

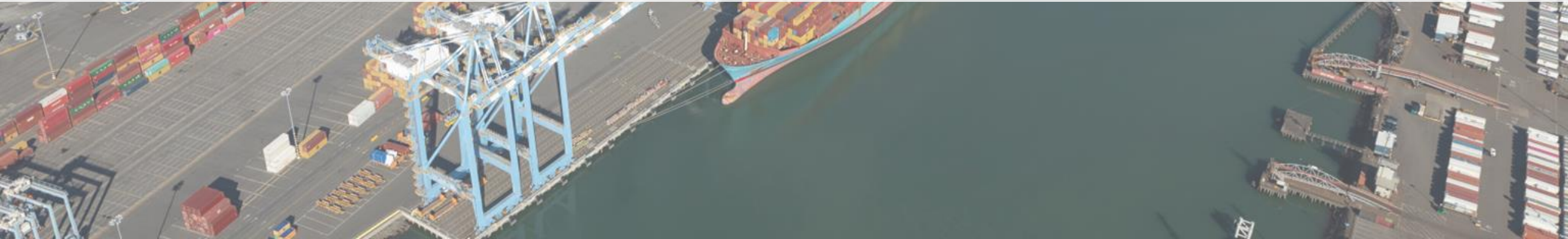


Puget Sound Regional Council



Industrial Lands Analysis

Growth Management Policy Board | May 4, 2023



Overview



- 1. Project status**
- 2. Outreach**
- 3. Data analysis**
- 4. MIC Profiles**



Purpose



- **VISION 2050 & Regional Economic Strategy**
- **Important for understanding regional economy**
- **Important issue for cities, ports, and others**

Project Timeline



2022

Scoping

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

Data collection and analysis

- Covered employment estimates and forecast to 2050
- Worker demographics
- Manufacturing/Industrial Centers

Outreach

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

Winter 22 – Spring 23

Continue data collection and analysis

- Industrial land inventory
- Employment & demographics
- Transportation and freight assets
- Climate & environment

Report development

- Outreach summary
- MIC profiles

Summer-Fall 2023

Project Completion

- Final report
- Priorities for future study



- **Local jurisdiction scoping survey**
- **Peer Networking – June 24, 2022**
- **Conversations with stakeholders and peer regions**
 - Cities, counties, ports, Tribes
- **Board/committee engagement**
 - Growth Management Policy Board
 - Economic Development District Board
 - Freight Advisory Committee
 - Regional Staff Committee

- **What are the key issues for industrial lands?**
- **What are the conditions, impacts, and opportunities to different communities?**
- **How can PSRC support local industrial lands planning work?**

What we heard – Key Points

- Communities concerned about growth of warehousing impacting availability of industrial land
- Some industrial areas seeing greater demand for uses
- Concerns over threats to port facilities and nearby industrial lands, which serve a key regional function
- Some cities identified land constraints preventing future industrial growth



What we heard – Key Points

- Light rail expansion could be a benefit to industrial hubs, but concerns over pressure to convert to other uses
- Communities identified workforce development and education strategies as ways to attract underserved populations to industrial jobs
- Local governments need more data and info on worker demographics to address racial equity goals
- Tribes face unique challenges related to industrial lands and development



Data Analysis - Land Inventory

What is the capacity for economic growth on industrial lands?



- Total land zoned for industrial
- Land available for new development
 - Vacant and redevelopable parcels
- Manufacturing/Industrial Centers (MIC) profiles
- Analysis by industrial land typology



Land Inventory Typologies



Core Industrial



Commercial-Industrial



Mixed Use



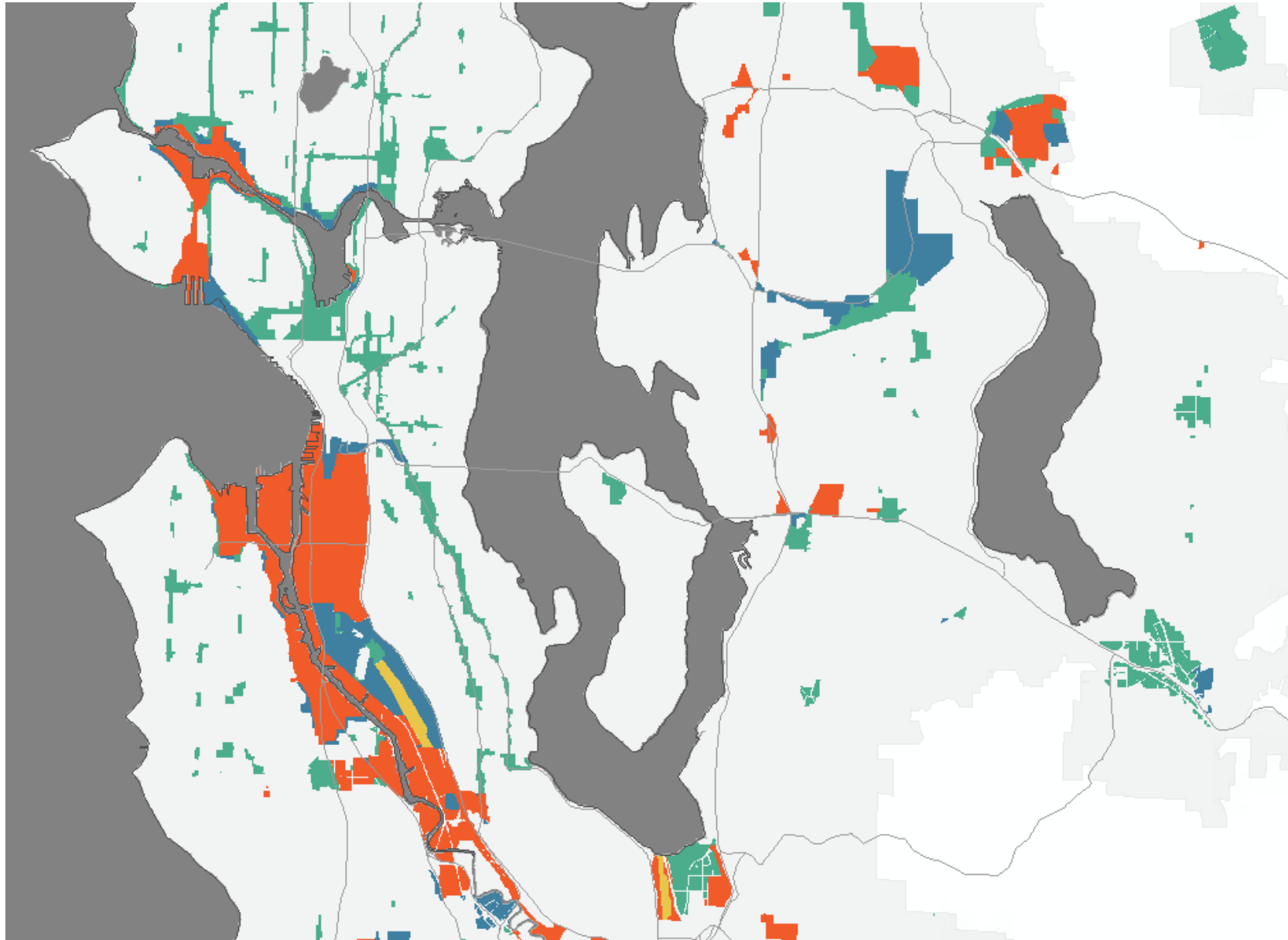
Airport Operations



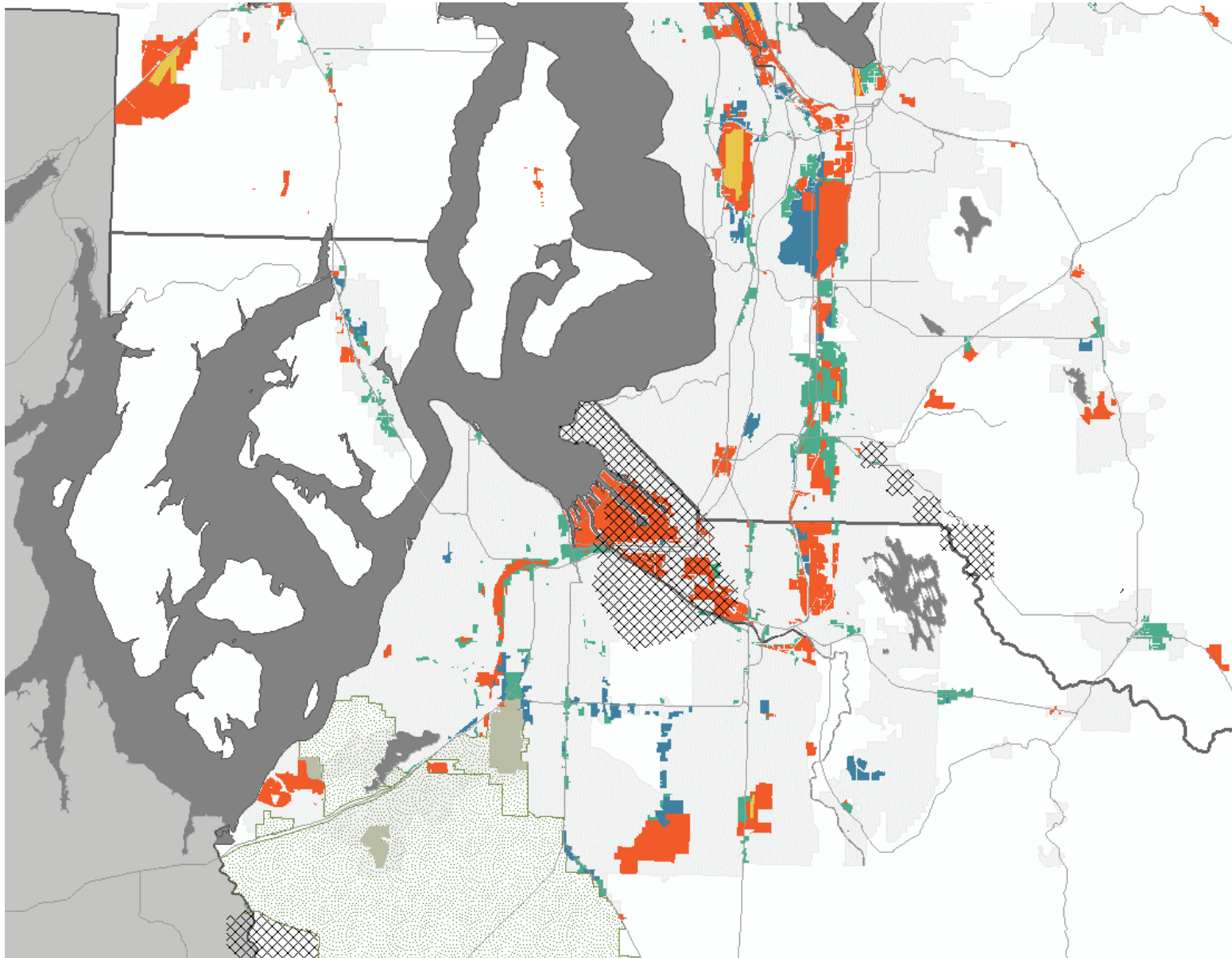
Military Lands



Land Inventory Typologies



Land Inventory Typologies



Covered employment data across industrial job categories

➤ Job growth is slightly slower compared to non-industrial sectors

- Total industrial jobs in 2020 was 600,000
- Industrial jobs grew at a slower rate to non-industrial jobs (9.7% to 14.4%)
- Industrial sectors lost jobs in 2020 due to impacts from COVID-19. PSRC is monitoring recovery.

➤ Job growth varies across sectors

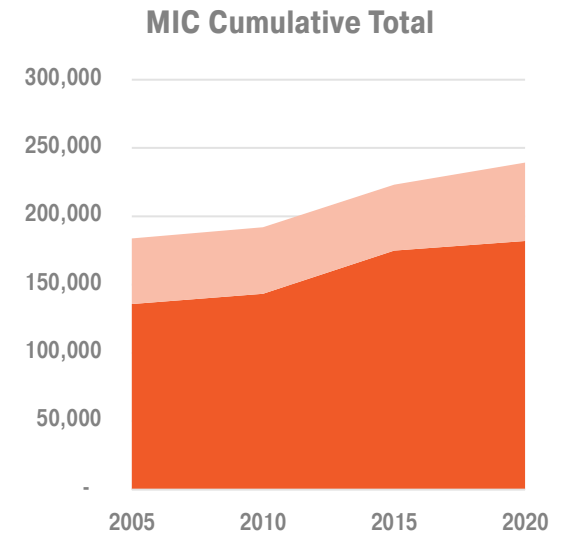
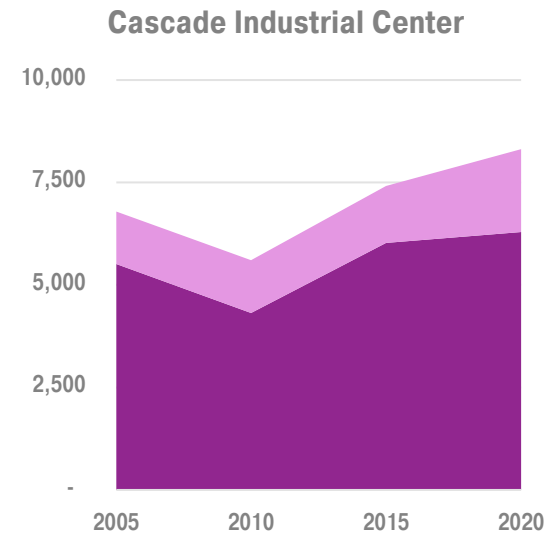
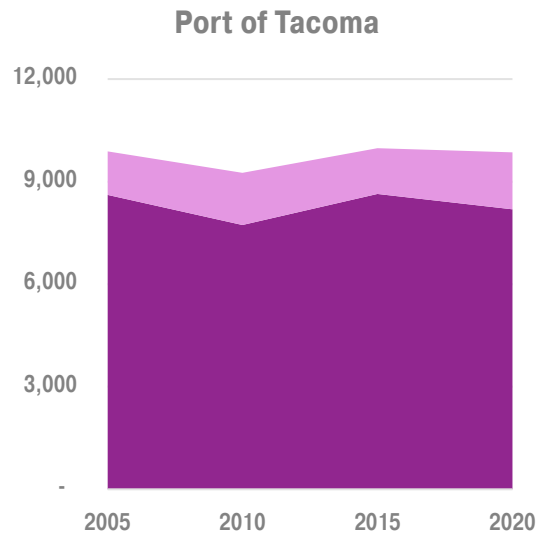
- Builders & Contractors and Transportation, Distribution & Logistics (TDL) saw biggest net growth
- Warehousing saw biggest percentage increase
- Some industries lost employees, including Telecom, Broadcasting & Video Production and Machinery & Transportation Equipment





Industrial growth appears to be slowing in established centers and increasing in outlying centers

Non-industrial jobs are growing on industrial lands



■ Industrial
■ Non-industrial

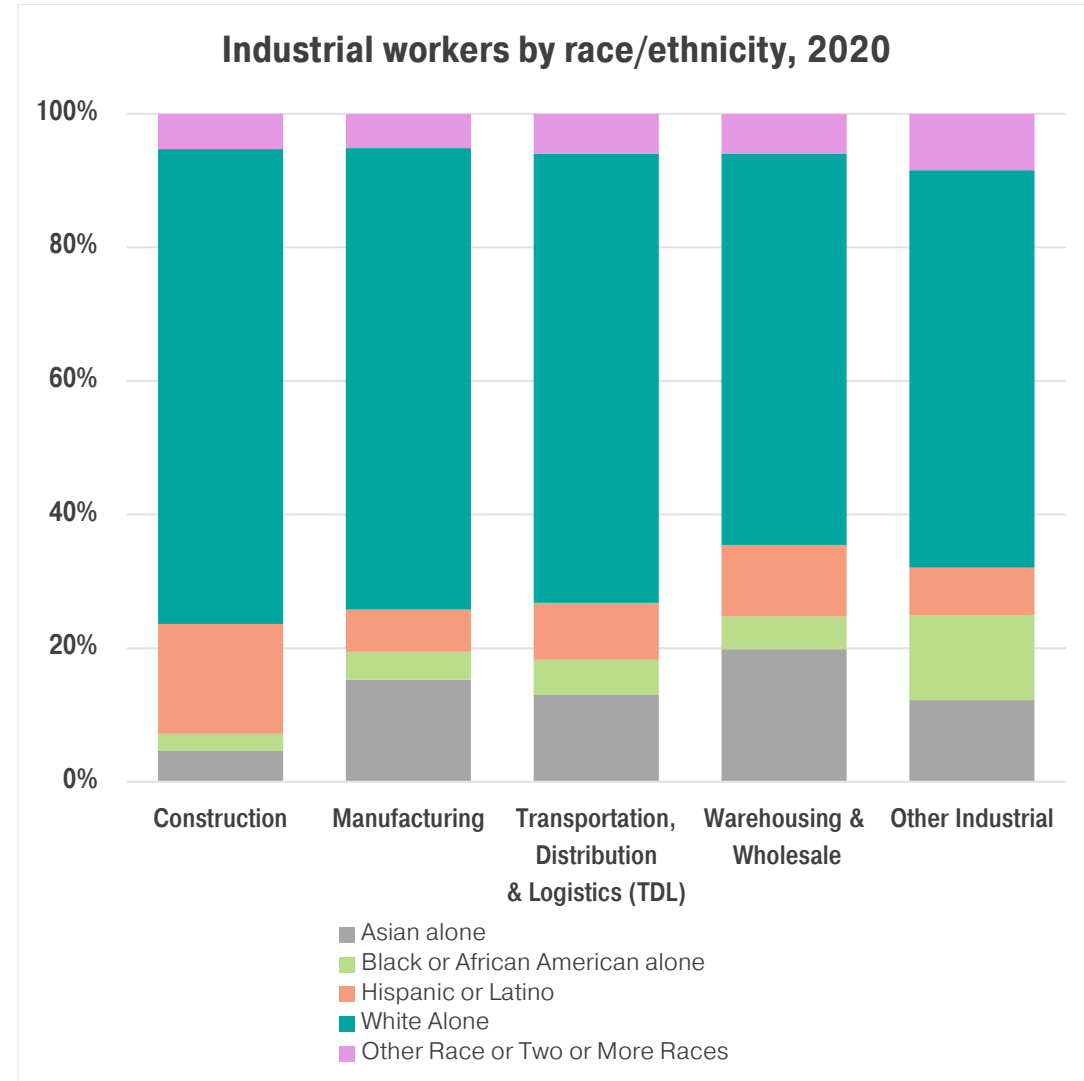
Data Analysis – Worker Demographics

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



Additional data analysis in development

Environmental Impacts

- Brownfields and soil
- Air quality
- Water quality

Impacts to Tribal Lands

- Industrial lands overlap with tribal lands
- Opportunities and challenges for tribes in participating in industrial economy
- Impacts to fisheries, Tribal resources

Transportation Conditions

- Regional freight infrastructure
- Existing and planned transit infrastructure

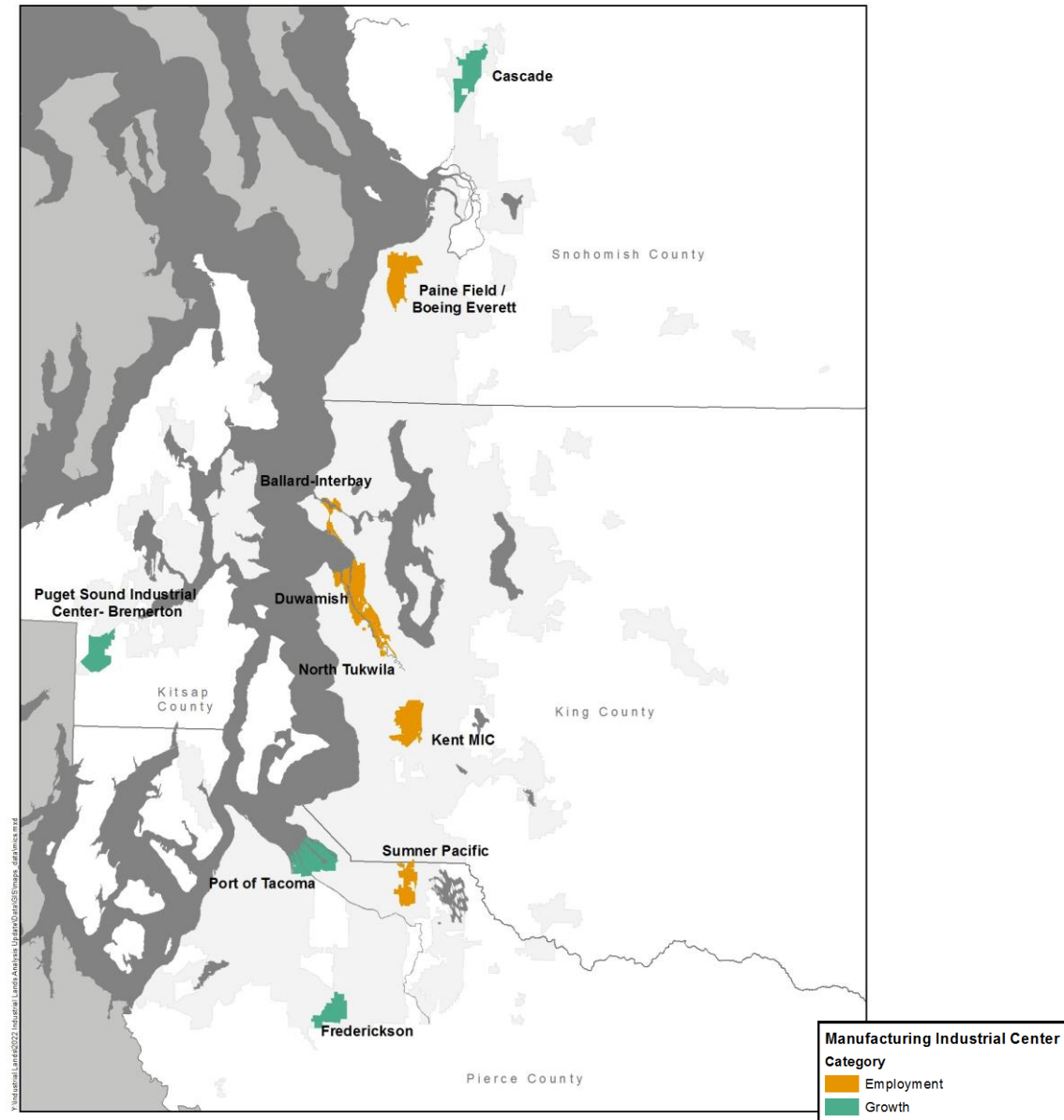


Manufacturing/Industrial Center (MIC) Profiles



➤ Profiles on the ten Manufacturing/Industrial Centers

- Will provide a snapshot of key information that will aid local subarea plans



Manufacturing/Industrial Center (MIC) Profiles



Sumner-Pacific Manufacturing/Industrial Center

Sumner & Pacific, Pierce County | MIC – Employment | Regionally Designated in 2016

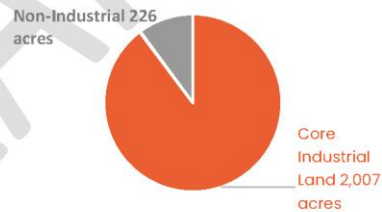
The Sumner-Pacific MIC is located in the two cities of Sumner and Pacific in Pierce County. The MIC is an important regional warehousing, transportation, distribution, and logistics hub. It has easy connections to the regional transportation system via SR 167, a principal freight corridor.

Total Acres	2,236
Total Jobs	14,566
Industrial Jobs %	90.6%
Employment Density	6.5 jobs/acre
Total Population	322
Housing Units	98



Sources: Costar, PSRC covered employment estimates, U.S.Census

Industrial Land Types + Supply



Industrial Land Types	
Yellow	Airport Operations
Orange	Core Industrial
Blue	Industrial-Commercial
Green	Military
Light Green	Mixed-Use
Dark Green	Manufacturing Industrial Center
White	Indian Reservation Land
Grey	Military Bases

Source: PSRC



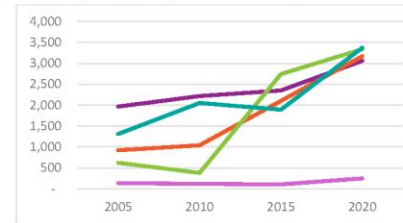
For more information on the data used in this profile, see <https://www.psrc.org/our-work/industrial-lands>.



Sumner-Pacific Manufacturing/Industrial Center

Sumner & Pacific, Pierce County | MIC – Employment | Regionally Designated in 2016

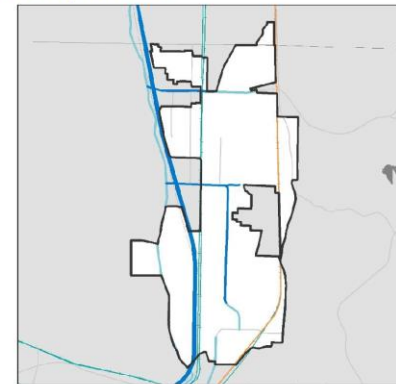
Jobs by Employment Sectors



Source: PSRC covered employment estimates

	2020 Jobs	Change 2010-2020
Construction	3,061	841
Manufacturing	3,172	2,132
Transportation, Distribution & Logistics	3,341	2,960
Warehousing & Wholesale	3,374	1,319
Other Industrial	250	131

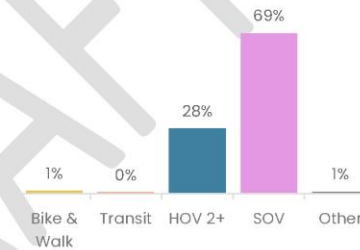
Transportation



High Capacity Transit	
Blue line	Light Rail
Orange line	Commuter Rail
Green line	Bus Rapid Transit
Red line	Streetcar
Purple line	Ferry
Black line	HCT Stops

Source: PSRC

Commute Mode of Workers in MIC



Source: PSRC SoundCast



The Freight and Goods Transportation System (FGTS) is a WSDOT system for classifying state freight corridors by modes based on annual freight tonnage.

Sources:

Costar; dataset [year]

PSRC: Covered Employment Estimates [2020], Industrial Lands Report [2023], 2050 RTP [2018], Transportation [year]

U.S. Census Bureau: 2020 Census



Project Timeline



2022

Scoping

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

Data collection and analysis

- Covered employment estimates and forecast to 2050
- Worker demographics
- Manufacturing/Industrial Centers

Outreach

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

Winter 22 – Spring 23

Continue data collection and analysis

- Industrial land inventory
- Employment & demographics
- Transportation and freight assets
- Climate & environment

Report development

- Outreach summary
- MIC profiles

Summer-Fall 2023

Project Completion

- Final report
- Priorities for future study



- **Are the data and information consistent with your experiences regarding industrial lands?**
- **How can PSRC continue to support local planning for industrial lands?**



Thank you!

Ben Kahn | bkahn@psrc.org

Paul Inghram | pinghram@psrc.org



Puget Sound Regional Council

