DUWAMISH M/IC
Policy and Land Use Study

draft recommendations

november 2013

CITY OF SEATTLE, DEPARTMENT OF PLANNING & DEVELOPMENT

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City Commitment part of Arena MOU: M/IC Policy and Land Use Study

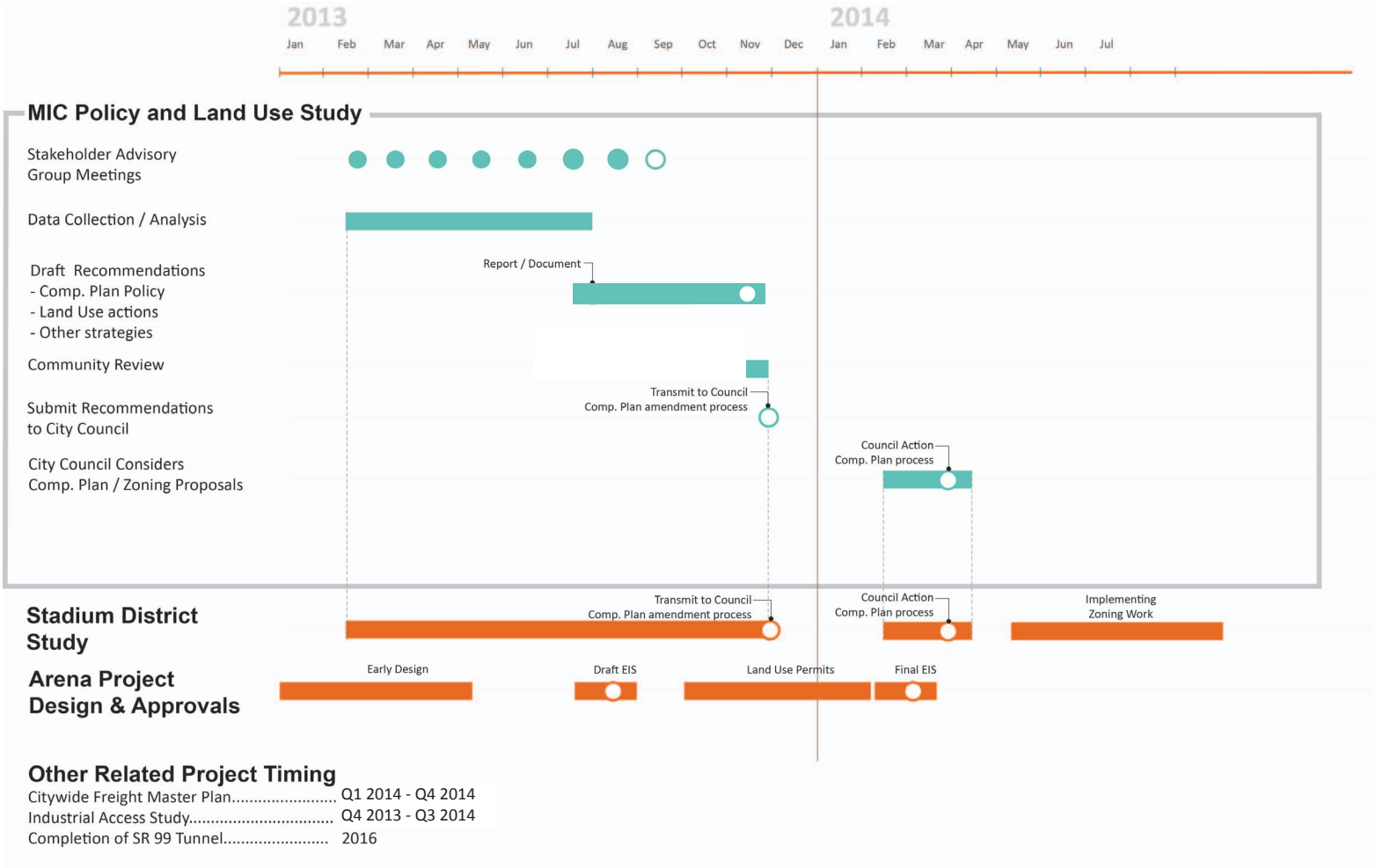
This study is based on a commitment made by the City as part of an agreement with King County and proponents of a new basketball arena. That agreement is a memorandum of understanding (MOU) that calls on the City to evaluate the necessary policies, land uses, and zoning mechanisms, such as a Port Overlay District, to protect maritime and industrial uses and reinforce the role of the Manufacturing/Industrial Center (M/IC) as an industrial sanctuary. The planning effort ("M/IC Policy and Land Use Study") builds on the City's Comprehensive Plan policies and goals for the M/IC and the Container Port Element, the M/IC Neighborhood Plan, as well as the Port of Seattle's Century Agenda.

Objectives of this Planning Effort

The objectives of this planning effort are to strengthen the long-term viability of the M/IC, protect industrial uses and Port operations, such as at Terminal 46, outside of the Stadium Transition Area Overlay District from encroachment and conversion to non-industrial uses, reinforce the M/IC as an industrial sanctuary, and coordinate with the Seattle Industrial Areas Freight Access Project that the Seattle Department of Transportation is conducting.

The 'Stadium District Study,' a separate, concurrent effort is also underway. Its goals include:

- Creating a stronger, more vibrant stadium district
- Preserving industry in the Duwamish manufacturing industrial center
- Improving pedestrian, bicycle, and transit connections to and from stadiums
- Strengthening beneficial relationships with Pioneer Square, International District / Chinatown and other neighborhoods
- Capitalizing on sustainability opportunities among stadiums



DUWAMISH M/IC POLICY AND LAND USE STUDY

REPORT SUMMARY: OBSERVATIONS & RECOMMENDATIONS

This study evaluates policies, land uses, and zoning mechanisms, such as a Port Overlay District, to protect maritime and industrial uses and reinforce the role of the Duwamish Manufacturing/Industrial Center as a manufacturing and industrial sanctuary.

Key Observations

what are some characteristics of Seattle's industrial land?

+ Seattle's industrial land is a regional economic asset at the center of a vibrant industrial eco-system

+ Seattle's industrial land is clustered in two distinct locations, the Duwamish Manufacturing/Industrial Center and the Ballard-Interbay Manufacturing Industrial Center

+ The city's land uses work together as a system; industrial land is a critical component of this system and an important source of jobs, income and services

+ Seattle's industrial land is employment rich but the density of employment is low. It supports approx 73,000 jobs, contributes 24% of B&O taxes and 32% of taxable sales

+ Transportation is the most common use on industrial land in Seattle, followed by warehousing and then by manufacturing

+ A large proportion of land designated as industrial is used for distribution, storage and repair activities and for manufacturing

+ 87% of Seattle's industrial areas are zoned Industrial General 1 (IG1) or Industrial General 2 (IG2)

+ Industrial Commercial (IC) zoning allows generous office and retail uses and has mainly resulted in large, single-use office buildings

+ The Duwamish is a dynamic place; recent changes of use are mainly along 1st Ave. S.

+ 42% of land in Duwamish is publicly owned. There are relatively few large privately-owned parcels in the Duwamish

+ Businesses supporting the Port are distributed across the Duwamish M/IC

+ Auto-dealerships are a growing presence in the Duwamish, especially along Airport Way

+ Retail uses tend to be small spaces on small lots and are found mostly on 1st and 4th Avenues

+ There is anecdotal evidence that newer, small entrepreneurial activity like workshops, small-batch food processing and design-related businesses are locating in Seattle's industrial zones

The following are DPD's preliminary recommendations for developing new land use policy and potential code amendments for the Duwamish M/IC:

Recommendations

1 Adopt specific policies in the Comprehensive Plan that will restrict removal of land from the Duwamish M/IC

Add a policy to the Urban Village Element:

Do not remove land from a designated Manufacturing/ Industrial Center unless:

- the proposed use for the land is identified
- there is insufficient appropriately zoned land elsewhere in the city for the proposed use;
- the proposed use would not displace an existing industrial use; and
- the proposed use would not adversely affect nearby industrial operations.

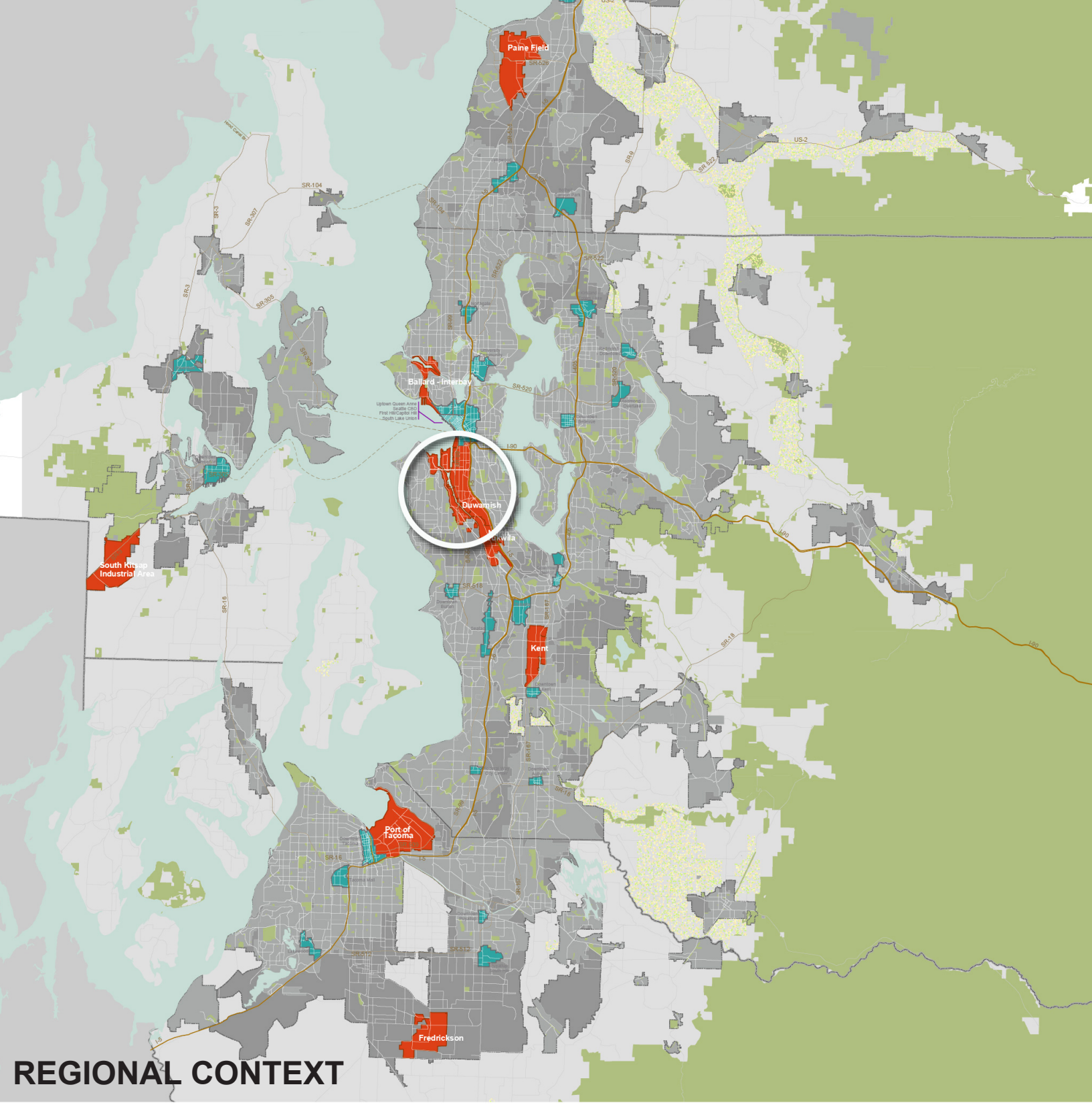
2 Consider removing the stadium overlay district from the M/IC and treating it as its own unique geographic designation

3 Rather than adopt a Port Overlay District; treat the entire Duwamish M/IC the same to accomodate port-related activity throughout

4 Do not allow any new Industrial Commercial (IC) zoning in the Duwamish M/IC

5 Increase effectiveness of regulations limiting the size of non-industrial uses in the Duwamish M/IC

6 Explore options to delineate an 'Auto Row,' possibly along Airport Way, to allow this retail sector to continue to locate in the city while limiting impacts to industrial uses



REGIONAL CONTEXT

Regional Growth Centers
Manufacturing / Industrial Centers
Parks / Open Space / Forest Resource Lands
Urban Growth Area
Cities

Miles
0 1.5 3 6 9 12

N W E S

Source of numbers: PSRC
http://www.psrc.org/about/boards/gmpb/gmpb-presentations/
and Colliers Puget Sound Region Research and Forecast Report, Q3 2012, Industrial

+ SEATTLE'S INDUSTRIAL LAND IS AT THE CENTER OF A VIBRANT REGIONAL INDUSTRIAL ECOSYSTEM AND MARKETPLACE

The Duwamish Manufacturing and Industrial Center (M/IC) is the oldest and largest single member of a regional cluster of eight designated centers spread across the Puget Sound region. These centers function as a regional industrial ecosystem and market. They complement and compete with each other.

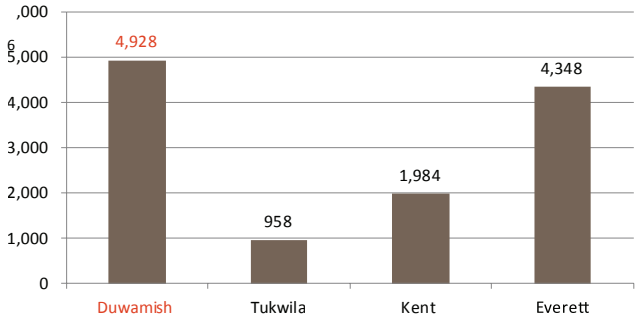
The Duwamish M/IC is the northern end of an industrial corridor that extends from downtown Seattle south to the Kent Valley. Comprised of approximately 4,928 acres of marine and industrial lands, the Duwamish M/IC is a unique regional resource and economic engine.

In recent years, the Kent Valley has been the strongest industrial market in the region with significant new development recently built and in the pipeline, primarily due to its supply of large vacant parcels suitable for expansion or acquisition for industrial use.

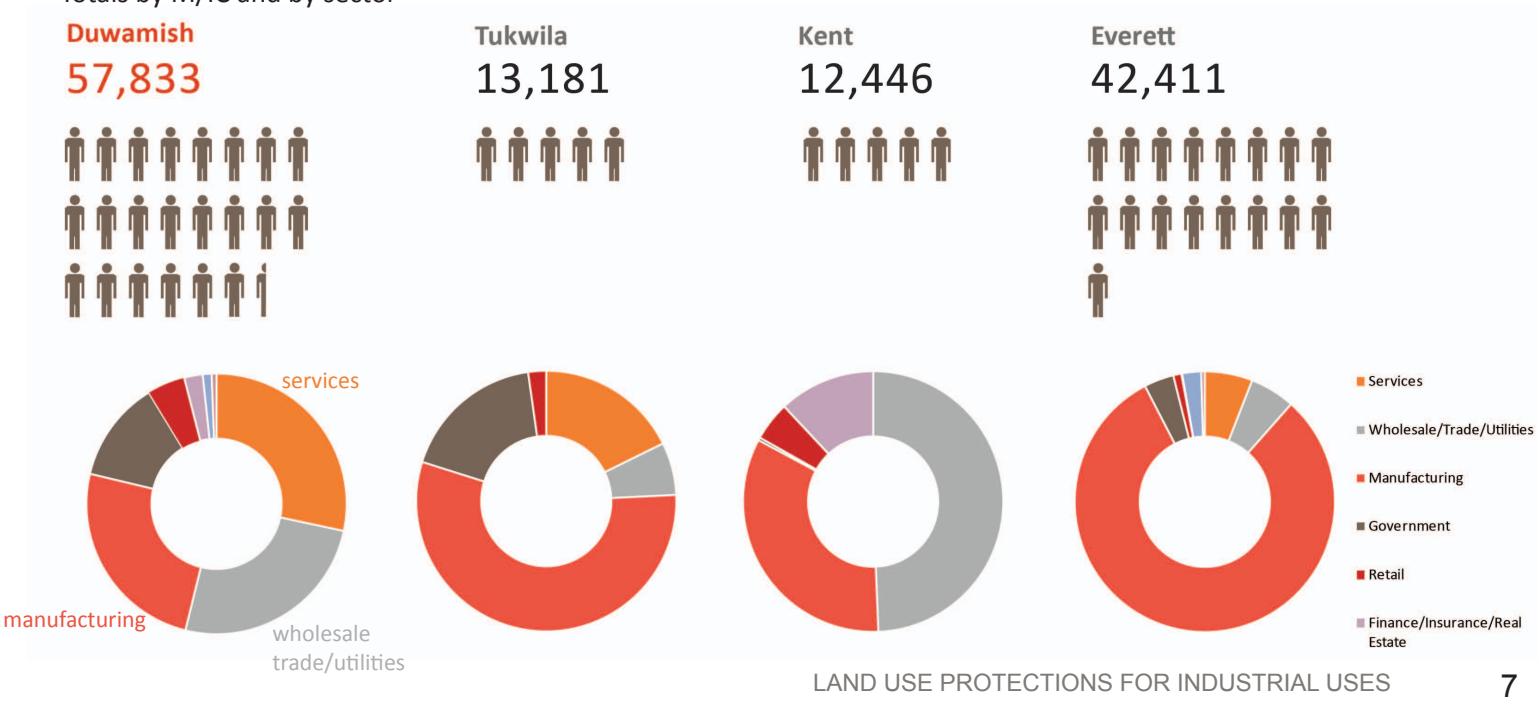
Nevertheless, the Duwamish M/IC provides the largest concentration of family wage industrial jobs in the Puget Sound region, generating enormous tax and export revenues. In 2010 this area included more than 50,000 jobs within its boundaries. The regional vacancy rate for industrial space is 6.44%, but vacancy rates of Seattle industrial space have remained below 5.00% over the past two years. The vacancy rate for the last quarter of 2012 was approximately 3.85% which is the lowest the market has seen in recent history

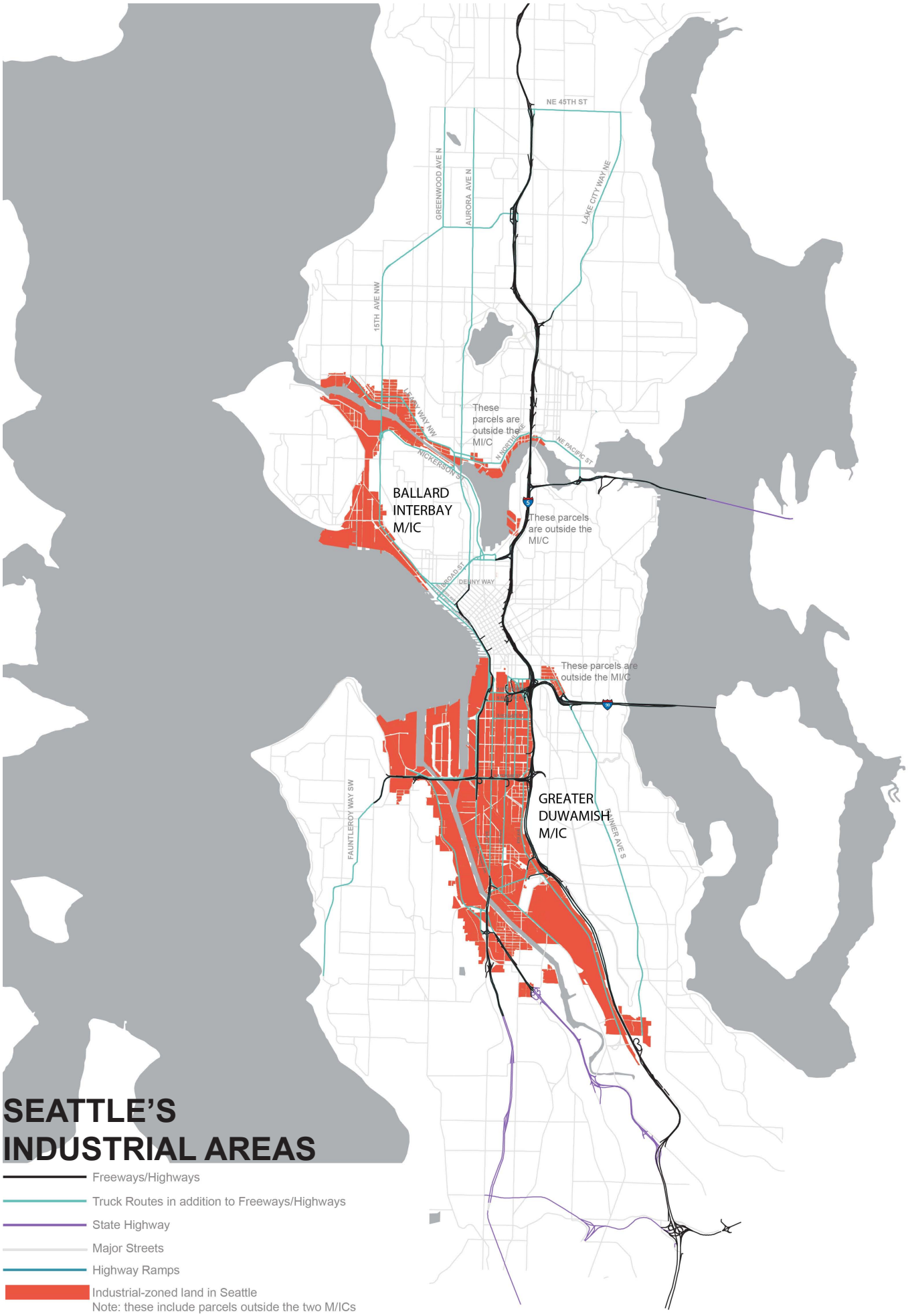
There are differences in distribution of jobs among the M/ICs in the region. Jobs in the Duwamish are split among manufacturing, warehousing/utilities and services. Manufacturing jobs dominate in Tukwila and Everett while wholesaling, transportation and utilities dominate in Kent Valley.

Land Area
(in acres)



Jobs
Totals by M/IC and by sector





SEATTLE'S INDUSTRIAL AREAS

- Freeways/Highways
- Truck Routes in addition to Freeways/Highways
- State Highway
- Major Streets
- Highway Ramps
- Industrial-zoned land in Seattle

Note: these include parcels outside the two M/ICs
see map on page 12 for detailed zoning and boundaries

+ SEATTLE'S INDUSTRIAL DISTRICTS ARE CLUSTERED IN TWO DISTINCT LOCATIONS

Today, there are approximately 6,196 acres of industrial-zoned land in the City of Seattle,representing 12% of the city's total land area. Most of this land is clustered in two locations, the Duwamish and the Ballard-Interbay Manufacturing/Industrial Centers. Both of these areas share characteristics that make them attractive locations for industrial uses. These include the presence of relatively large, flat sites, access to highways, freight rail, port facilities, proximity to similar uses, customers, labor force or supportive services and separation from residential uses.

Though the two industrial districts share some of these characteristics, there are many differences between the two in scale, character, development patterns, and surrounding uses. The Duwamish is older and larger (almost 5 times larger than Ballard-Interbay). The Port of Seattle's container terminals and businesses dependent on the Port anchor an ecosystem in the Duwamish. The Duwamish is also the location of several other large public uses. A significant proportion of land in the Duwamish, close to 42%, is publicly-owned land used for critical public infrastructure. These include facilities for the City's public utilities, police, and transit (bus and light rail) maintenance, school district headquarters, post office facilities Port operations and the King County Airport.

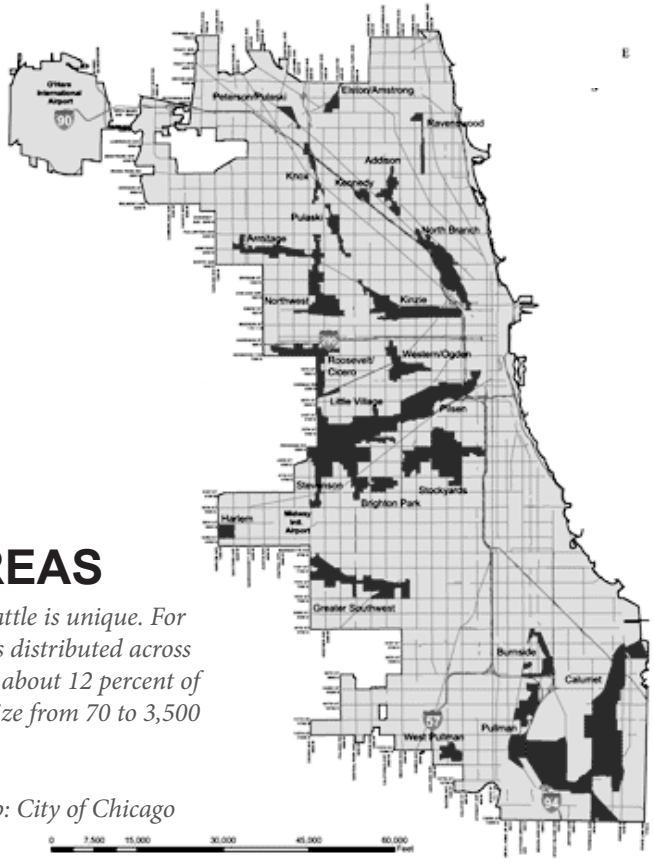
At 932 acres, Ballard-Interbay is among the smallest manufacturing /industrial centers in the Puget Sound region. It has generally small parcels, with an average parcel size of 1.2 acres (the Duwamish has a mix of parcel sizes; the average is higher at 2 acres) and consequently, a finer mix of diverse uses that span light manufacturing, maritime, food processing and warehouse uses. Ballard-Interbay is under great pressure to convert to non-industrial uses because of its prime locational advantages such as proximity to the waterfront, transit, and desirable, high income residential areas.

+ INDUSTRIAL ZONED LAND WORKS AS A CRITICAL COMPONENT OF THE CITY'S LAND USE SYSTEM

There are strong linkages between industrial uses and other sectors. This excerpt from a report on production, distribution and repair uses in San Francisco illustrates this well:

A study in Boston found that nine separate businesses and 200 workers are potentially involved in moving a lobster from the seabed to its final destination over a bed of rice in a restaurant. These include maritime activities, including the fishing company itself, boat storage, and boat maintenance; wholesalers of bait, ice, fuel, and seafood; truck repair services; and companies involved in sales and service of refrigeration equipment.

In Seattle all of these nine uses would be located on industrial-zoned land.



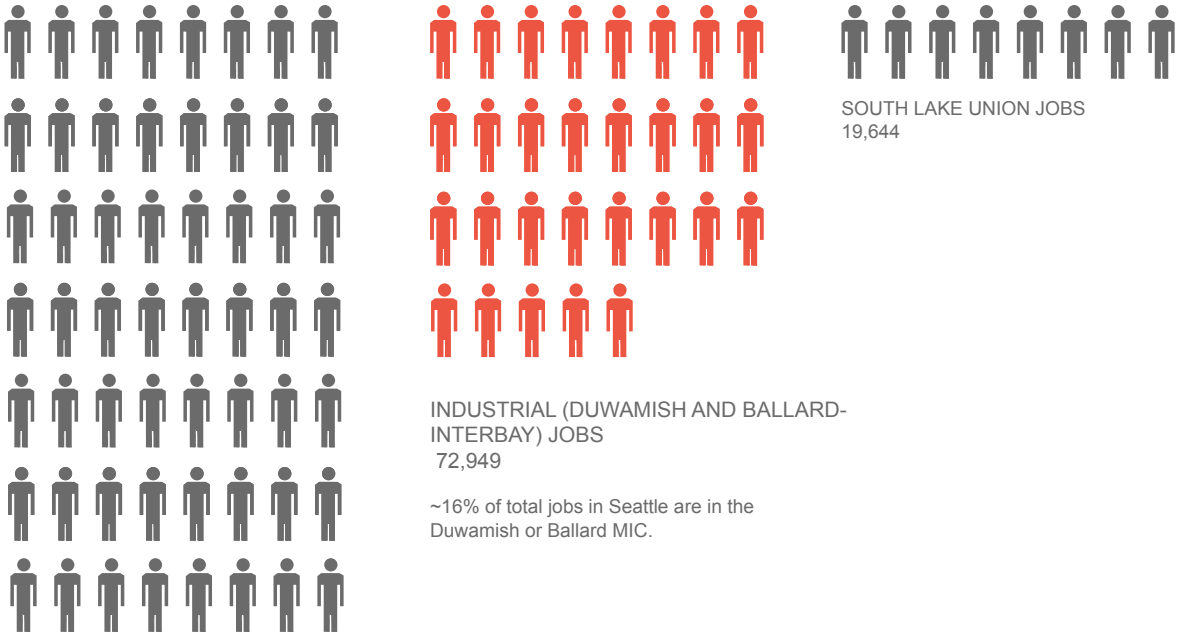
CHICAGO'S INDUSTRIAL AREAS

The pattern of industrial land in Seattle is unique. For example, Chicago's industrial land is distributed across 24 Industrial Corridors, comprising about 12 percent of city land. These corridors range in size from 70 to 3,500 acres.

source of Chicago numbers and map: City of Chicago

+ INDUSTRIAL LAND IS AN IMPORTANT SOURCE OF JOBS AND INCOME

Industrial jobs are important to the city. They are a significant source of jobs for people without a college degree, or people facing language barriers or other barriers to entry. Industrial jobs provide higher wages, and greater benefits and advancement opportunities than other jobs available to low-skilled workers.



DOWNTOWN COMMERCIAL JOBS
136,381

INDUSTRIAL (DUWAMISH AND BALLARD-INTERBAY) JOBS
72,949

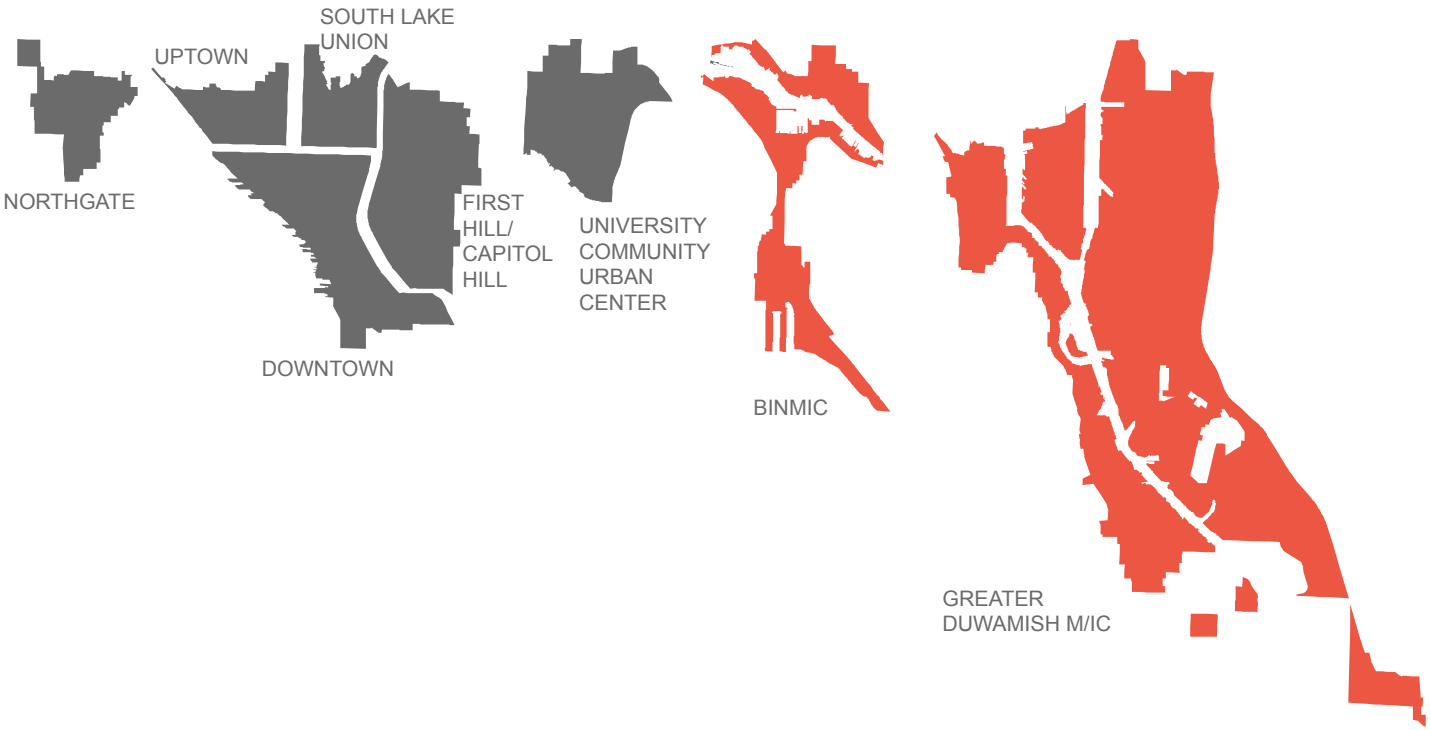
~16% of total jobs in Seattle are in the Duwamish or Ballard MIC.

SOUTH LAKE UNION JOBS
19,644

6196 acres

Seattle has a total of 6196 gross acres of industrial zoned land or 12% of the city. For comparison, 4617 acres or 9% of the city is zoned commercial or mixed-use

SEATTLE'S URBAN CENTERS AND MANUFACTURING/INDUSTRIAL CENTERS
(at the same scale)

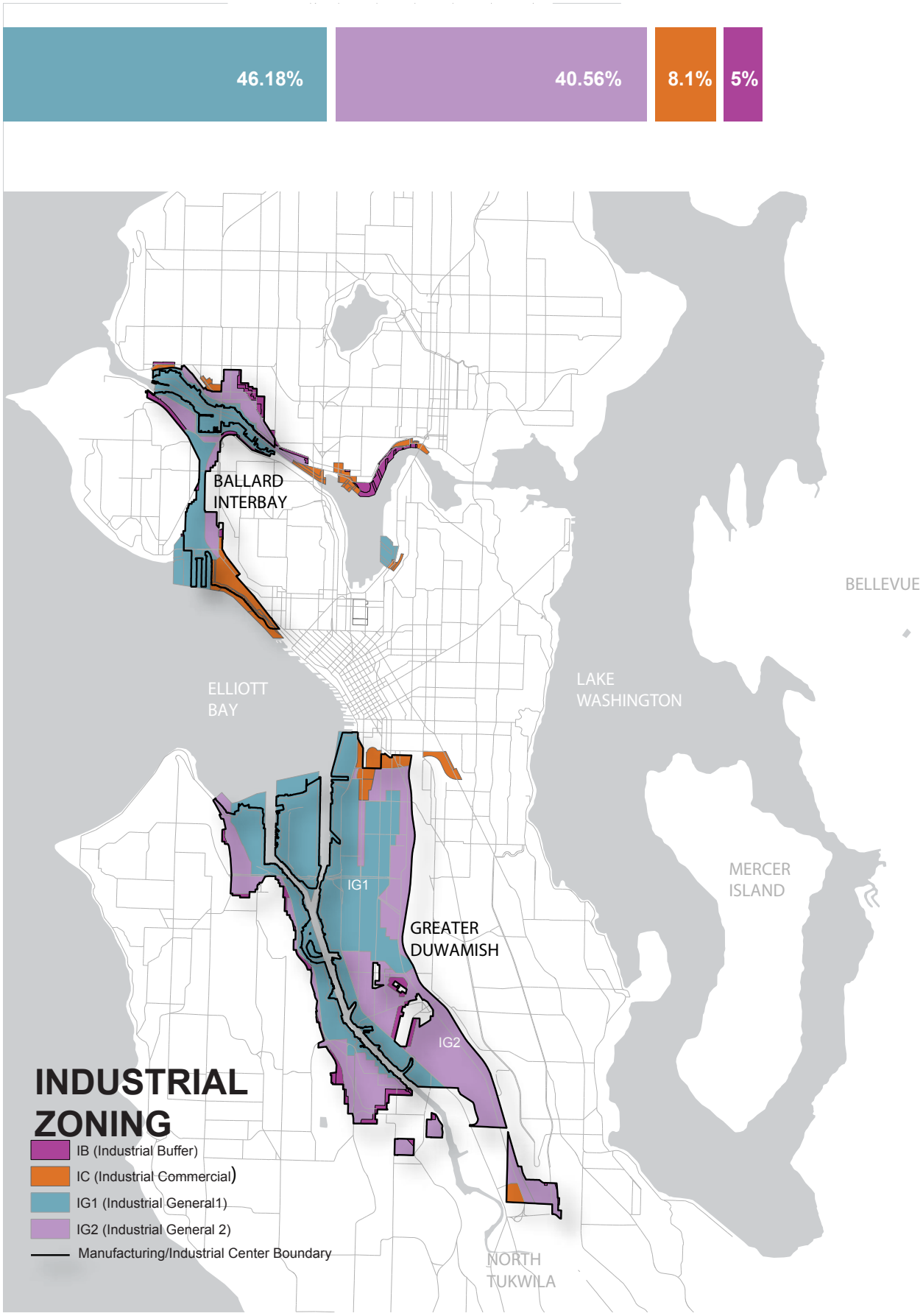


Chuck Cepeda longshoreman at the Port of Seattle is the second generation from his family to work at the Port of Seattle. He has three sons and appreciates the family wage jobs the port supports.

Jeff Krapf frame department woodworker at O.B. Williams Co., works on gluing and clamping a scarf joint of what will become a 25-foot-long, 2-inch-thick teak bar top. O.B. Williams Co., an architectural woodworking company, has been on First Avenue South in Sodo for more than 100 years.

$6 billion per year in taxable retail sales, and
$37 million per year in B&O taxes
24% of B&O taxes and 32% of sales tax the City collects

Photo of Jeff Krapf by Marcus R. Donner and description from 'Puget Sound Business Journal- Faces of Sodo: The story of a changing Seattle neighborhood accessed here: http://www.bizjournals.com/seattle/news/2013/03/29/faces-of-sodo-slide-show.html?surround=etf&ana=e_article


46.18%
40.56%
8.1%
5%
BALLARD INTERBAY
ELLIOTT BAY
LAKE WASHINGTON
BELLEVUE
MERCER ISLAND
IG1
GREATER DUWAMISH
IG2
NORTH TUKWILA
INDUSTRIAL ZONING
IB (Industrial Buffer)
IC (Industrial Commercial)
IG1 (Industrial General1)
IG2 (Industrial General 2)
Manufacturing/Industrial Center Boundary

+ SEATTLE'S INDUSTRIAL DISTRICTS ARE MAINLY ZONED INDUSTRIAL GENERAL 1 OR INDUSTRIAL GENERAL 2

Clustered industrial uses in the Duwamish and the Ballard area eventually led to specific zoning provisions that maintained these areas for industry. Industrial zoned land in Seattle is concentrated in two manufacturing/industrial centers (M/ICs), the Duwamish and Ballard-Interbay.

Seattle's Land Use Code includes four industrial zoning designations: Industrial General 1 (IG1), Industrial General II (IG2), Industrial Commercial (IC) and Industrial Buffer (IB). Citywide, 87% of industrial-zoned land is in Industrial General 1 or Industrial General 2. In the Duwamish, 93% of land is in IG1 or IG2.

KEY DISTINCTIONS

IG1 zones are intended for areas with direct water access, upland property of sufficient depth to accommodate industrial activity, an existing industrial character, areas directly related to major rail lines serving industrial businesses; areas containing mostly industrial uses (manufacturing, heavy commercial, warehousing, transportation, utilities and similar activities); large areas with generally flat topography; and areas platted into large parcels of land.

IG2 zones are intended for areas that are developed with industrial activity or a mix of industrial activity and a wide range of commercial uses;

IC zones are intended for areas that could attract new businesses, near major institutions, former industrial areas in transition and areas where there is an existing concentration of research and development type uses;

IB zones are intended for areas containing industrial uses or a mix of industrial activity and a wide range of commercial uses which are located on the edge of a larger industrial area designated Industrial General 1 (IG1), Industrial General 2 (IG2), or Industrial Commercial (IC) or areas where a transition is needed to protect a less-intensive zone from potential negative impacts of industrial activity. Some industrial uses are not permitted in IB zones. Additional development standards such as for screening and landscaping apply in IB zones.

INDUSTRIAL COMMERCIAL ZONING AN EMPLOYMENT ZONE, NOT NECASSARILY INDUSTRIAL

In the past few years, sites with IC zoning have mostly produced large single-use office buildings, since industrial uses cannot compete with commercial uses on rent. Industrial Commercial (IC) zoning has not resulted in production, distribution and repair type uses.

TRENDS IN MODERN INDUSTRY

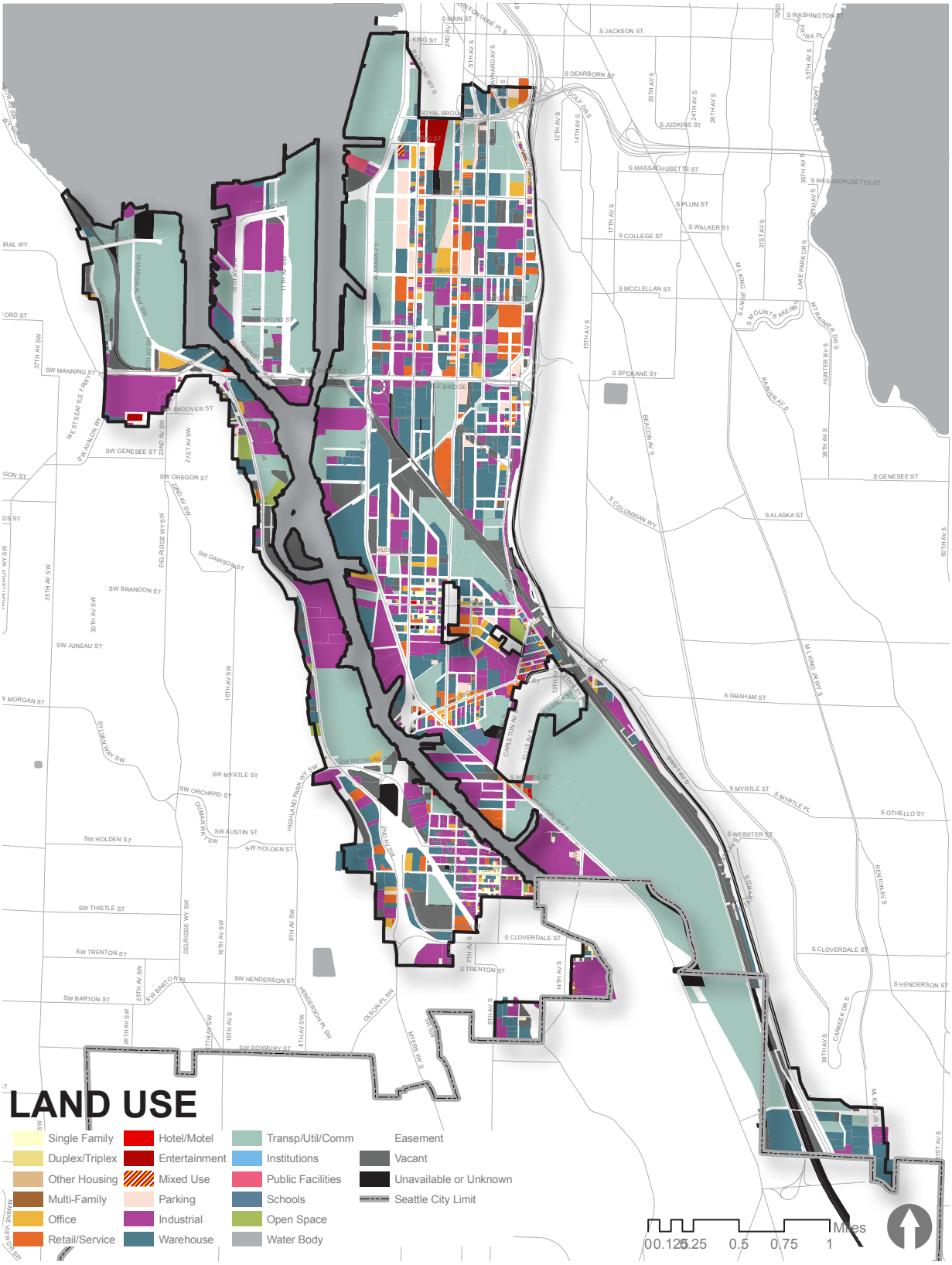
Our research revealed two different trends among industrial uses:

+ On the one hand, new industrial users and investors are migrating to larger parcel sizes and newer one-story buildings

+ On the other hand, the ability to customize production has led to rising demand for low-rent space to house small, craft businesses that require flexible, industrial-grade spaces but may not have the same impacts or infrastructure needs as traditional industrial uses.

There is anecdotal evidence that some of these niche uses are looking for space in industrial and mixed-use areas in the city but are excluded or unable to compete. They are seen as regular office or retail uses and therefore limited in industrial areas, and are unable to afford high rents in mixed-use areas calibrated for conventional office or retail tenants. There is some concern that these types of uses may be shut out of Seattle if they are not able to operate in the city's cheaper industrial zones. How and where these uses can be accommodated, and whether they need industrial-zoned land to function are questions that are outside the scope of this study.

LAND USE			
39% TRANSPORTATION/COMMUNICATION/UTILITIES	21% INDUSTRIAL	18% WAREHOUSE	3%



what are some key characteristics of the Duwamish M/IC?

DUWAMISH

DISTRICT SIZE
4,928 gross acres or
84% of industrial zoned land in the City of Seattle

LAND USE
Major land uses in the Duwamish are transportation, utilities or community facilities (39%), industrial (21%) and warehouses (18%)

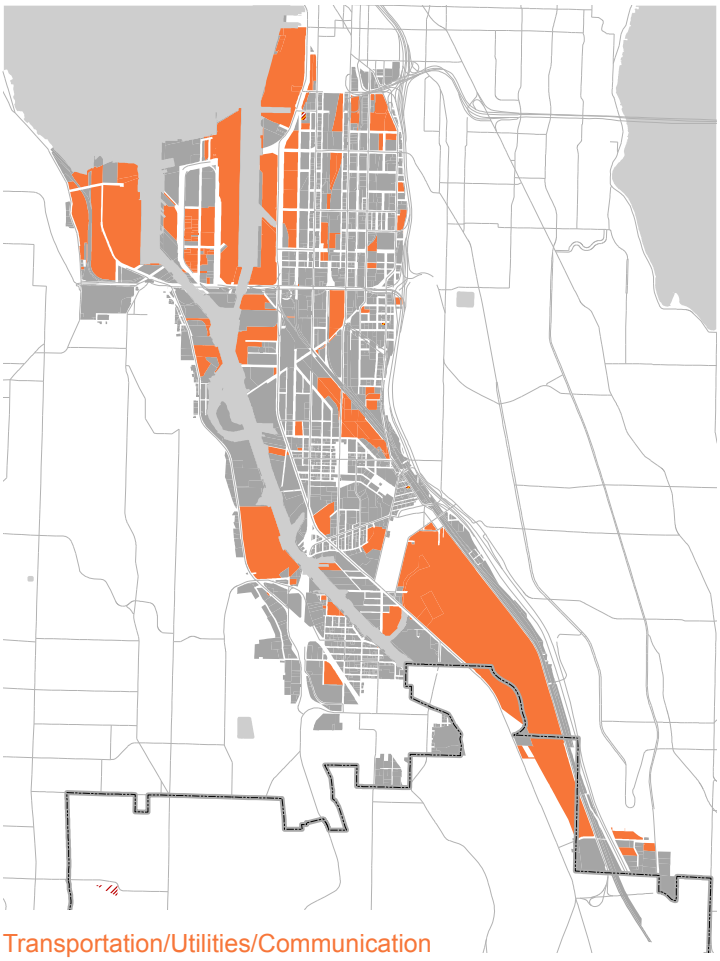
ZONING
93% of the land in the Duwamish is zoned Industrial General 1 (1,965 acres/51%) or Industrial General 2 (1,595 acres/42%)

The Duwamish Manufacturing Industrial Center (M/IC) has been in industrial use for over 100 years and functions as the city's principal industrial area. Duwamish is a major international trade hub, receiving and distributing goods via roadway, water, rail and air. It is located just south of downtown Seattle,and covers nearly 5,000 acres, nearly 84% of industrial-zoned land in the city.

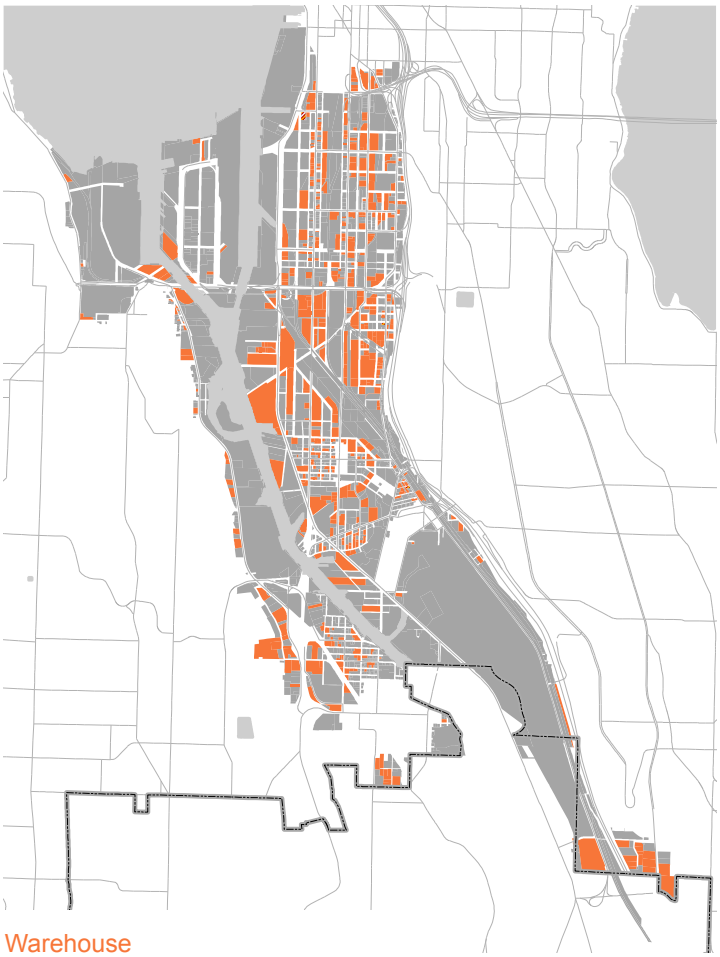
The Duwamish center is the Port of Seattle's primary marine shipping area, with deep water berths, wharfs, piers, shipyards, dry docks, container cranes, on-dock rail, container yards, cargo distribution and warehousing, oil and petroleum storage facilities, and major railroad yards. The area is characterized by a maze of railroad tracks, an assemblage of low, warehouse structures, and towering container cranes and vast container storage areas along the waterfront.

The Duwamish M/IC boundary is discontinuous. It excludes residential and commercial areas around Georgetown, and includes areas south of the King County airport and around South Park.

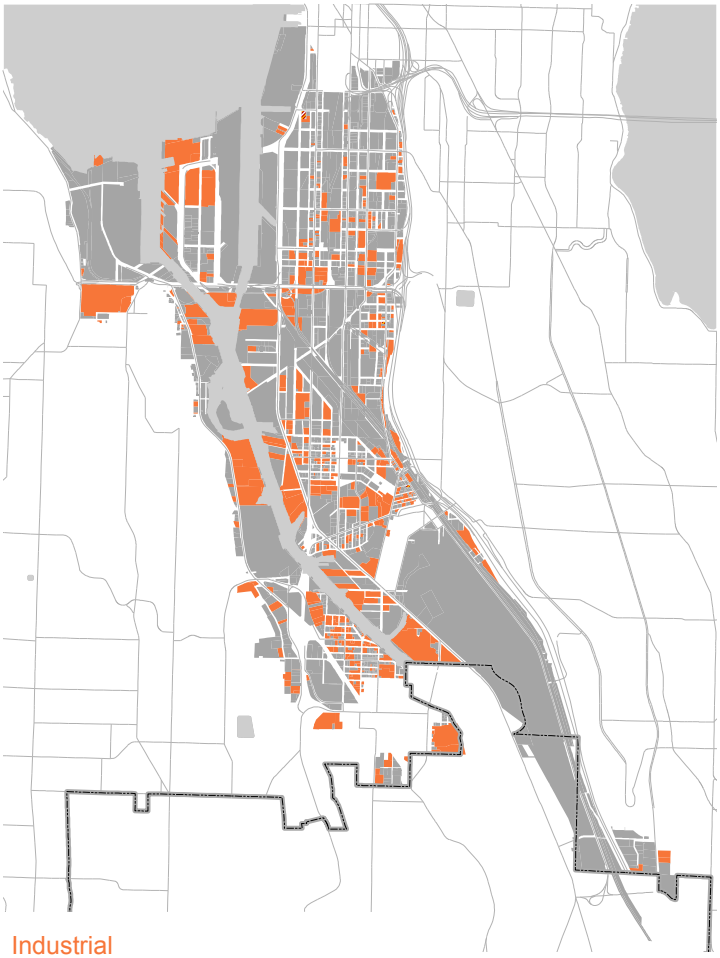
GREATER
DUWAMISH M/IC BOUNDARY AND DISTRICTS



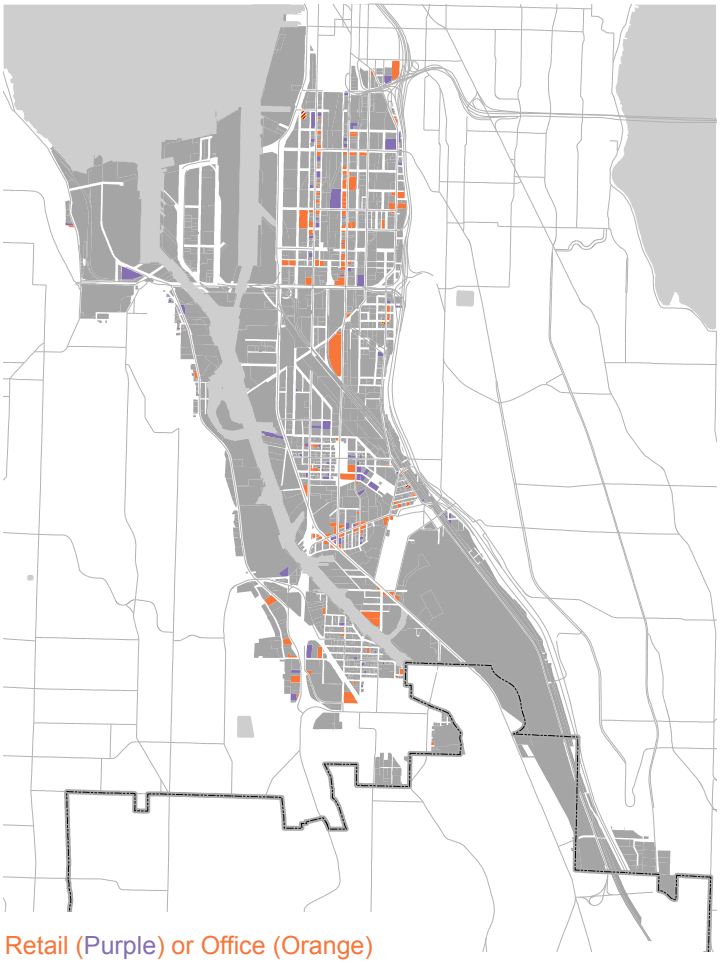
Transportation/Utilities/Communication



Warehouse



Industrial



Retail (Purple) or Office (Orange)

LAND USE PATTERNS

+ THE LARGEST PROPORTION OF LAND IS IN TRANSPORTATION OR UTILITIES USE

The Duwamish is a major logistics hub, and therefore the largest proportion of land (approx. 1800 acres) is devoted to transportation, utilities and communications uses. Uses in this category include critical public infrastructure as well as private market uses. These uses are primarily concentrated along the shoreline as Port of Seattle cargo operations and in three major rail yards, King County's airport, privately owned land used as truck staging areas, and at various sites that serve as locations of freight logistics companies.

The Duwamish's distribution businesses provide important support services to other sectors of the city's economy. Without these businesses several of Seattle's economic engines such as downtown offices, hospitals. retail outlets and restaurants would experience costly supply chain disruptions.

+ RETAIL IS CONCENTRATED

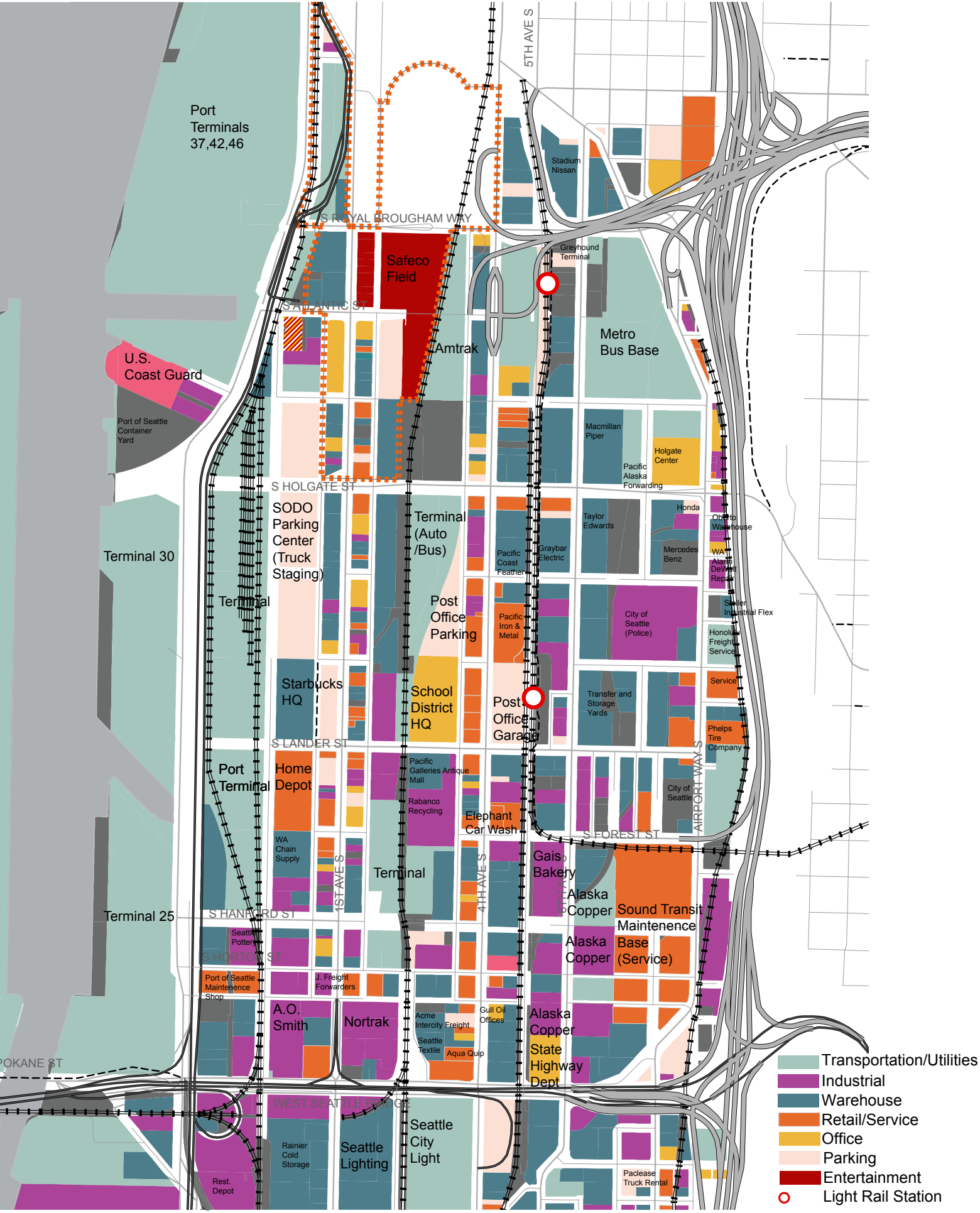
Concentrations in retail and services are evident along two corridors in the Duwamish - 1st Ave. S. and 4th Ave. S., especially in the northern portion, the area commonly called SoDo. Existing zoning allows retail in both of these locations but limits of size vary between the two. IG2 zoning on 1st Ave. S. in SoDo limits general retail to 25,000 SF while IG1 zoning on 4th Ave. S. limits general retail to 10,000 SF.

+ INDUSTRIAL LAND IS USED LESS FOR MANUFACTURING AND MORE FOR STORAGE AND REPAIR AS WELL AS PRODUCTION

A significant proportion of land in the Duwamish is devoted to businesses engaged in repair (truck, car and machinery), storage or production related uses. The term industrial is misleading because current uses tend to be benign, in terms of impacts, as well as more specialized and diverse than traditional smokestack industry. Generally, this report uses the term 'industrial' to refer to a variety of uses directly related to producing, distributing or repairing.

The term 'industrial' is not currently defined in the Land Use Code. While the Comprehensive Plan contains goals and policies that refer to industrial uses (GD-G3 and LU141) it does not contain a specific definition. The Land Use Code, however, defines 'manufacturing use' as well as three types of manufacturing uses, ranging from light, general and heavy, depending on intensity of manufacturing activity and its impacts.

Some industrial uses in the city have few to no impacts, small footprints, activate the street and could mix well with other uses, especially on commercial corridors. Other cities have begun to use the term 'Production, Distribution and Repair' to characterize these uses.



LAND USE IN SODO

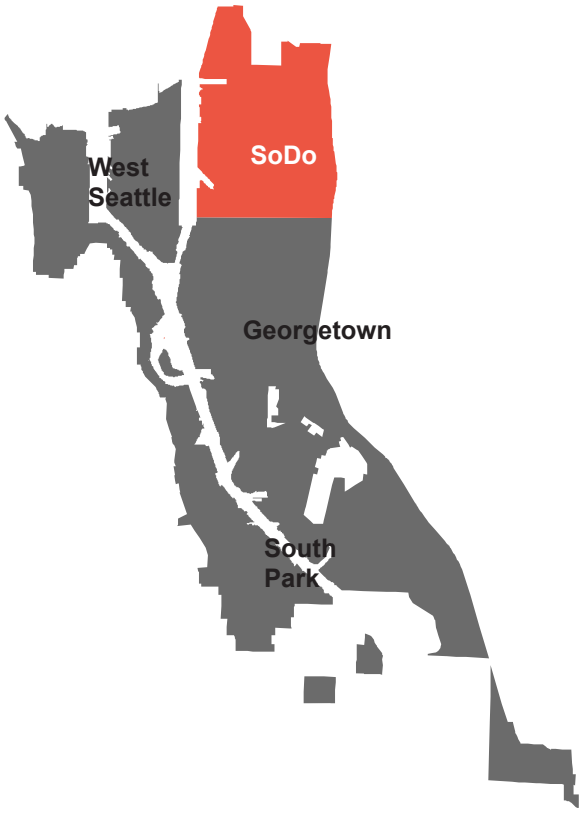
SODO

DISTRICT SIZE
~ 800 net acres (without streets)

LAND USE
Major land uses are transportation, utilities, industrial and warehouses

ZONING
Most of the land in the SoDo area is zoned Industrial General 1 or Industrial General 2 with some Industrial Commercial zoning under the Stadium Transition Area Overlay District

SoDo covers almost 800 acres with nearly 60% of the area in public or railway ownership. This reflects the Port, BNSF, stadium, and County and regional transit facilities all located in the area. SoDo is probably the most familiar industrial area to most Seattleites because of its high-profile businesses, easy visibility from downtown and area highways, as well as being the location for several major retail establishments.



GREATER
DUWAMISH M/IC BOUNDARY AND DISTRICTS

DUWAMISH AND THE CITY: STRONG CONNECTIONS

Several slaughterhouses were located on the tidal flats of SoDo in the late 1800s: Carsten Packing Company, James Henry's Slaughter House and Frye and Co. By the end of the 19th century Frye and Co. in the Duwamish processed cattle, sheep, hogs and chickens from ranches in several western states, and supplied retail sales outlets from Alaska to California

Charles and Emma Frye directed their estate be used to build and maintain a free public art museum to display their art collection. Frye Art Museum was established in 1952.

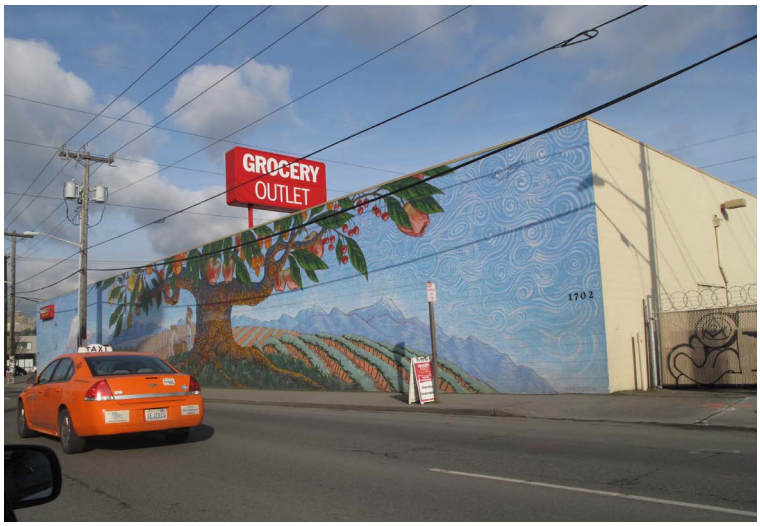
The relationship between industrial areas and the rest of the city continues today whereby the M/ICs, especially the Duwamish, support the city by absorbing large-scale land-consumptive public uses, such as for recycling, transit maintenance and post-office operations - uses that are important to the city but would be disruptive in locations closer to residents or to neighborhood business districts.

Source: WSDOT

Crowd outside Fryes Packing House Market, Seattle, 1943
Seattle Post-Intelligencer Collection, Museum of History & Industry, Seattle;

Several businesses in the Duwamish combine production and wholesale distribution with a retail storefront, such as the Franz bakery on 1st Ave. S.

Pacific Coast Feather on 4th Ave. S.



Several warehouse/outlet retail establishments are located in SoDo. These include Costco, Restaurant Depot, and Pacific Food Imports

Outdoor storage is very common in the Duwamish. This might give one the impression that large areas of land are vacant. Buildings are low and small compared to their lots, the average FAR of industrial uses in the Duwamish is .32

Industrial areas have a different character than other parts of the city. Buildings are separated by yards used for outdoor storage and truck staging, streets lack trees, sidewalks and curbs in certain locations and pedestrian activity is minimal

Temporary uses are common in the Duwamish. Its yards and outdoor truck staging areas are often used as temporary sites for uses like this taco truck

DUWAMISH INDUSTRY TODAY: METALWORKING AND CRANE MACHINERY

Due to the proximity to the Port of Seattle and to local ship building businesses, the metalworking industry has been the historically dominant industry inhabiting SoDo. Over the years SoDo companies have produced every metal product imaginable from brass kettles and pipes for the Rainier Brewery to pipes and fittings for the Alaskan Oil Pipeline. Following the demands of the local metalworking industry as well as the needs of the Port of Seattle several fabricators of cranes and heavy machinery settled in SoDo. Cranes built in SoDo include two specialty cranes for the Space Shuttle staging area at Kennedy Space Center in Florida, the retractable Safeco Field roof and mobile cranes for the construction of the original Spokane Street Viaduct.

SoDo's longest standing metalworking businesses:

Alaskan Copper Works since 1913, Amick Metal Fabricators since 1916, Todd Shipyard since 1916, Pacific Iron and Metal since 1917, Washington Iron Works since 1920, Puget Sound Pipe and Supply Co. 1917-1994 and Sherman Supply and Salvage Co. 1910-2005

SoDo's longest standing crane/machinery businesses:

Peat Belting 1899-2001, Star Rental since 1900, Ederer Crane since 1901, Mobile Crane Co. since 1902, Markey Machinery since 1907

Source: WSDOT

DUWAMISH INDUSTRY TODAY: IMPORT AND EXPORT

The Duwamish is a major hub for logistics and distribution. MacMillan Piper, is a company with facilities in Seattle and Tacoma specialized in transloading a wide range of products, such as lumber, paper, bentonite, refrigerated cargo, steel, and dry bulk commodities. MacMillan-Piper is a designated U.S. Customs Examination Station (CES) for the Port of Seattle, which expedites cargo clearance for importers and exporters. MP also operates USDA-certified food-grade warehouses in both Seattle and Tacoma.

DUWAMISH INDUSTRY TODAY : RECYCLING AND SALVAGE

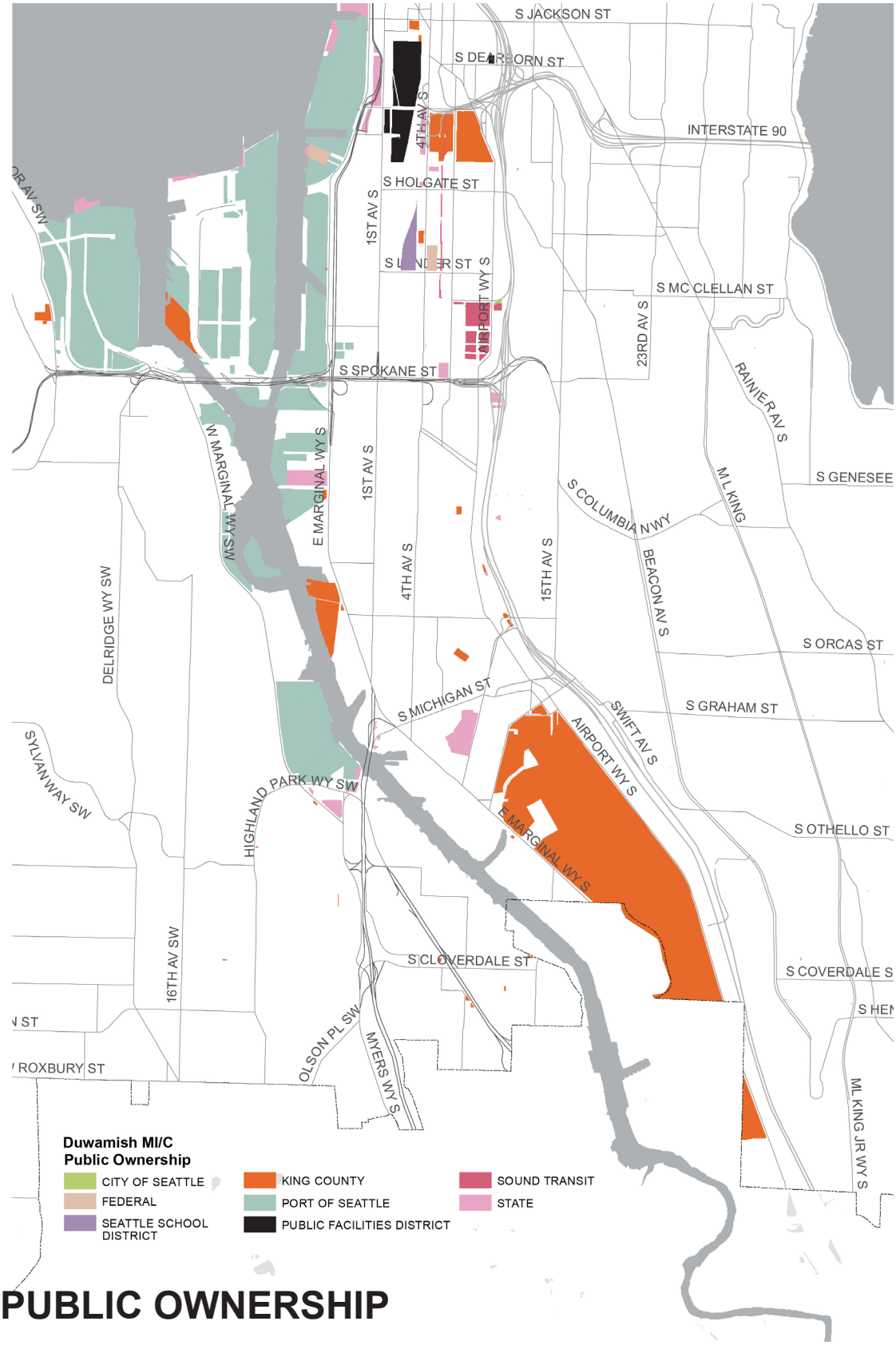
Several of SoDo's metal businesses were founded as scrap dealers and metal recyclers. These include M Bloch company in 1905, Pacific Iron and Metal (1931), Stack Steel and Salvage (1932-1984) and Sherman Supply and Salvage Co. (1910-2005). Several current businesses in SoDo are centered around the recycling of goods and materials, ranging from architectural salvage to electronic recyclers. The building on the corner of 7th Ave. S. and S. Lander St. is a testament to SoDo's recycling industry. It is a dismantled and reassembled Army barrack from Ft.Faragot in Idaho, which was moved to this site by Abe Sherman, who founded Sherman Supply and Salvage Co..

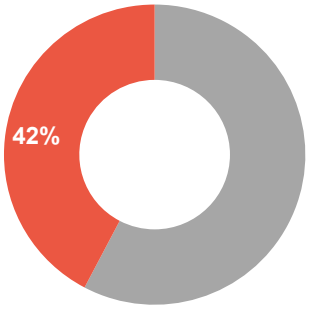
DUWAMISH INDUSTRY TODAY:
SHIFT AWAY FROM MANUFACTURING TOWARD MARKETING AND DISTRIBUTION

Pacific Coast Feather Co. was established in SoDo in 1924. It is a global market leader in the pillow and down comforter industry. Pacific Coast Feather Co. has transformed its operations over the years. It has shifted away from manufacturing towards marketing and distribution at its Duwamish site.

+ 42% OF LAND IN DUWAMISH IS PUBLICLY-OWNED

The Duwamish supports several services and critical infrastructure. 42% of land in the Duwamish is owned by public agencies. These include a Coast Guard facility, Post Office facility, land associated with state highway projects, facilities of the Port of Seattle, Boeing Field airport, Metro's bus base, Sound Transit's light rail base, City fire station, City police facility, and the School District Headquarters. In most of these cases the uses are industrial or transportation related and contribute to the area's transportation infrastructure. These would not be appropriate uses in other parts of the city. In a few cases, however, the public use is not industrial and could be located in other parts of the city.

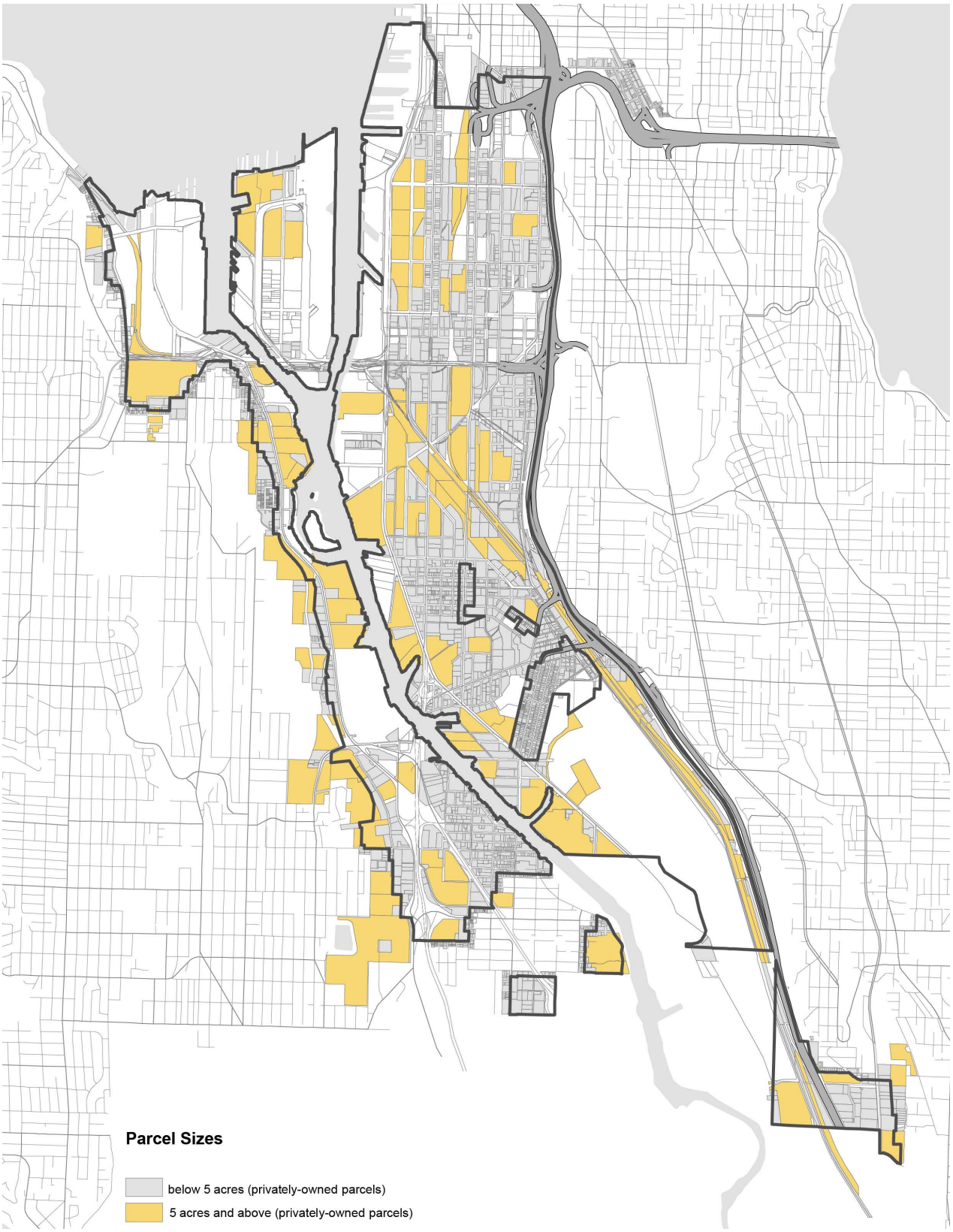




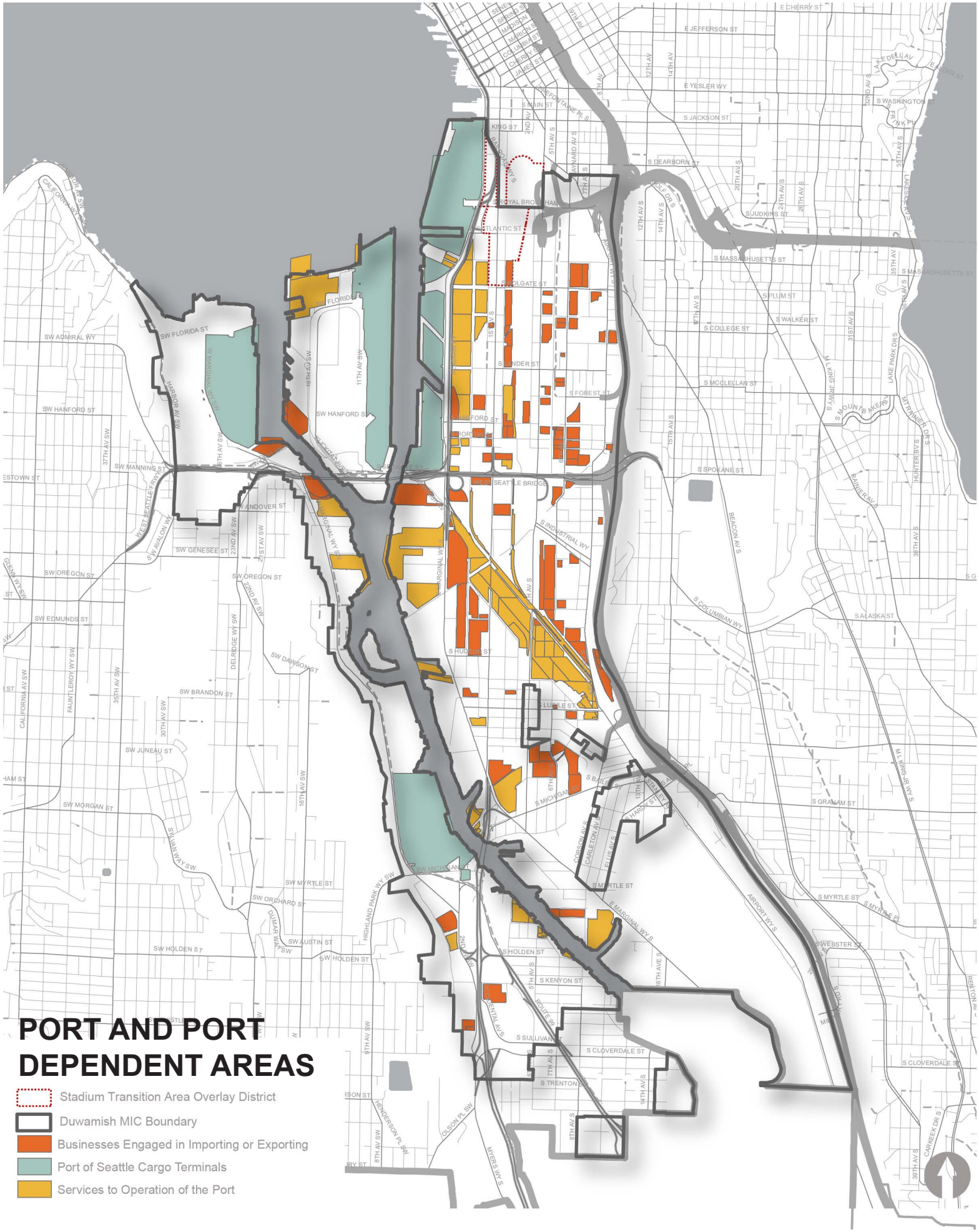
PUBLIC OWNERSHIP

+ THERE ARE FEW LARGE PRIVATELY-OWNED PARCELS IN THE DUWAMISH

The average parcel size in the Duwamish is 2.0 acres which is smaller than average parcel sizes in most other regional manufacturing/industrial centers. The bulk of privately-owned parcels are smaller or close to the average size while the majority of large parcels (over 5 acres) are publicly owned. Research reveals that new manufacturing development is unlikely on parcels smaller than 5 acres.



LOT SIZES


PORT AND PORT DEPENDENT AREAS
Stadium Transition Area Overlay District
Duwamish MIC Boundary
Businesses Engaged in Importing or Exporting
Port of Seattle Cargo Terminals
Services to Operation of the Port

+ PORT FACILITIES AND SUPPORTING BUSINESSES ARE FOUND THROUGHOUT THE DUWAMISH

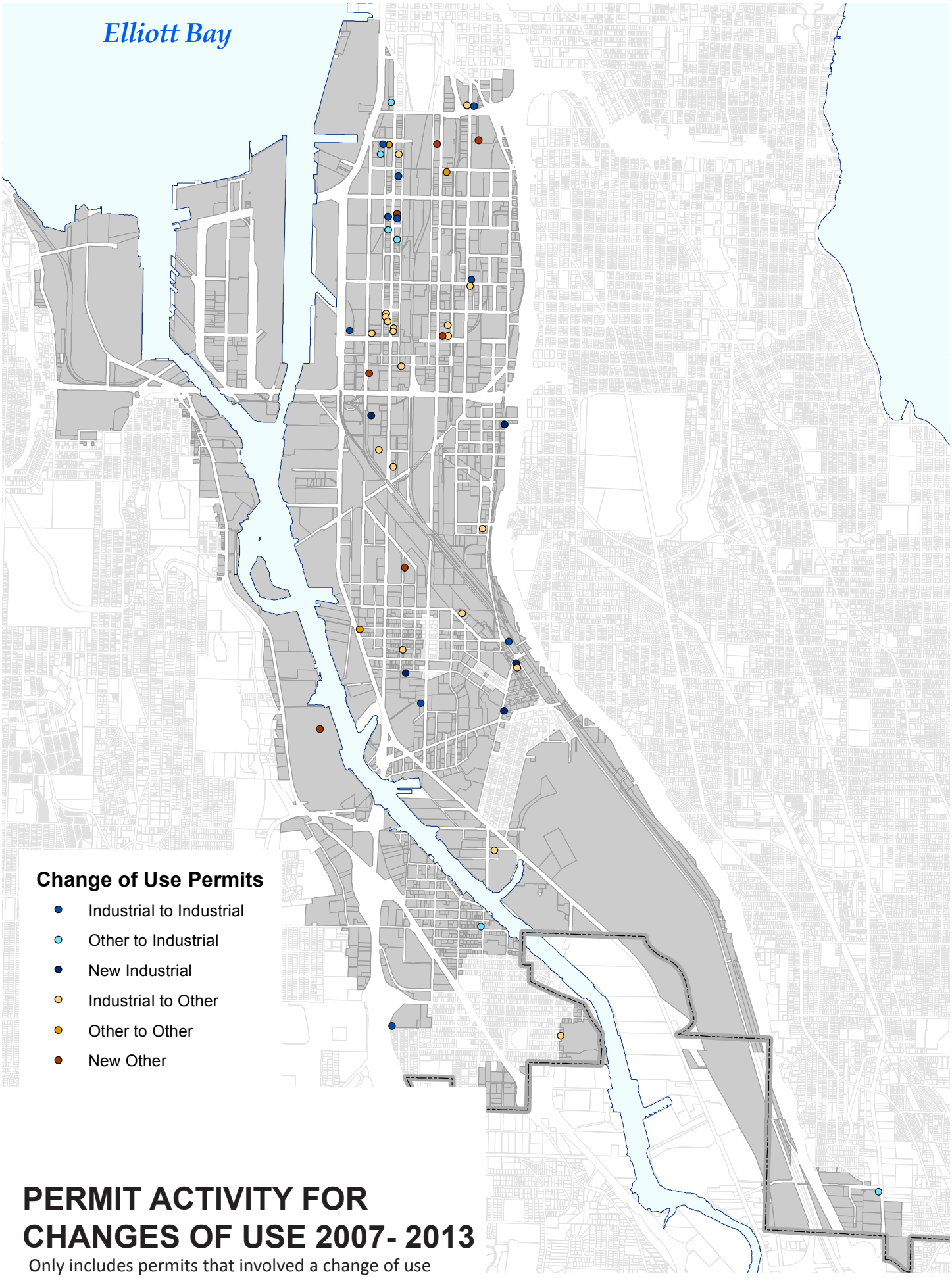
Seattle has been a commercial port city from its founding in 1851. The chaotic sprawl of rail lines, docks and warehouses that characterized early development along the Elliott Bay waterfront has since evolved into a large and diverse port.

The Port of Seattle seaport is comprised of 1,543 acres of waterfront land and nearby properties, located largely in the Duwamish M/IC and to a lesser extent in the Ballard Interbay M/IC. The uses on these properties include container terminals, general purpose marine terminals, refrigerated cargo storage, break-bulk cargo operations and a recently expanded foreign trade zone.

Nearly 800 acres of the Port's seaport is dedicated to container terminal operations and cargo handling. Most of the freight is shipped by inter-modal containers that are transferred to or from railcars or trucks on the dock. Some of the containers are shuttled by truck between the docks, BNSF and UPRR inter-modal yards.

The proximity between the marine cargo terminals, and rail yards in the Duwamish, provides specific logistical advantages. Typically, export products, like bulk grain, timber and steel, are more dependent on proximity to rail. Since the cost of moving cargo is related to the speed at which the commodity can be switched between modes, Seattle has a particular geographical advantage in having marine cargo terminals and railroads located near each other in the Duwamish.

Besides these direct land uses, several ancillary businesses support the Port and its commercial and maritime activities. These include businesses engaged in importing or exporting as well as services or transportation infrastructure critical to the operation of the Port. In the Duwamish, these businesses and services form no specific geographic pattern or cluster and are scattered across the entire area. *(see map on left)*



PERMIT ACTIVITY FOR CHANGES OF USE 2007- 2013

Only includes permits that involved a change of use

+ THE DUWAMISH IS A DYNAMIC PLACE BUT CHANGES OF USE ARE CLUSTERED

Between 2007 and 2013 there were 52 permits issued by DPD that involved a change of use on industrial-zoned propoerty in the Duwamish. Within this six-year period, 20% of the permits were for changes from one industrial use to another industrial use. Half of the permits issued were for a change from industrial to non-industrial use. The remaining 30% were for establishing a new use, such as when parking lots or vacant lots converted to other uses.

A significant proportion of the changes were along the highly visible corridor of 1st Avenue S. especially in SoDo. A minor pattern seen in permit data is the conversion of warehouses to offices, as well as to distilleries or breweries, or auto-repair and sales services.

The Seattle Municipal Code permits some non-industrial uses, subject to size of use limits. Currently, two sets of size of use limits apply to industrial zones. The first set applies to all of the industrial zones while the second set applies to IG1 and IG2 zones in the Duwamish M/IC. Size of use limits for all industrial zones apply to office and retail uses. In the Duwamish a different set of size of use limits apply to retail, restaurants, drinking establishments and meeting halls.

The following table lists existing limits on the size of non-industrial uses:

Limits on Accessory Uses

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. This means that if the principal use is unrestricted, then an accessory use can be unlimited in size. Where there are multiple uses on a site, it may not always be clear which use or uses should be recognized as a principal use, and which qualify as accessory uses.

Land Use Code (Chapter 23.84A - DEFINITIONS) definitions of the two are below:

"Use, principal" means a use that is not incidental to another use.
"Use, accessory" means a use that is incidental to a principal use.

Size of Use Limits

Size limits on non-industrial uses are structured to limit size per lot. However, these limits have sometimes been avoided on large lots by dividing the property into multiple smaller lots. A single large building can even be constructed spanning these lots provided there are firewalls or other separations along lot lines.

Size of use limits also apply separately to each principal use on a lot. For example, one business establishment in a single building could have multiple principal uses, each of which would be subject to separate size of use limits, so the building overall could exceed the size limits. In recent years, permit applications have included uses such as a restaurant, dance hall and lounge as separate principal uses in one building.

Table A for 23.50.027
Size of Use Limits in Industrial Zones

Uses Subject to Size Limits	IG1	IG2	IB	IC Outside the Duwamish MIC	IC Within the Duwamish MIC
Animal Shelters and Kennels*	10,000 sq. ft.	10,000 sq. ft.	75,000 sq. ft.	75,000 sq. ft.	N.S.L., except 75,000 sq. ft. in IC 85-160 zone
Drinking establishments**	3,000 sq. ft.	3,000 sq. ft.	N.S.L.	N.S.L.	N.S.L.
Entertainment*	10,000 sq. ft.	10,000 sq. ft.	75,000 sq. ft.	75,000 sq. ft.	N.S.L., except 75,000 sq. ft. in IC 85-160 zone
Lodging Uses*	10,000 sq. ft.	10,000 sq. ft.	75,000 sq. ft.	75,000 sq. ft.	N.S.L., except 75,000 sq. ft. in IC 85-160 zone
Medical Services*	10,000 sq. ft.	10,000 sq. ft.	75,000 sq. ft.	75,000 sq. ft.	N.S.L., except 75,000 sq. ft. in IC 85-160 zone
Office	10,000 sq. ft.	25,000 sq. ft.	100,000 sq. ft.	N.S.L.	N.S.L.
Restaurants	5,000 sq. ft.	5,000 sq. ft.	N.S.L.	N.S.L.	N.S.L.

Retail Sales, Major Durables	10,000 sq. ft.	25,000 sq. ft.	75,000 sq. ft.	75,000 sq. ft.	N.S.L., except 30,000 sq. ft. in IC 85-160 zone
Sales and Services, Automotive	10,000 sq. ft.	25,000 sq. ft.	75,000 sq. ft.	75,000 sq. ft.	N.S.L.
Sales and Services, General	10,000 sq. ft.	25,000 sq. ft.	75,000 sq. ft.	75,000 sq. ft.	N.S.L., except 30,000 sq. ft. in IC 85-160 zone

Key for Table A for 23.50.027
N.S.L. = No Size Limit
* Where permitted under Table A for 23.50.012.
** The size limit for brew pubs applies to that portion of the pub that is not used for brewing purposes.

B. The following exceptions to the size limitations in Table A for 23.50.027 are allowed for a structure existing as of September 26, 2007:

1. A use legally established as of September 26, 2007 that already exceeds the size limitations listed in Table A for 23.50.027 may continue.

2. Subject to the limitations in subsection 23.50.027.E, the gross floor area of a use listed in Table A for 23.50.027 and legally established as of September 26, 2007 may be converted to another category of use listed in Table A for 23.50.027 provided that the combined gross floor area devoted to uses listed in Table A for 23.50.027 does not exceed the total gross floor area of such uses legally established as of September 26, 2007.

3. If 50 percent or more of the gross floor area of the structure has been legally established as of September 26, 2007 with a use or uses listed in Table A for 23.50.027, those categories of uses may exceed the size of use limits as follows:

   a. Uses listed in Table A for 23.50.027 may expand within and occupy the entire structure.

   b. The structure may be expanded by up to the following amounts and the use or uses may be permitted to expand within and occupy the entire structure:

      1) IG1 and IG2 Zones: 20 percent of the existing structure's gross floor area or 10,000 square feet, whichever is less;

      2) IB and IC Zones: 20 percent of the existing structure's gross floor area or 20,000 square feet, whichever is less.

RECOMMENDATION #1

Adopt specific policy in the Comprehensive Plan that will restrict removal of land from the Duwamish M/IC

Add this new policy to the Urban Village Element:

Do not remove land from a designated Manufacturing/ Industrial Center unless:

- the proposed use is specifically described
- there is insufficient appropriately zoned land elsewhere in the city for the proposed use;
- the proposed use would not displace an existing industrial use; and
- the proposed use would not adversely affect nearby industrial operations.

+ AUTO DEALERSHIPS AND RELATED USES ARE A GROWING PRESENCE IN THE DUWAMISH

Several auto-dealerships have recently relocated to the Duwamish from Downtown, South Lake Union or Denny Triangle. Auto-dealerships are valuable retail uses. They are the largest consumer retail sector in the country and therefore a significant source of sales tax revenue. They also provide jobs with low barriers to entry.

Auto-dealerships look for areas of the city with good access and visibility and relatively large, inexpensive sites. In addition to these physical characteristics, they also look for proximity to employment hubs and large customer bases, such as Downtown or the University District. Some dealers have located in low-value land near major arterials or freeways or in areas in transition where land is vacant until the market is ripe for redevelopment. Today, much of Seattle is built out or facing development pressure, and these types of desirable sites are harder to find or no longer available in certain locations. Zoning changes in several neighborhoods also do not support auto-dealerships as a use, largely because their outdoor storage of cars has negative impacts on the pedestrian environment. For all these reasons, potential sites within the city for dealerships have shrunk severely.

Much of the auto-dealership business is devoted to the storage of cars and can be thought of as a use similar to warehousing. Dealerships also have large service and repair functions in their operations, which are similar to existing uses on industrial-zoned land. Their impacts, measured in terms of vehicle trips, are higher than light industrial uses but lower than a restaurant and similar to a wholesale tire store, mini-warehouse or lumber store.

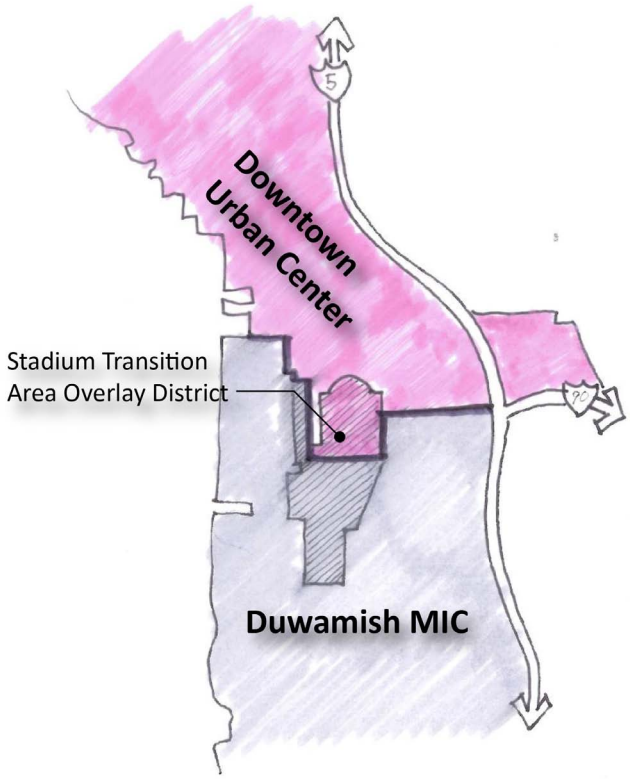
The use profile of auto-dealerships may therefore be a reasonable fit with the characteristics of industrial-zoned land in the Duwamish. Several dealerships have recently migrated from South Lake Union or Downtown to sites near Airport Way in the Duwamish. The prototypical auto-dealership uses 5 acres of land with a single-story building of 20 to 30,000 SF. Existing size limits of 25,000 SF for retail in IG2 zones are therefore lower than their needs.

Auto-repair shops and service centers near the Mercedes-Benz dealership on Airport Way in the SODO area of the Duwamish M/IC

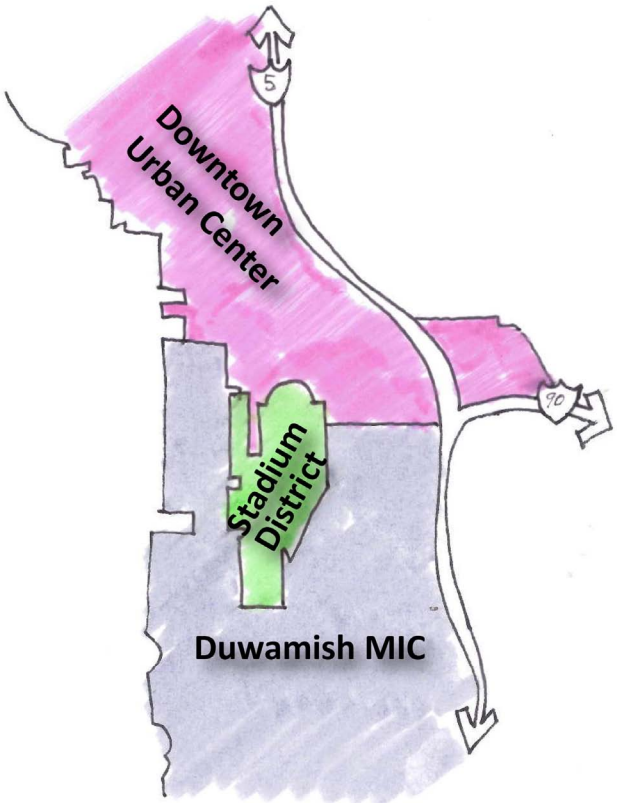
RECOMMENDATION #2

Consider removing the stadium overlay district from the M/IC and treating it as its own unique geographic designation

Retain existing M/IC boundaries, with the possible exception of the stadium area



Existing Comprehensive Plan Designation
Source: DPD's Stadium District Plan



Proposed Comprehensive Plan Designation

RECOMMENDATION #3

Rather than adopt a Port Overlay District; apply the same regulations to the entire Duwamish M/IC

RECOMMENDATION #4

Do not allow any new Industrial Commercial (IC) zoning in the Manufacturing/Industrial Centers

Over the past years, Industrial Commercial (IC) zoning has mainly produced large, single-use office buildings, due to its generous allowances for office and retail uses. Additional Industrial Commercial zoning is therefore not suitable for the Duwamish M/IC.

Add this new policy to the Land Use Element:

Because of its higher allowance for non-industrial activities, such as offices, the Industrial Commercial (IC) zoning designation is not appropriate in the City's Manufacturing/ Industrial Centers, and the City should not rezone land in the M/ICs to IC.

The Home Plate development in SoDo is on land zoned IC-65

RECOMMENDATION #5

Increase effectiveness of regulations limiting the size of non-industrial uses in the Duwamish M/IC by addressing subdivision of large lots

Proposed Changes:

- Amend the Land Use Code to set a new total maximum for all non-industrial uses combined on a site.
- Amend the Land Use Code to include a lower maximum floor area ratio (FAR) for non-industrial uses on a site.

RECOMMENDATION #6

Explore options to delineate an 'Auto Row,' possibly along Airport Way, to allow this retail sector to continue to locate in the city while limiting impacts to industrial uses

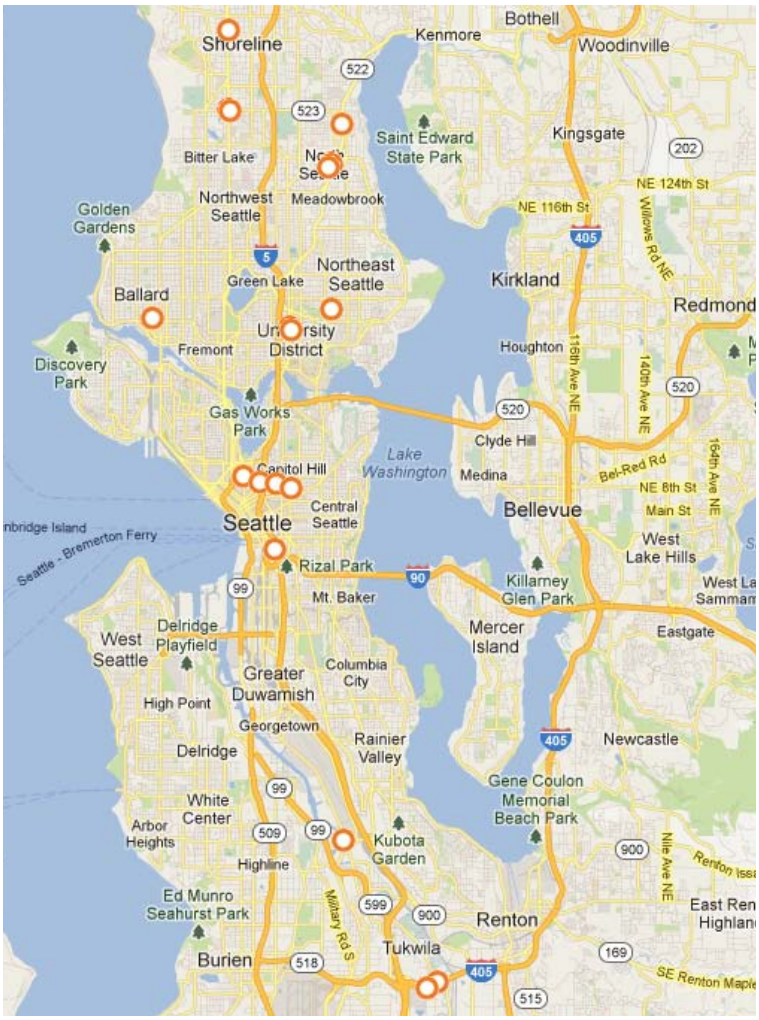
Current Auto Dealership Locations :

The map on the right shows the current location of auto-dealerships in Seattle. Dealerships are clustered in the following locations:

- Lake City Way
- Aurora Ave N
- University District
- Downtown/Capitol Hill
- SouthCenter

Of these, the downtown Honda and Toyota dealerships have announced plans to move to Airport Way in the Duwamish. The dealerships in Ballard and the University District as well as the remaining dealerships in Downtown and Capitol Hill may face pressure to move from their current locations as demand for land rises in these areas.

Auto dealerships prefer to locate on large lots, such as those found in industrial areas. As a retail use that can afford higher land costs than typical industrial businesses, dealerships could have a disruptive effect on the industrial area. Allowing dealerships but limiting them to a confined geographic area could control the impacts to land costs.



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