

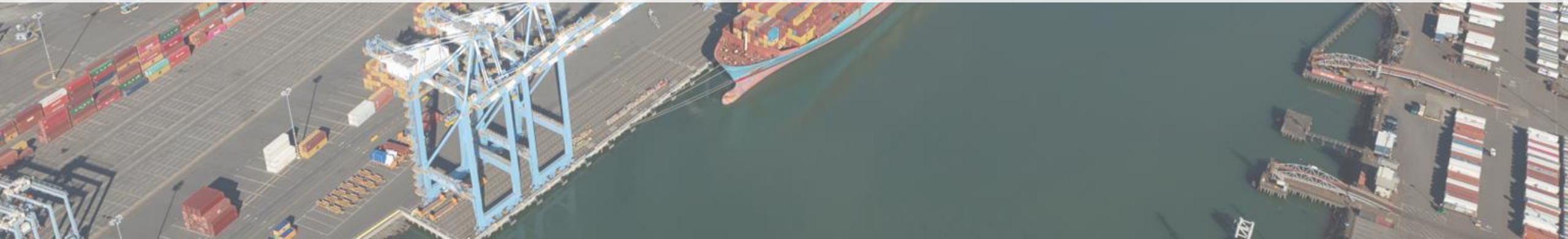


Puget Sound Regional Council



Data Preview and Progress Report

Freight Advisory Committee | December 14, 2022



Agenda



- 1. Project timeline and status**
- 2. Data analysis review**
- 3. Initial data findings**
- 4. Next steps**



Project Timeline



Winter-Summer 2022

Scoping

- Feedback from boards
- Local jurisdiction survey
- Direct engagement with local jurisdictions and agencies

Data collection

- Land Inventory
- Employment estimates and forecast to 2050
- Manufacturing/Industrial Centers

Outreach

- Peer Networking
- Industry groups
- Community organizations
- Other regions
- Tribes

Fall-Winter 2022

Data analysis

- Develop comprehensive analyses for land inventory, employment, demographic, and other data
- Manufacturing/Industrial Center profiles
- Maps/charts/graphics

Report development

- Draft findings
- Blog posts & outreach
- Board/committee engagement

Winter-Spring 2023

Project Completion

- Final report
- Web resources
- Findings and next steps for PSRC, partners, and stakeholders

Data Analysis



- **Land Inventory**
- **Employment (2005 – 2021)**
- **Worker Demographics (2010-2020)**
- **Environmental Impacts**
- **Impacts to Tribes**
- **Transportation/Freight conditions**





- **Gross and net acreage of lands available for industrial uses**
- **Includes both vacant land and land available for infill and redevelopment**
- **Analysis of region, counties, and Manufacturing/Industrial Centers (MIC)**
- **Analysis by industrial land typology:**
 - Core Industrial
 - Industrial-Commercial
 - Mixed-Use
 - Military
 - Airport Operations



Land Inventory Typologies



Core Industrial



Commercial-Industrial



Mixed Use



Airport Operations



Military Lands



Data Analysis - Employment

What are the trends for employment in industrial jobs?



- Covered employment data across industrial job categories
- Change since 2005 – 2021
- Analysis of market conditions, where available
- Analysis of region, counties, and Manufacturing/Industrial Centers
- Analysis by industrial land typology and on non-industrial lands



Data Analysis - Employment

What are the trends for employment in industrial jobs?



Job growth is slightly slower compared to non-industrial sectors

- Total industrial jobs in 2020 was 600k
- The region added 50,000 industrial-sector jobs from 2015-2020, a 9.7% growth rate. However, non-industrial jobs grew 14.4% in the same timeframe
- Industrial sectors lost 131k jobs from 2020-21, a decline of 6.1%, largely due to impacts from COVID-19

Job growth varies across sectors

- Industrial groupings with the most total growth include Builders & Contractors and Transportation, Distribution & Logistics (TDL)
- Some industries lost employees, including Telecom, Broadcasting & Video Production and Machinery & Transportation Equipment

Macro grouping	Industrial grouping	2015-2020 growth	2015-2020 growth %
Construction	Builders & Contractors	25,628	29%
	Heavy & Civil Construction	1,958	16%
Manufacturing	Electronics & Components	-1,602	-10%
	Food & Bev Processing	2,740	15%
	Machinery & Transportation Equipment	-5,821	-5%
	Metals & Fabrication	625	5%
	Other Manufacturing	-254	-2%
	Printing & Publishing	-621	-8%
	Refining, Chemicals & Plastics	357	5%
	Textiles, Apparel & Leather	-276	-10%
	Wood & Paper Products	-208	-4%
Transportation, Distribution & Logistics (TDL)	Transportation, Distribution & Logistics (TDL)	10,675	15%
Warehousing & Wholesale	Warehousing & Storage	5,229	71%
	Wholesaling	3,462	4%
Other Industrial	Building & Grounds Services	7,878	25%
	Industrial Services	1,141	19%
	Telecom, Broadcasting & Video Production	-2,700	-13%
	Utilities	1,014	18%
	Waste Management & Remediation	2,921	48%
	Other Industrial	1,298	15%
Total industrial job growth		53,442	9.7%
Total non-industrial job growth		192,388	14.4%

Data Analysis - Employment

What are the trends for employment in industrial jobs?

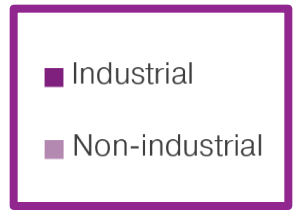
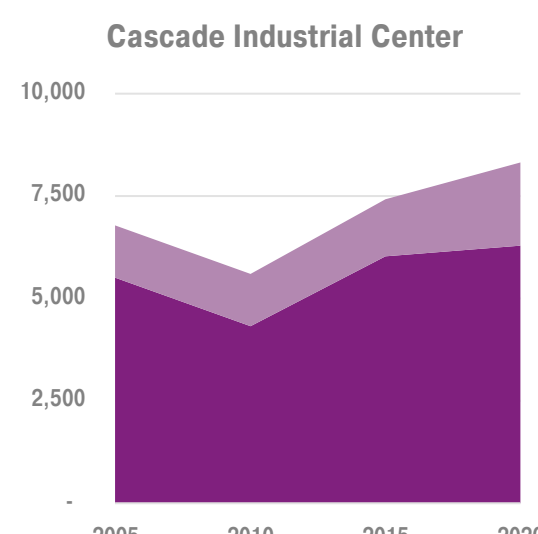
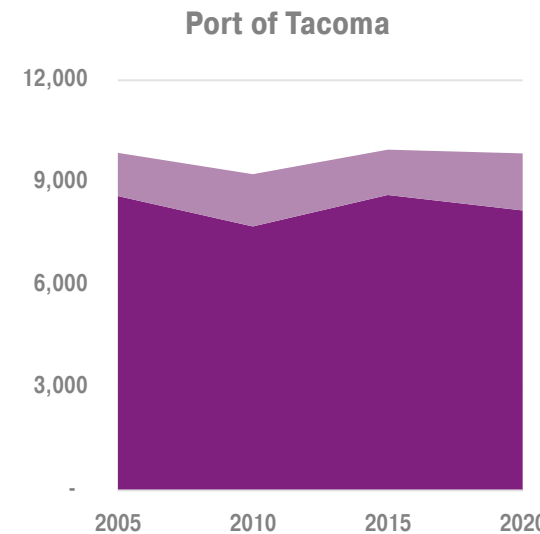
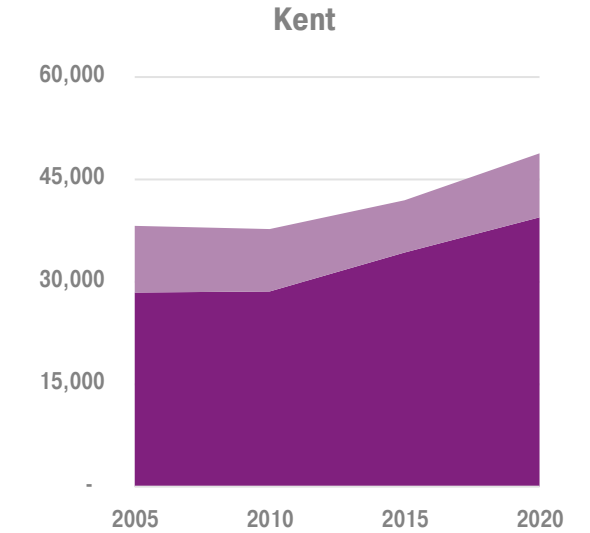
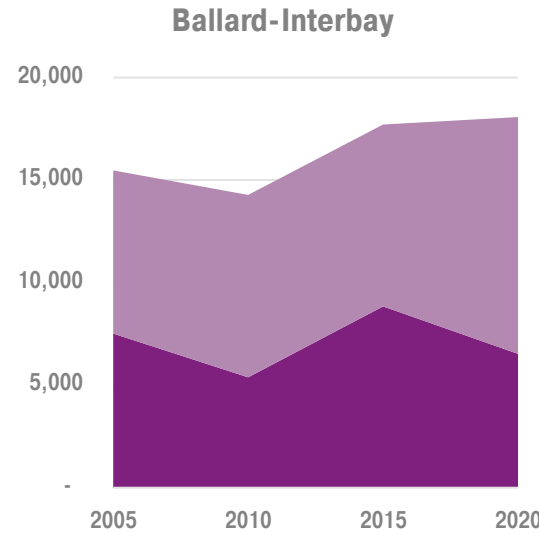
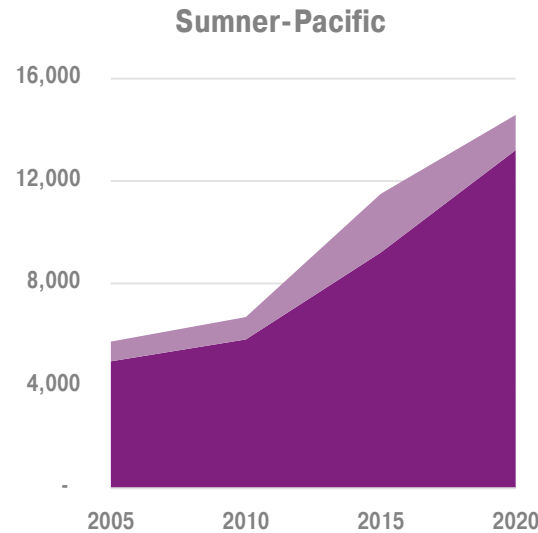


Conditions for employment growth vary considerably across counties and MICs

- Industrial growth appears to be slowing or declining in older, more established centers and increasing in outer centers

Non-industrial jobs growing significantly on industrial lands

- Lands zoned for industrial uses are seeing more non-industrial activities. Industrial jobs grew by 7.4% from 2015-2020 on these lands, while non-industrial jobs grew 19.7%



Data Analysis – Worker Demographics

What do we know about the people who work in industrial jobs?



➤ Information about who is working in industrial jobs by:

- Race/ethnicity
- Educational attainment
- Income & median income
- Change from 2010 – 2020

➤ Analysis of industrial macro groupings

➤ Analysis of region and counties



Data Analysis – Worker Demographics

What do we know about the people who work in industrial jobs?

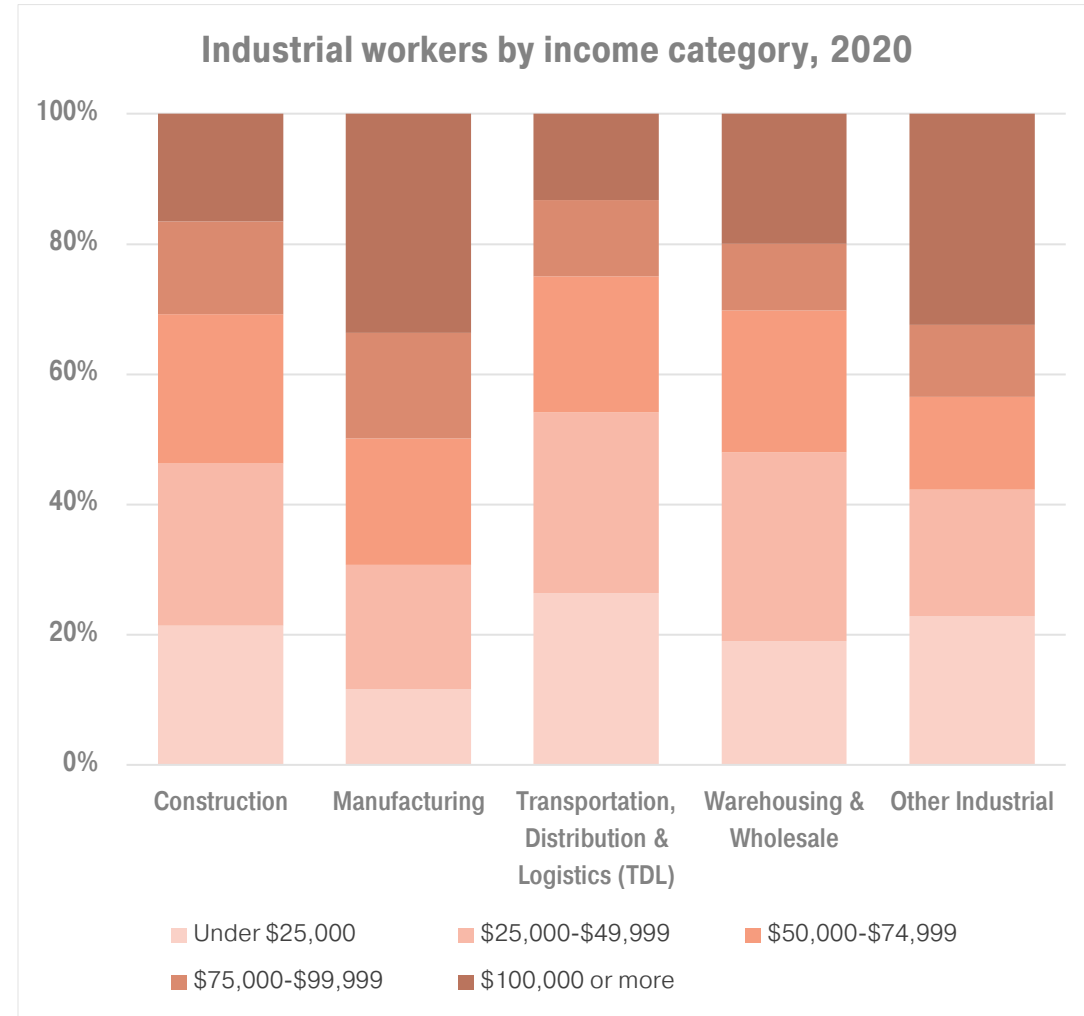


Industrial workers earn more than non-industrial workers

- The median income for industrial workers in 2020 was about \$59k. The non-industrial median income was \$42k
- 24% of industrial workers earn \$100k or more, compared to 18.5% for non-industrial workers

High variation in income among industrial groupings

- The median Income for Manufacturing was \$74k in 2020 while Warehousing & Wholesale was \$46k
- 34% of workers in Manufacturing earn \$100k or more, compared to 13% of workers in TDL



Data Analysis – Worker Demographics

What do we know about the people who work in industrial jobs?



Race/ethnicity of industrial workers roughly analogous to non-industrial workers, with some caveats

- White alone share of industrial workers is 72% vs. 69% for non-industrial workers
- Differences in share of race/ethnicity among macro groupings

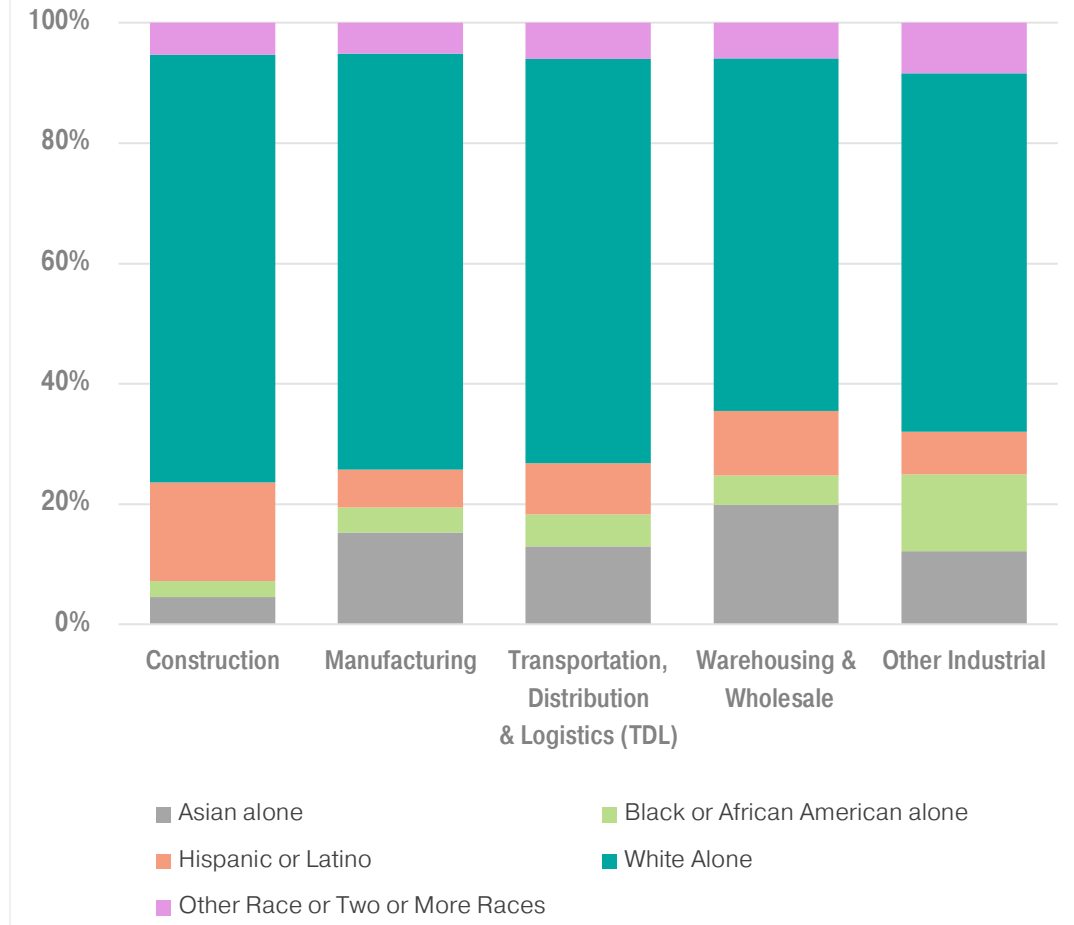
Fewer educational requirements assumed for industrial jobs

- Compared to non-industrial workers, fewer industrial workers have bachelor or postgraduate degrees.

Workers by educational attainment, 2020

	Industrial	Non-industrial
Less than HS diploma	8.5%	6.7%
HS Diploma/GED	24.7%	16.9%
Some college	33.4%	30.6%
Bachelor Degree	23.6%	27.7%
Postgraduate Degree	9.7%	18.0%

Industrial workers by race/ethnicity, 2020



How do industrial activities impact air, soil, and water quality?

Environmental Impacts

- Brownfields and soil
- Air quality
- Water quality

How are industrial activities limiting Puget Sound tribes' economic and cultural resources?

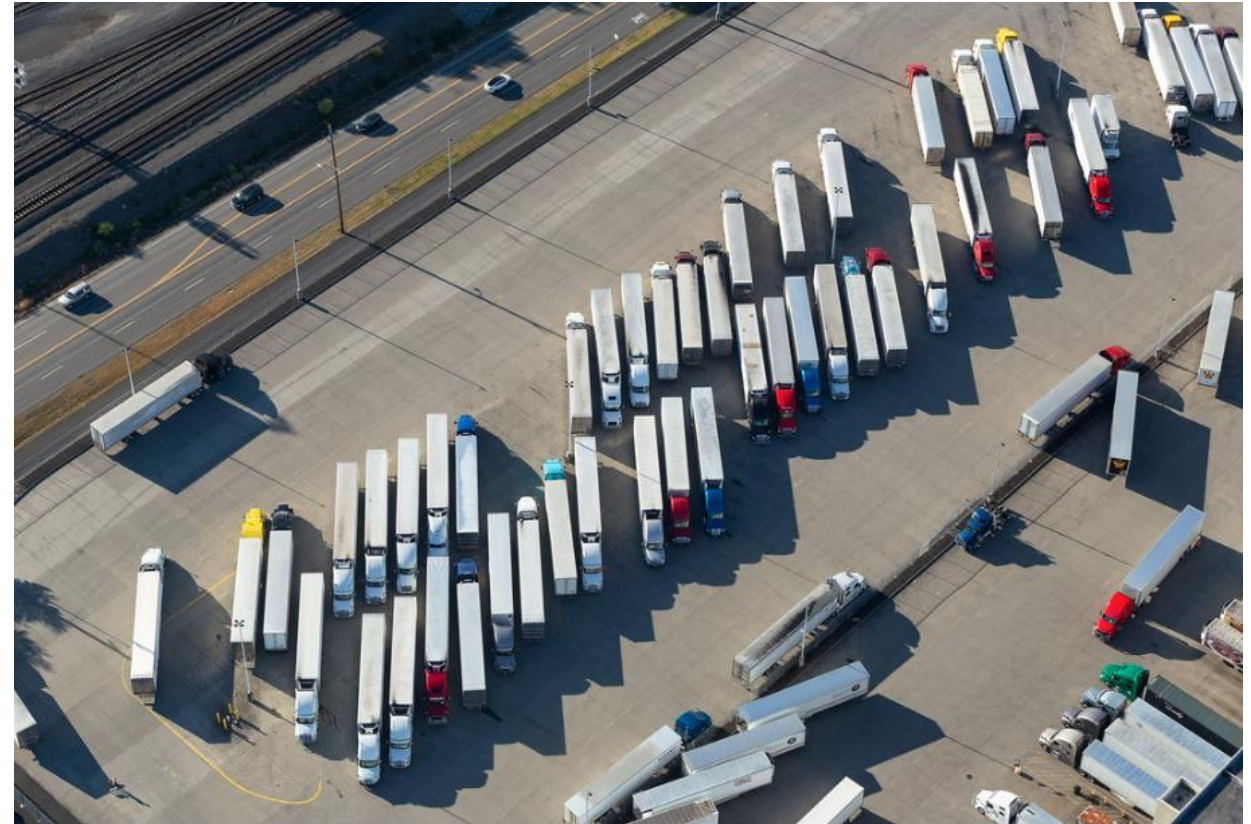
Impacts to Tribal Lands

- Industrial lands overlap with tribal lands
- Opportunities and challenges for tribes in participating in industrial economy

What are the opportunities and challenges for transportation to and from industrial lands?

Transportation Conditions

- Regional freight infrastructure
- Existing and planned transit infrastructure



Next steps



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Thank you!

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