



## Puget Sound Regional Council

### **Freight Advisory Committee Agenda**

**Date: Wednesday, December 13, 2023, from 9:30 to 11:00 a.m.**

**Location: *Online Meeting Only – See Remote Participation Instructions Below***

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**1. Welcome and Introductions (9:30) – Geri Poor, Chair**

Roll call and introductions.

**2. Approve Meeting Summary for October 11, 2023\* (9:35)**

**3. Discussion: Industrial Lands Analysis Update (9:40)\***

PSRC staff will provide an update on the Industrial Lands Analysis, including findings from the industrial lands inventory, demand analysis, employment data, and demographic data, and next steps and updated timeline for completion of the project.

**4. Discussion: Update on Regional Safety Plan (10:20)**

PSRC staff will provide an update on work to date on the Regional Safety Action Plan, including background information, preliminary work completed to date, the draft scope of work for the plan development, and next steps.

**5. Discussion: Other Business and Announcements (10:45)**

**6. Next Meeting: 2024**

**7. Adjourn (11:00)**

\*Supporting materials attached

**Other Formats:**

- Sign language, and communication material in alternative formats, can be arranged given sufficient notice by calling 206-464-7090, TTY Relay 711  
• العربية | Arabic, 中文 | Chinese, Deutsch | German, Français | French, 한국어 | Korean, Русский | Russian, Español | Spanish, Tagalog, Tiếng Việt | Vietnamese, visit: <https://www.psrc.org/contact-center/language-assistance>.

## **Zoom Remote Participation Instructions:**

### **To join audio/video conference:**

<https://psrc-org.zoom.us/j/87696905823?pwd=bHFiZVAwT2ltYk5Jb29xcGhDb25QQT09>

### **To join via cellphone (1-touch dial):**

8335480282,,87696905823#,,,,\*043570# US Toll-free

8778535257,,87696905823#,,,,\*043570# US Toll-free

### **To join via phone:**

833 548 0282 US Toll-free

877 853 5257 US Toll-free

Meeting ID: 876 9690 5823

Passcode: 043570

### **Please adhere to a few virtual meeting rules:**

- Please keep your mic muted when not speaking
- Use \*6 to mute/unmute phone
- When watching the meeting via computer and using phone audio, mute your computer's speakers and mic.



## Puget Sound Regional Council

### **Freight Advisory Committee Meeting Summary**

**Date:** October 11, 2023, 9:30a.m. – 11:00a.m.

**Location:** Remote – Online Meeting Only (Zoom Meeting)

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#### **Welcome and Introductions**

Chris Eaves, Seattle, welcomed everyone at 9:30 a.m. Roll call was completed to confirm the members and alternates present.

#### **Action: Approval of Meeting Summary**

The August 9, 2023, meeting summary was approved as presented.

#### **Discussion: Regional Centers Monitoring and Redesignation**

Liz Underwood-Bultmann and Maggie Moore, PSRC, updated the FAC on the regional centers work program, including new data profiles and early planning for redesignation and monitoring called for by the Regional Centers Framework.

*For more information, contact Maggie Moore at [mmoore@psrc.org](mailto:mmoore@psrc.org) or Liz Underwood-Bultmann at [lunderwood-bultmann@psrc.org](mailto:lunderwood-bultmann@psrc.org)*

The presentation can be found on our website [here](#).

#### **Discussion: PSRC Freight Inventory and Data Collection**

Mitch Koch, PSRC, shared a summary of the freight inventory data collected to inform the 2022 Regional Transportation Plan (RTP) and discussed whether there are other data sources PSRC should consider for the 2026 RTP with the committee. Chris Eaves, Seattle, inquired about whether private railroads are included in our asset list. PSRC expects they are not since they are not public but will verify this.

*For more information, contact Mitch Koch at [mkoch@psrc.org](mailto:mkoch@psrc.org).*

The presentation can be found on our website [here](#).

### **Discussion: Other Business and Announcements**

Chris Eaves, Seattle, informed the committee that the City of Seattle has its Transportation Plan out for public comment until October 26, 2023. Wenjuan Zhao, WSDOT, informed the committee that the 2023 FGTS update will be released in December 2023.

### **Adjourn**

The meeting adjourned at approximately 11:00 a.m.

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**\*Members and Alternates Present**

See attached attendance roster for the member or alternate representing each agency/jurisdiction at the meeting; additional alternate(s) present are listed below.

**\*Alternates, Interested Parties, and PSRC Staff Present**

Jeff DeVere, Washington Trucking Association; Adam Leslie, City of Tacoma; Aaron Garland; Scott McCollister, WSDOT; Wenjuan Zhao, WSDOT

PSRC

Jennifer Barnes, Alexa Leach, Mitch Koch, Maggie Moore, Liz Underwood-Bultmann

*\*All attendees were present via remote participation*

# Freight Advisory Committee Attendance Roster

Date: October 11, 2023 9:30am - 11:00am

Remote/Online Only

**NOTE: Members are invited to sit at the table and vote. Alternates may sit at the table and vote when the member is absent. Please coordinate representation in advance of the meeting.**

Jurisdictions		Name	Jurisdiction		Name
<b>Counties</b>			<b>Industrial Sub Areas</b>		
King County (1)		John Vander Sluis	Arlington - Marysville (1)	<input checked="" type="checkbox"/>	Jim Kelly, Arlington
		<i>Vacant (Alt.)</i>			<i>Ryan Morrison, Arlington(Alt.)</i>
Kitsap County (1)	<input checked="" type="checkbox"/>	David Forte	Dupont - Gray Field (1)		VACANT
		<i>Melissa Mohr (Alternate)</i>			<i>Vacant (Alt.)</i>
Pierce County (1)		Clint Ritter	Frederickson - Lakewood (1)		Paul Bucich, Lakewood
		<i>Peter Lewis-Miller (Alt.)</i>			<i>Vacant (Alt.)</i>
Snohomish County (1)		Jim Young	Interbay - Ship Canal (1)	<input checked="" type="checkbox"/>	Chris Eaves, Seattle
		<i>Sheela George (Alt.)</i>			<i>Joanna Valencia, Seattle (Alt.)</i>
<b>Ports</b>			North-Central Everett (1)	<input checked="" type="checkbox"/>	Jesse Hannahs, Marysville
Port of Bremerton (1)		Arne Bakker			<i>Vacant (Alt.)</i>
		<i>James Goodman (Alt.)</i>	PSIC - Bremerton - Sinclair Inlet (1)		Vicki Grover, Bremerton
Port of Everett (1)		Adam LeMieux			<i>Shane Weber, Bremerton (Alt.)</i>
		<i>David Simpson (Alt.)</i>	SeaTac - Des Moines (1)	<input checked="" type="checkbox"/>	Florendo Cabudol, SeaTac
Port of Seattle (1)	<input checked="" type="checkbox"/>	Geri Poor, Chair			<i>Vacant (Alt.)</i>
		<i>Kyra Lise (Alt.)</i>	Auburn - Sumner (2)	<input checked="" type="checkbox"/>	Jacob Sweeting, Auburn
Port of Tacoma (1)		Christine Wolf		<input checked="" type="checkbox"/>	Michael Kosa, Sumner
		<i>Alisha Pena (Alt.)</i>			<i>Ryan Windish, Sumner (Alt.)</i>
<b>WSDOT (1)</b>					<i>Vacant (Alt.)</i>
	<input checked="" type="checkbox"/>	Jason Beloso	Duwamish - North Tukwila (2)		VACANT
		<i>Wenjuan Zhao (Alt.)</i>			VACANT
<b>Freight Mobility Strategic Investment Board (FMSIB) (1)</b>					<i>Vacant (Alt.)</i>
		VACANT			<i>Vacant (Alt.)</i>
		<i>Vacant (Alt.)</i>	I-405 Corridor (2)		VACANT
<b>Tribal Agencies</b>					VACANT
Muckleshoot Indian Tribe (1)		VACANT			<i>Vacant (Alt.)</i>
		<i>Vacant (Alt.)</i>			<i>Vacant (Alt.)</i>
Puyallup Tribe (1)		VACANT	Kent - Renton (2)	<input checked="" type="checkbox"/>	David Paine, Kent
		<i>Vacant (Alt.)</i>			VACANT
Suquamish Tribe (1)		VACANT			<i>Rob Brown, Kent (Alt.)</i>
		<i>Vacant (Alt.)</i>			<i>Vacant (Alt.)</i>
Tulalip Tribe (1)		VACANT	South Everett (2)		VACANT
		<i>Vacant (Alt.)</i>			VACANT
					<i>Tom Hood, Everett (Alt.)</i>
					<i>Vacant (Alt.)</i>
			Tacoma - Puyallup (2)		Dana Brown, Tacoma
				<input checked="" type="checkbox"/>	Hans Hunger, Puyallup
				<input checked="" type="checkbox"/>	<i>Greg Vigoren, Fife (Alt.)</i>
					<i>Jeremy Metzler, Edgewood (Alt.)</i>
			<b>Non-Voting (5)</b>		
					Denise Plumb, United Parcel Service (UPS)
					Eric Jessup, WSU, Freight Policy Transportation Institute
					Jared Faker, Intl. Longshore and Warehouse Union #23
					VACANT
					VACANT

rev 7/2023

## DISCUSSION ITEM

December 6, 2023

**To:** Freight Advisory Committee  
**From:** Jason Thibedeau, Economic Development Program Manager  
**Subject:** **Industrial Lands Analysis Update**

### IN BRIEF

PSRC is continuing to develop the regional [Industrial Lands Analysis](#) update and will provide the Freight Advisory Committee with a project update including findings from the industrial lands inventory, demand analysis, employment data, and demographic data, as well as the next steps and updated timeline for completion of the project.

### DISCUSSION

In 2015, PSRC developed an Industrial Lands Analysis that assessed economic activity on industrial lands in the region and analyzed the region's ability to accommodate economic growth on industrial lands. VISION 2050 and the 2022 Regional Economic Strategy (RES) both include calls to update the Regional Industrial Lands Analysis to update the inventory of industrial lands, evaluate supply and demand for industrial land across all industry sectors, and research trends for industrial uses as technology and markets evolve.

#### Stakeholder Outreach

In 2022, PSRC staff performed stakeholder outreach to help identify trends in regional industrial lands and gather insights into the development of the Industrial Lands Analysis update. The outreach consisted of an industrial trends survey, a series of discussions with local jurisdictions with industrial lands, and discussions with PSRC boards and committees.

PSRC administered a survey of local jurisdictions and other governments with industrial land assets in February 2022 to gather their perspectives on trends that are impacting industrial lands. The survey asked about trends and issues related to industrial lands, improving equitable access to employment, relevant data and information, needed priorities for industrial lands, and recent related work. Thirteen respondents participated in the survey, each identifying priorities for their jurisdiction or organization.

In early 2022, PSRC interviewed staff from regional cities, counties, ports, and tribal governments, as well as peer regional governments in California and British Columbia to better understand recent trends impacting industrial lands. Staff also led a discussion with the Transportation Choices Coalition's Community Partners group to gather input on the topic.

In June 2022, PSRC held a virtual event focused on the Industrial Lands Analysis Update. Guest speakers from Everett, Seattle, and Tacoma presented their local industrial lands planning projects. The event provided an opportunity to highlight local work on planning for industrial lands and to solicit feedback from attendees, which included local jurisdiction planners, private sector planners, and others involved in planning for industrial lands. More than sixty people attended the event, with many tuning in from outside the region and state.

Throughout 2022, staff provided updates on the Industrial Lands Analysis Update to PSRC's Growth Management Policy Board, Economic Development District Board, Freight Advisory Committee, and the Regional Staff Committee. These board and committee discussions provided an opportunity to hear from elected officials and local staff on the industrial trends that their communities are experiencing.

During this time, feedback from stakeholder outreach was shared during board and committee presentations and fell into the following categories:

- **Supply of Industrial Lands:** Concerns regarding the availability of industrial lands to meet the current and future needs of industry.
- **Positive Drivers of Demand:** Historic industries continue to drive demand on industrial lands, as well as the emergence of newer sectors.
- **Incompatible and Undesired Uses:** Continued pressure for incompatible and less desirable uses on industrial lands.
- **Impacts to Communities:** Activities on industrial lands having impacts on regional residents, tribes, and the environment.
- **Maintenance Costs:** Challenges that jurisdictions face related to the costs of maintenance of industrial lands.
- **Workforce:** Current and projected shortages of workers for industrial activities and demographic representation in this workforce.
- **Transit Investments:** Potential benefits and challenges of new high-capacity transit investments.
- **Goods Movement:** The impact of increasing traffic on the region's industrial supply chains.

### Industrial Lands Inventory

As part of the 2015 Industrial Lands Analysis, an inventory of industrial lands was developed. This included an analysis of gross industrial lands, which refers to all industrial land, including active sites, vacant land, and physically redevelopable land. It also included net industrial land supply, which refers to a subset of the gross supply that may be available for growth, including vacant land, and physically redevelopable land. PSRC staff are working to update this inventory for the Industrial Lands Analysis update. The update defines industrial lands based almost entirely on allowed use as reflected in local zoning codes. The primary inventory intends to reflect all land within the region in which manufacturing and industrial uses are welcome to occur without conditional permits or special applications. This study relies on PSRC's 2019 Future



Land Use (FLU) dataset, a compilation of jurisdictional zoning codes and geometries. Additional detail was added for industrial zones where data provided in the FLU were not adequately granular. The resulting draft inventory was reviewed for accuracy and cross-compared with the 2015 inventory and with local zoning maps and codes to identify and correct potential errors.

The updated inventory includes the primary inventory categories that were defined in the previous analysis:

- **Core industrial:** Includes zoning designations on lands dominated by a broad range of manufacturing and traditional industrial uses.
- **Industrial-commercial:** Includes zoning designations on lands with a significant component of both industrial and commercial uses.
- **Airport Operations:** Includes land devoted to aviation operation areas, such as runways and taxi ways.
- **Military Industrial:** Includes areas within federal military bases with industrially related uses.

The updated inventory introduces a new supplemental category of lands where limited or conditional industrial uses are permitted:

- **Limited Industrial:** Includes commercial and mixed-use zones throughout the region where some manufacturing or industrial activities are allowed, along with other uses, although where there are often restrictions on the size or intensity of the industrial use. These spaces may be well suited for newer, lower-impact activities that are more compatible with neighboring uses.

The new inventory uses a more detailed and precise examination of local zoning. In total, the region has about 78,200 acres of land zoned for industrial activity with the supply spread across each county.

	<b>Core Industrial</b>	<b>Industrial-Commercial</b>	<b>Airport Operations</b>	<b>Military Industrial</b>	<b>Total Industrial</b>
King County	19,500	8,600	1,200	-	29,300
Kitsap County	1,900	4,100	400	3,700	10,100
Pierce County	11,300	8,100	300	2,500	22,300
Snohomish County	13,200	2,000	1,000	300	16,500
<b>Region</b>	<b>45,900</b>	<b>22,800</b>	<b>2,900</b>	<b>6,500</b>	<b>78,200</b>

Broadly, there have been few changes to the overall amount of lands zoned for industrial uses across the region. The region continues to maintain large industrial areas, such as the Duwamish Valley, Paine Field, and Port of Tacoma. However, as use changes occur and jurisdictions seek to support economic potential there are several anecdotal cases of adjusting zoning that shifts away from traditional manufacturing. For example, Redmond adopted the Marymoor Design District to allow

for living, employment, and retail in proximity to Marymoor Park and the future light rail station. Kenmore's zoning reflects a potential evolution of the concrete premix site to future uses. And, in Seattle, the city has studied how allowing limited amounts of office and residential uses in select locations near transit may support continued industrial and manufacturing activity. In some cases, the primary intent of the zone remains industrial and manufacturing. In other cases where the intent of the zone becomes more focused on newer, mixed uses, while allowing only restricted industrial activity, PSRC has reclassified the land as Limited Industrial.

Traditionally, industrial zoning has been the most permissive of zoning regulations, often allowing a wide range of uses. Over time, some jurisdictions have narrowed allowed uses to prevent incompatibilities with industrial activity and others have adjusted the allowed uses to better reflect economic opportunities. Some have increased allowance for non-industrial uses, such as retail storefronts, gas stations, restaurants, which are important components of industrial areas.

While the analysis of net supply is under development, jurisdictions have indicated that there is increased development in industrial areas, especially for warehouse and distribution facilities. Regionally, there remains a significant supply of vacant and redevelopable industrial land. The inventory will look at how this varies across the region. Areas close to urban centers appear to be more constrained, have greater competition of uses, and may have more involved permitting challenges. The lowest levels of net supply are found in the North Tukwila, Ballard-Interbay, and Kent Manufacturing Industrial Centers (MICs). More net space is available in outlying industrial areas, although some of these areas lack utility infrastructure or access to transportation corridors and key users.

#### Demand for Industrial Spaces

Analysis of regional CoStar data on market rents and vacancy rates shows that demand for space on industrial lands has continued to be strong. In addition, the market is continuing to invest in the development of industrial spaces. New industrial supply continues to come to market, with the most recent quarter seeing the delivery of the highest volume of new square footage in decades. Warehousing space accounts for most new industrial spaces coming online and these spaces are making up an increasing share of overall inventory.

#### Industrial Employment Trends

The update will include analysis of employment trends since the last report across six macro groupings of industrial-related industries. These groupings include Construction, Manufacturing, Transportation, Distribution & Logistics, Warehousing & Wholesale, and Other Industrial. Each macro grouping consists of one or more industry groups. For the 10-year period up to 2020, all macro groupings of industrial job categories showed employment growth. However, noticeable shifts occurred after March 2020. This included a loss of Machinery & Transportation Equipment jobs within the Manufacturing group, and increases in Warehousing & Storage, and Wholesaling jobs within the Warehousing & Wholesale group.

The region's 590,000 industrial jobs make up about 28% of the region's total covered employment of about 2,130,000 jobs. While industrial employment has grown and has largely recovered from pandemic job losses, it has grown at a slower pace than employment in other sectors. Since 2005, industrial employment grew by 15% while overall employment, including industrial jobs, grew by 30%.

### Industrial Worker Demographics

Future projections for industrial and manufacturing jobs remain strong. According to a recent report from the U.S. Chamber of Commerce, there could be as many as 2.1 million industrial and manufacturing jobs unfilled nationwide from 2020-2030 due to skill gaps in the workforce. Stakeholders expressed concerns about the region's ability to meet current and future workforce demands across industrial sectors. Data show that there is a larger percentage of workers at or nearing retirement age in the Manufacturing sector than the region, which may exacerbate challenges in maintaining this workforce.

Demographic analysis highlights that the region's industrial workforce has some notable differences to the region's total workforce. Approximately 24% of the region's industrial workforce is female, much lower than the 47% of total workforce in region, a difference that has been consistent in recent years. The share of industrial workers who are White Alone is comparable to the share in the overall regional workforce. However, that share is higher in the Construction and Manufacturing macro groups. Regional stakeholders identified that addressing this underrepresentation of certain demographic groups in the industrial workforce could be doubly beneficial: supplying the workforce needs of local employers as well as meeting the region's equity goals.

### Manufacturing Industrial Centers

Manufacturing Industrial Centers (MICs) are locations for more intensive commercial and industrial activity. MICs are designated based on an existing minimum employment threshold, land planned specifically for industrial and/or manufacturing uses, protection from incompatible land uses, efficient size and shape, planning for transportation facilities and services and urban design standards. Unlike regional growth centers, MICs have greater total employment as well as greater heavy industrial employment and are typically not appropriate for housing. VISION 2050 discourages other non-supportive land uses such as retail or non-related offices in MICs. The region is home to 10 designated MICs located across each of its four counties. They include Ballard-Interbay, Cascade Industrial Center, Duwamish, Frederickson, Kent, North Tukwila, Port of Tacoma, Paine Field/Boeing Everett, Puget Sound Industrial Center-Bremerton, and Sumner-Pacific. Land inventory and employment data will be provided for each of the region's MICs, in addition to that of regional and county levels.

### **Next Steps**

Throughout the fourth quarter of 2023, PSRC staff is providing project updates to the Regional Staff Committee, the Growth Management Policy Board, the Economic Development District Board, and the Freight Advisory Committee.

In addition, staff are reaching out to regional stakeholders to gather qualitative and quantitative information that will help validate and provide context to the draft industrial lands inventory and the regional industrial trends identified through outreach in 2022. A final report will be developed and released in the first half of 2024.

**Lead Staff**

For more information contact Jason Thibedeau, Economic Development Program Manager, at [jthibedeau@psrc.org](mailto:jthibedeau@psrc.org) or (206) 389-2879.