in Sumner in 2010. It also has a saw mill and lumber yard in Graham that is part of an owner’s property. Last year, the business consolidated operations into its 30,000 SF Sumner factory, closing its Seattle workshop. When the owners first signed their lease, they were aware of the zoning changes and knew that the facility would eventually be redeveloped, so the decision to move all manufacturing operations to Sumner was part of a larger strategy to reduce costs and increase efficiency.

While in Seattle, the company sourced its supplies from companies in the area; with its relocation south, it has shifted its sourcing accordingly. They were able to retain all of their Seattle employees and are providing additional compensation to those who now have a longer commute. The company would prefer to be in or near Seattle as long as they could find a single location with an office, workshop, showroom and lumber mill. As most of their customers are in the Seattle area, they plan to open a sales office downtown sometime in 2015. Given that the move alone would likely cost around half a million dollars, the probability of the company returning to Seattle is low.

The company considered their previous location in Interbay to be excellent and had no issues with conflicting adjacent uses. In their earlier years, the proximity to local manufacturers for supplies, such as hardware, was extremely important. They now have most supplies delivered. The Sumner plant is located in a business park, a much different environment than its original space.
6 Case Studies

Classic Art Foundry (relocated to Duwamish)

Facility: [Image]

Source: Google Earth, 2014

Industry: Metal Service Centers
Subarea: Interbay (formerly)
Segment: Local Production – Artisanal
Address: 9688 Martin Luther King Junior Way
Revenues: $200,000
Employees: 2
Founded: 2012

Person Interviewed: Ion Onutan, Owner
Date Published: Jan. 12th, 2015
Classic Art Foundry

Summary:
Classic Art Foundry is a three-employee business located at 9688 Martin Luther King Junior Way South in Seattle.

The business chose its current location/building based on a larger space being available. It was previously in a smaller space in Magnolia. Access to transportation was another but lower priority factor. Proximity to workforce, customer base, other similar uses, or the presence of foot traffic did not factor into their choice of location.

The business rents its current 10,000 SF space. In addition to the large floor area, the main feature the business values in the building is the presence of a loading dock. It expects to remain in its current location for the foreseeable future and has enough space to expand in place. Moving artwork is such a labor-intensive process that the owner prefers to not move at all if possible.

No challenges with adjacent uses were reported.
Hisaye Inc. / Glassworks

Facility:

Source: Google Earth, 2014

Industry: Architectural Art Glass
Subarea: I-90/Mt. Baker
Segment: Local Production - Artisanal
Address: 927 Rainier Ave South
Revenues: $400,000
Employees: 4
Founded: 1990

Person Interviewed: Tish Oye, Owner
Date Interviewed: Dec. 17th, 2014
Hisaye Inc. / Glassworks

Summary:

Glassworks Inc/ Hisaye is a four-employee business located at 927 Rainier Avenue South in Seattle.

The business chose its current location based on the affordable rents, the availability of parking and the overall vibe of the building. Access to transportation was another but lower priority factor. Proximity to workforce, customer base, other similar uses, or the presence of foot traffic did not factor into their choice of location.

The business owns its current 8500 SF space. It was designed as an office building but the owner was able to renovate it to suit their needs. In addition to the large floor area, the main feature the business values in the building is the mix of uses – they have a manufacturing space as well as a showroom. It expects to remain in their current location for the foreseeable future and has enough space to expand in place.

Increasing traffic that makes it harder to get things in and out efficiently was cited as an ongoing issue. No challenges with adjacent uses were reported though the large number of multi-family housing planned and in development around the business was seen as a matter of growing concern.
Green Dolphin Enterprises

Industry: Custom Furniture Manufacturing
Subarea: I-90/Mt. Baker
Segment: Local Production - Artisanal
Address: 1419 South Jackson Street
Revenues: $60,000
Employees: 1
Founded: 1980

Person Interviewed: Tom Whitaker, Owner
Date Interviewed: Dec. 17th, 2014

Source: Google Earth, 2014
Green Dolphin Enterprises

Green Dolphin Enterprises is a single-employee business located in the Rainier Oven Building on 1419 South Jackson Street in Seattle. It specializes in custom residential and commercial furniture, cabinetry and fine woodworking, as well as boat building, repair and alteration.

This small business moved from an older building in Fremont to its current space for amenities such as central heating and larger access doors. Rents are higher in the new space but the owner is able to operate more efficiently and make up the cost differential. Access to transportation was another but lower priority factor. The business chose to remain in Seattle to be close to suppliers in Georgetown. Some of these suppliers have since moved from Georgetown to Kent Valley or even further south but the current Central District location’s easy transportation access has helped maintain efficient connections. The owner lives in Ballard and continues to access resources in Ballard such as Ballard Industrial as well.

The business rents its 1600 SF space. The building has an interesting mix of uses with office spaces for non-profit and architect, as well as maker spaces for an artist and a custom drapery business. It also includes residential uses; the landlord lives in the building. The business has sufficient room to expand, and has no plans to move in the foreseeable future.

The business is happy in its current location, and no land use challenges or policy changes were cited during the interview.
12th Ave. Iron

Facility:

Source: Google Earth, 2014

Industry: Custom Forging & Design
Subarea: I-90/Mt. Baker
Segment: Local Production - Artisanal
Address: 1423 South Dearborn Street
Revenues: $800,000
Employees: 6
Founded: 2006

Person Interviewed: Mark Christianson

Date Interviewed: Dec. 16th, 2014
12th Avenue Iron

Summary:

12th Avenue Iron is a six-employee business located at 1423 South Dearborn Street in Seattle. The business moved from its former location on Capitol Hill since rents were increasing and parking costs were going up significantly (employees were paying close to $800 a month for parking). This was the main driver of their location change. Access to transportation was another but lower priority factor. Proximity to workforce, customer base, other similar uses, presence of foot traffic or urban design features such as the vibe of the building did not factor into their choice of location.

They rent their current 10,000 SF space but plan to buy the building in the near future. The current space has high ceilings and enough room for staging and fabrication tables. They expect to remain in their current location for the foreseeable future since the rents are affordable and there is plentiful parking available. The costs of moving a metal shop are too high for them to consider moving, but if they were to move, their preferred location would be South Park.

The business is happy in their current location, and no land use challenges or policy changes were cited during the interview.
## Status Ceramics

<table>
<thead>
<tr>
<th>Facility:</th>
<th>Clay Product Manufacturing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Industry:</td>
<td>Clay Product Manufacturing</td>
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<tr>
<td>Subarea:</td>
<td>Georgetown</td>
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<tr>
<td>Segment:</td>
<td>Export-Oriented (formerly Local Production)</td>
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<tr>
<td>Address:</td>
<td>927 South Homer Street</td>
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<tr>
<td>Revenues:</td>
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<td>Employees:</td>
<td>8</td>
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<tr>
<td>Founded:</td>
<td>1986</td>
</tr>
<tr>
<td>Person Interviewed:</td>
<td>Richard Scott, Owner</td>
</tr>
<tr>
<td>Date Published:</td>
<td>Jan. 7th, 2015</td>
</tr>
</tbody>
</table>

*Source: Google Earth, 2014*
Status Ceramics is a seven-employee business located at 927 S. Homer Street in the Georgetown subarea. The company was founded in 1986 on Bainbridge Island. The business chose its current location based on proximity to its distributor, low cost and the presence of other similar manufacturers in the Seattle Design Center. Proximity to workforce, customer base or the presence of foot traffic did not factor into their choice of location.

The business subleases its current 8,000 SF space from Monarch Trading Corporation. They were previously located across the street at a facility that was half the size and moved a couple of years ago to expand production. They have a seven year lease, with an option to extend it another five years, and will likely stay in the same location for at least the entirety of the lease period. If it could acquire additional equipment, however, it would seek to relocate to a larger facility. The company does not believe it would be able to stay in the same area because it took them at least six months to find their current location.

Though the space is adequate, building conditions are less than ideal, causing them to incur additional costs to heat individual workstations. The access road to their facility is in complete disrepair, making it difficult for truck traffic. Additionally, a Greek yogurt business obstructs traffic flow by leaving garbage on the road and having customers that park in the path. Parking in general is problematic, especially adjacent to the railroad tracks. The company would like to see parking more clearly defined so as to reduce conflicts with freight mobility. Overall, they greatly enjoy being in Georgetown and would like to be able to remain in the area as they aim to grow their business.
7 Strategic Themes
Key Questions for the future of local production in Seattle:

1. What are the needs of industrial businesses in the four Seattle study areas?

2. What are the primary challenges for industrial businesses in the study areas?

3. Do industrial businesses in the study areas prefer a Seattle location; if so, why?

4. Why have industrial businesses left the study areas, and what has been the impact?

In Conclusion…

What policies or incentives could help strengthen local production activities in the study areas?
7 Strategic Themes

Key Questions for the future of local production in Seattle

1. What are the needs of industrial businesses in the four Seattle study areas?

   The following elements were encountered in Case Study interviews and research regarding the needs of industrial businesses in the four Seattle local production study areas:

   > Affordable rents ( -Hisaye, Status Ceramics, 12th Avenue Iron )
   > Available and affordable parking ( -Prism Designs, Hisaye, Status Ceramics, 12th Ave. Iron)
   > Proximity to workforce ( -TouchFire)
   > Access to transportation ( -12th Avenue Iron)
   > Adequate infrastructure (especially streets, street lighting, and broadband internet)
   > Mix or flexibility of spaces under one roof (eg, office, workshop, showroom and mill in same building -Meyer Wells)
   > Presence of like businesses (industry agglomeration; -Status Ceramics)
   > Especially artisanal: use of “maker spaces” or “fab labs” for prototyping and product development
   > Especially artisanal: proximity to founders’ homes (mentioned as a factor with startups)
   > Urban character (specifically, a distaste for business park environments)
   > Loading docks, high-clearance ceilings, on-site parking, windows, central heating
Key Questions for the future of local production in Seattle

2. What are the primary challenges for industrial businesses in the study areas?

The following elements were encountered in Case Study interviews and research regarding the primary challenges for industrial businesses in the four Seattle local production study areas:

- Lack of parking, or expensive parking (12th Avenue Iron)
- Lack of parking enforcement (Status Ceramics)
- Increased traffic (related to mixed-use development; Hisaye)
- Concern / anticipation about future adjacency conflicts (versus actual conflicts; Hisaye)
- Old or obsolete buildings & facilities (Status Ceramics)
- Lack of suitable buildings or sites for expansion (Classic Art Foundry, Status Ceramics)
- Stringent environmental regulations (Scott Galvanizing)
- Unwillingness of Seattle regulators to work with businesses on compliance solutions (DataPro & Scott Galvanizing)
- Condition of streets and roads in industrial areas (Status Ceramics)
- Many suppliers have moved from the Duwamish or Ballard to the Kent Valley (Green Dolphin)
- Lack of police patrol in neighborhood (DataPro)
7 Strategic Themes

Key Questions for the future of local production in Seattle

3. Do industrial businesses in the study areas prefer a Seattle location; if so, why?

The following elements were encountered in Case Study interviews and research regarding a City of Seattle location in the four Seattle local production study areas. The preference of a Seattle location was split and seemed linked to the level on contact necessary with other businesses, suppliers, or local urban markets:

- Links to a great diversity of suppliers (such as hardware suppliers for Green Dolphin furniture makers)
- Significant facility and equipment investments that are difficult to move or replicate (−DataPro)
- Short commute & transit options for area workers (−Touchfire)
- Presence of educated or skilled employees in the Seattle area (−DataPro)
- Urban character (versus suburban or business park character; Meyer Wells strongly preferred Interbay to Sumner business park location)
- Presence of similar or up- and down-stream manufacturers and fabricators (such as Status Ceramics in Georgetown’s Seattle Design Center)
- Availability of older building typologies and a location suitable for a mix of activities (versus a homogenous or isolated business park location)
- Two businesses – Touchfire & Prism Designs, prefer to design, distribute and service from Seattle only, doing their manufacturing overseas due to cost; shipping and servicing locally allows for good service and delivery times
7 Strategic Themes

Key Questions for the future of local production in Seattle

4. Why have industrial businesses left the study areas, and what has been the impact?

The following elements were encountered in Case Study interviews and research regarding leaving one of the four Seattle local production study areas:

- Rezoning (Meyer Wells, Interbay)
- Lack of or expensive parking (12th Avenue Iron moving from Capitol Hill)
- Rising rents
- Increased traffic
- Environmental regulation & enforcement (Scott Galvanizing)
- Lack of suitable buildings or sites for expansion (Status Ceramics, Classic Art Foundry)
- Retail and Residential Development (Scott Galvanizing)

Impacts to the local Seattle economy and industrial “food-chain” related to re-locations out of Seattle that were mentioned in interviews included:

- Loss of an integral service, product, or process for up- or down-stream producers (Scott Galvanizing was one of only two galvanizers in Seattle and their re-location has affected many in the ship-building and metal fabrication industries in Ballard and Interbay)
- Business that used to source with local suppliers – primarily local producers – now use non-Seattle suppliers, weakening other local industrial segments
What policies or incentives could help strengthen local production activities centered in Ballard, Interbay, I-90/Mt. Baker & Georgetown?

> The original intent of IC zones as a mix of commercial and industrial businesses is being compromised by excessive single-use office development. Consider implementing maximum size limits for office uses in Seattle IC zones.

> Re-evaluate whether parcel-based size limits are the best way to regulate the impact of non-industrial uses in industrial districts. Large parcels can be sub-divided into multiple smaller lots to avoid size limits.

> Size limits on non-industrial uses in industrial zones do not apply if these uses are accessory to a principal use that is not restricted. Consider regulation of both principal and accessory non-industrial uses, and consider limits on expansion of non-industrial accessory uses after project completion.

> Spillover impacts – including increased traffic and reduced parking availability – from new commercial, residential and mixed-used development adjacent to industrial districts is putting pressure on the continued viability of industrial businesses. Strengthen the IB zone as a tool to buffer industrial districts from neighboring commercial and residential districts by increasing limits on non-industrial uses.

> Spot-rezoning of industrial sites in Seattle is undermining the integrity of some industrial areas. Consider adding to the criteria required to re-zone industrially-zoned parcels in Seattle. Additional criteria could include consideration of the impact of the re-zone on parking and traffic in the wider industrial area, or that the impact on surrounding parcels or the district as a whole. Other criteria could include demonstration that the use cannot be accommodated elsewhere.

> Many local production uses have become indistinguishable from commercial uses with regards to impact and character. Consider permitting or conditionally permitting more local production uses in select NC & SM zones where not currently permitted.
What policies or incentives could help strengthen local production activities centered in Ballard, Interbay, I-90/Mt. Baker & Georgetown?

- Industrial districts in Seattle are currently under pressure from light industrial uses such as auto repair that were formally accommodated in Commercial zones but are not allowed or limited in some Neighborhood Commercial zones. Consider permitting a broader range of limited light industrial uses, including auto repair and wholesaling, in NC and SM zones.

- Along designated principal pedestrian streets, one or more specific uses are required along 80 percent of the street-level street-facing facade. Where possible, allow local production uses that have few impacts and an active street presence on these streets.

- While limited commercial development is allowed in industrial zones in Seattle in order to serve industrial workers, many of these uses actually serve nearby residential neighborhoods and adversely impact parking and traffic levels in the industrial area. Consider limits on expansion of such uses as already exist and evaluate mechanisms to better target non-industrial uses serving the industrial district.

- Research and Development uses currently allowed in Seattle’s industrial zones may be exploited for conventional office development. Consider a more narrow definition of allowable Research and Development that is less vulnerable to interpretation and more consistent in its interpretation.

- Develop materials that powerfully articulate the value that industrial businesses bring to neighborhoods like Ballard, Interbay, Mt. Baker, and Georgetown – and to the City as a whole.

- Evaluate the feasibility of incentive zoning that provides density bonuses for mixed-used projects in industrial zones that elect to include an industrial component.
Other policies, programs or incentives can help strengthen local production activities centered in Seattle, in partnership with other City departments and/or outside organizations. These include:

- Manufacturing-aware cities often provide incubation spaces – production space as well as investment capital. Entrepreneurial and maker communities often produce small ideas that graduate to large companies (Under Armour in Baltimore’s Tide Point area is one example.)
- Work on industrial business retention and expansion. Industrial firms have specific land-use needs and challenges (New York Industrial Retention Network is an example.)
- Assistance with branding, and marketing assistance and outreach (walking tours have been effectively used in Philadelphia’s Navy Yard to tell the story of a community’s industrial history.)
- Connect educators with industrial businesses to ensure training programs produce the workers businesses want.
- Prioritize arterial and local street repair within industrial areas.
- Clearly define parking within Seattle’s industrial areas.
- Consider subsidized municipal parking lots or structures for urban industrial districts.
- Increase police patrols and repair street lighting to improve security in industrial areas.
- Provide assistance for small businesses that are growing in place in Seattle’s industrial areas.
- Provide or facilitate loans and financing for capital equipment purchases and expansion.
- Improve assistance for environmental regulation compliance in industrial areas.
- Create an Industrial SpaceFinder for the City of Seattle.
- Provide maps, fact sheets and other resources for industrial users in Seattle.
Seattle’s Industrial Zoning Categories

**General Industrial 1 (IG1)**

The intent 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 those uses to a density or size limit lower than that allowed for industrial uses.

**Typical Land Uses**

- General and heavy manufacturing, commercial uses, subject to some limits. High impact uses as a condition of use. Institutional uses in existing buildings, entertainment uses other than retail, transportation and utility services, and salvage and recycling uses.

**Height**

- No maximum height limit except retail, office, entertainment, research and development, and institutional uses which are limited to 20’, 45’, 85’, or 95’ as designated on the Official Land Use Map.

**Maximum size of use**

- Retail sales and service and entertainment uses: 10,000 square feet.
- Office uses: 10,000 square feet.
- Some exceptions apply to maximum size of use limits (23.02.039.99).

**Industrial Buffer (IB)**

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

**Typical Land Uses**

- Light and general manufacturing, commercial uses subject to some limits, some transportation services, entertainment uses other than retail, institutions generally in existing buildings, salvage and recycling uses.

**Height**

- Same as IG1 and IG2, plus.

**Setbacks**

- 1.5’ from street property lines when across from SF or LR zones (low density).
- 5’ for parking lots or structures or driveways when any lot lines abut a residential zone.
- 10’ for outdoor storage, recycling or storage facilities when any lot lies abut a residential zone.
- 50’ from any lot in a residential zone for outdoor manufacturing, recycling or refuse compacting.
- 10’ for all windows or openings that face an abutting residentially zoned lot, unless the opening is an intransient or perishable to be lost or screened.

**Screening and Landscaping**

- Street trees and screening required for roadway areas, parking, loading, outdoor sales and storage, and driveways for business when lot abuts or is adjacent to right-of-way from residential or neighborhood commercial areas.

**Access to Parking and Loading**

- No limits to parking and loading locations except those provided under setbacks. Parking and loading access is prohibited across streets or alleys from residentially zoned lots, except in limited circumstances.

**Major Color Sources**

- Uses which involve designated odor-emitting processes may be called a major odor source. A major odor source may be required to take measures to reduce odor emissions and airborne pollutants.

**Light and Glare**

- Exterior lighting must be shielded away from residential zones. Facade materials which emit light in glass may be required to be shielded.

**General Industrial 2 (IG2)**

The intent of the IG2 zone 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.

**Typical Land Uses**

- Same as IG1

**Height**

- Same as IG1

**Maximum size of use limits**

- Lodging and entertainment uses: 10,000 square feet.
- Office and retail uses: 25,000 square feet.
- Some exceptions apply to maximum size of use limits (23.02.039.99).

**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.**

**Typical Land Uses**

- Light and general manufacturing, commercial uses, transportation facilities, entertainment other than retail, institutions generally in existing buildings, utilities, and salvage and recycling uses.

**Height**

- The maximum structure height for all uses is 30’, 45’, 60’, or 80’ as designated on the Official Land Use Map. Along the central waterfront special limitation applies.

**Maximum size of use**

- Retail sales and service and entertainment uses: 75,000 square feet.
- Office uses no maximum size limit. The total area of the forgoing uses on a lot may not exceed two and one half times the area of the lot, or three times the size of the lot in the South Lake Union area. Some exceptions apply to maximum size of use limits (23.02.039.99).

**FAR**

- 2.5, except in South Lake Union where FAR is dependent on the height limit (Table A for 23.02.039.99).

**Setbacks**

- Same as IG1 and IG2, plus.
- When abutting a residentially zoned lot, setback varies with the height of the structure and when steel frames are required. No openings permitted within 5’ of residentially zoned lot.

**Screening and Landscaping**

- Street trees, screening and landscaping required for blank facades, parking and loading, outdoor sales, rental and storage, drive-in businesses.

**Major Color Sources**

- Uses which involve designated odor-emitting processes may be called a major odor source. A major odor source may be required to take measures to reduce odor emissions and airborne pollutants.

**Light and Glare**

- Exterior lighting must be shielded away from residential zones. Facade materials which emit light in glass may be required to be shielded.
### AGRICULTURAL USES
- A.2 Aquaculture
- A.3 Community Garden
- A.5 Urban Farm

### 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.f.i Lecture and meeting halls
    - C.3.f.ii Motion picture theaters
    - C.3.f.iii Performing arts theaters
    - C.3.f.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

### 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

### MANUFACTURING USES
- G.1 Manufacturing, light
- G.2 Manufacturing, general
- G.3 Manufacturing, heavy

### PARKS AND OPEN SPACE

### PUBLIC FACILITIES
- I.3 Other public facilities

### 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
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