Kent Industrial Lands Market Analysis and Industrial Site Design Analysis

November 2019

Prepared for:
City of Kent

ECONorthwest
ECONOMICS · FINANCE · PLANNING

MACKENZIE.

This page intentionally blank

Background and Purpose

Located in the southeast portion of the Puget Sound region, the Kent Industrial Valley has become increasingly attractive for many industrial uses due to its flat terrain, availability of transportation connections, and the proximity to Seattle, Tacoma, and SeaTac Airport. Within the Kent Industrial Valley is Kent's Manufacturing/Industrial Center (MIC), one of nine Manufacturing/Industrial Centers in the Puget Sound region with strategic goals for more intensive industrial activity. These regional centers are identified for strategic growth, economic development and infrastructure investments to improve mobility of people and goods[1]. The City hired Mackenzie and ECONorthwest to conduct an industrial needs assessment for the valley and to develop a vision and strategic plan for the Kent Industrial Valley.

ECONorthwest completed this market and employment trends analysis to help the City of Kent and the Rally the Valley Advisory Panel understand how the industrial sector has changed in the Kent Industrial Valley economy relative to neighboring regions in Washington that boast similar market strengths. This white paper provides the summary of the industrial profile.

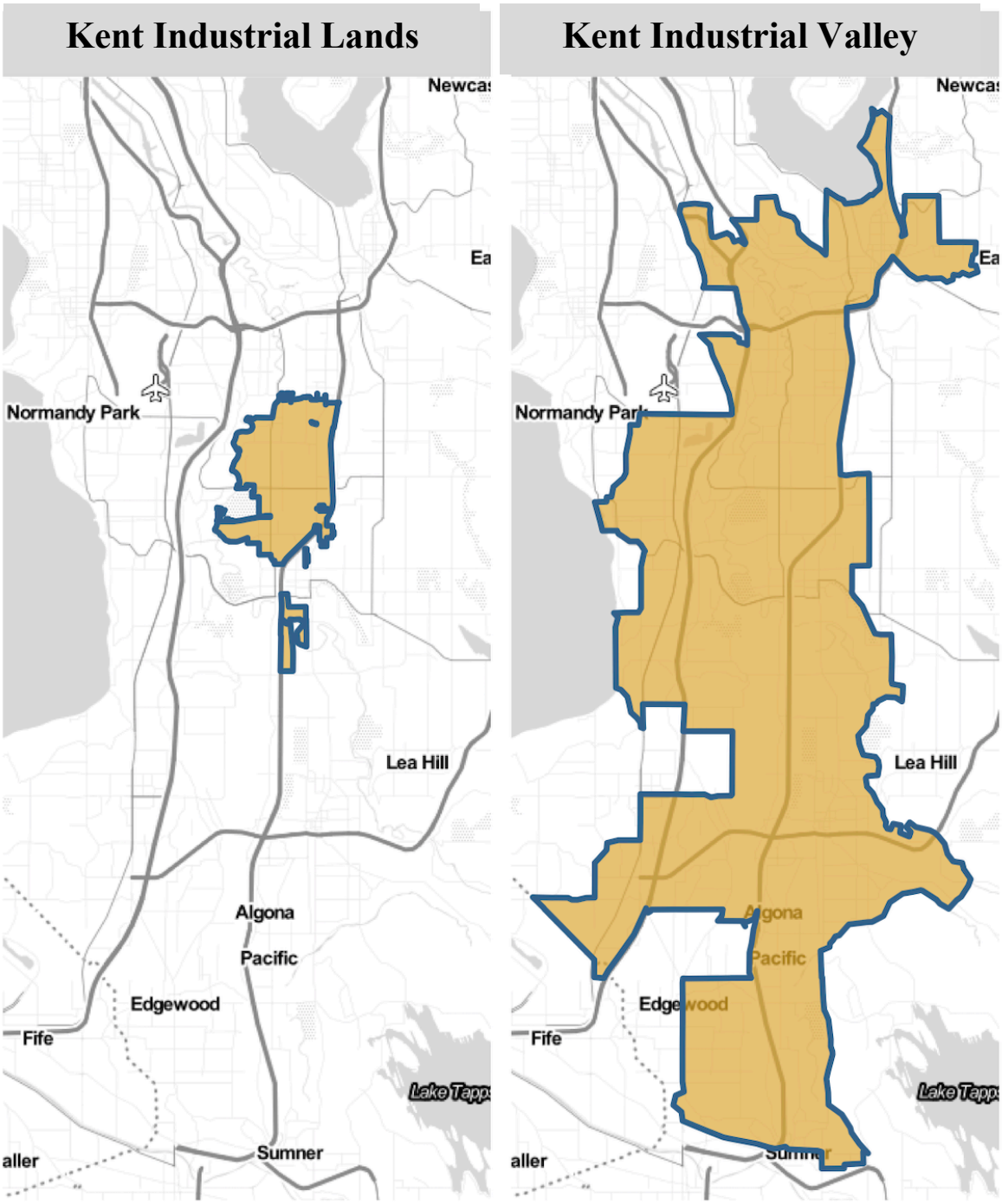
This document is organized as follows:

- **Employment Trends Analysis.** This analysis examines the employment shift by industry trends in the valley and the greater Puget Sound Region.
- **Industrial Land and Building Composition.** This section examines the current industrial use by industry and includes a review of existing building use and total square footage of the industrial sector. This section also includes maps of the Kent Industrial Lands building use by parcel and vacant lands.
- **Market Analysis.** This section provides a summary of current and recent industrial, office, and retail market condition trends. Included in this analysis is a review of lease rates and vacancy rates for each comparison market area.
- **Employee Characteristics.** This section provides a summary of employee demographics that include income, education, skills, and commute characteristics.
- **Market Area Demographic Snapshot.** This section provides a summary table of Kent Industrial Valley market area demographic information and forecast population and employment.
- **Code Standards.** This section provides a summary of the impeding goals in the current code and an example of some other jurisdiction's codes.
- **Design and Site Characteristics**. This section provides a summary of typical industrial site types and design characteristics.

[1] Puget Sound Regional Council. 2009. Vision 2040: The Growth Management, Environmental, Economic, and Transportation Strategy for the Central Puget Sound Region.

This white paper evaluates trends and data for two geographies, the Kent Industrial Valley and Kent Industrial Lands. The Kent Industrial Valley geography represents a larger economic region that includes employment areas in Kent, Renton, Auburn, Lakeland North, Lakeland South, Algona, Pacific, Edgewood, and Sumner. The Kent Industrial Lands geography represents only the City of Kent portion of the Kent Industrial Valley.

Exhibit 1. Kent Industrial Valley and Kent Industrial Lands Geographies



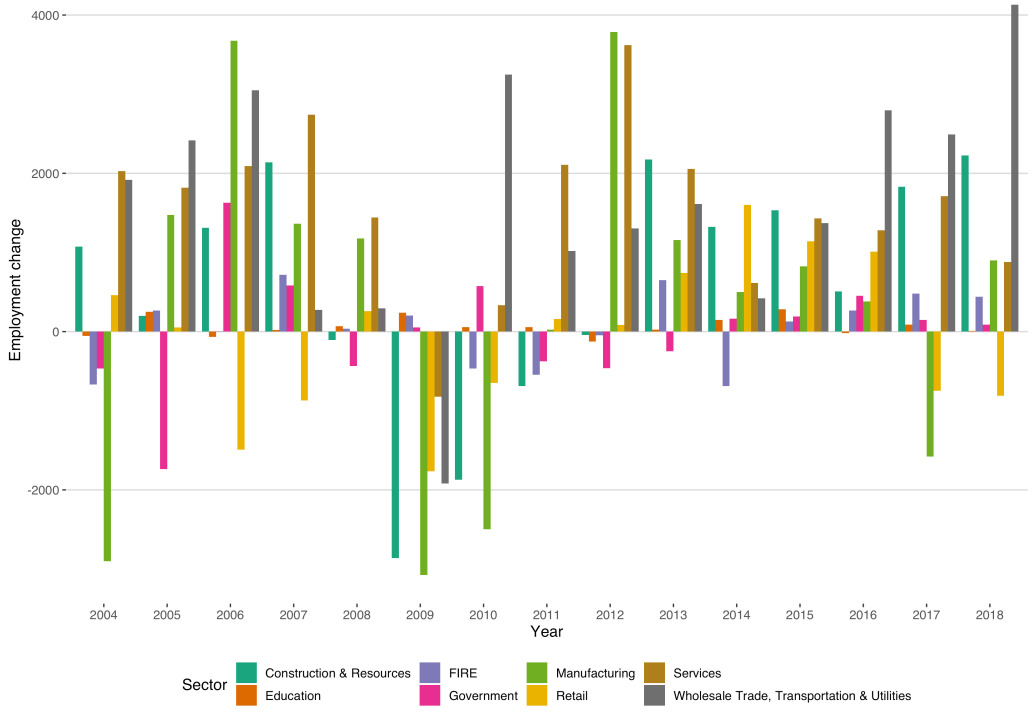
Employment Trends Analysis

The Puget Sound Region has realized significant job growth in the current business cycle coming out of the 2008 recession. The Kent Industrial Valley, like the Puget Sound Region, has also seen significant job growth over the last ten years. The Kent Industrial Valley is currently home to over 10,057 businesses.

In 2018, there were nearly 252,000 employees who worked in the Kent Industrial Valley. Between 2008 and 2018, there were approximately 37,000 new jobs that were added to the Valley. In this ten-year period, employment growth occurred in nearly every industry category, with the exception of retail which saw a 3 percent decline. Three industry categories saw the largest increases in employment in the last ten years; manufacturing, transportation and warehousing, and construction. Exhibit 2 shows annual employment changes by industry category.

The Kent Industrial Valley plays an important role in the regional manufacturing industry base. There are nearly 49,000 manufacturing jobs in the Kent Industrial Valley. Sixty percent of all the manufacturing jobs in the Kent Valley—and about 12% of all Kent Valley employees— are in advanced manufacturing industries, industries that require a workforce that has a high degree of training or advanced education.[2] The Kent Industrial Valley is home to over 22,000 aerospace manufacturing jobs including those at Boeing and Blue Origin. Additionally, there are 7,100 jobs in the Kent Industrial Valley in advanced manufacturing industries outside of the aerospace industry.

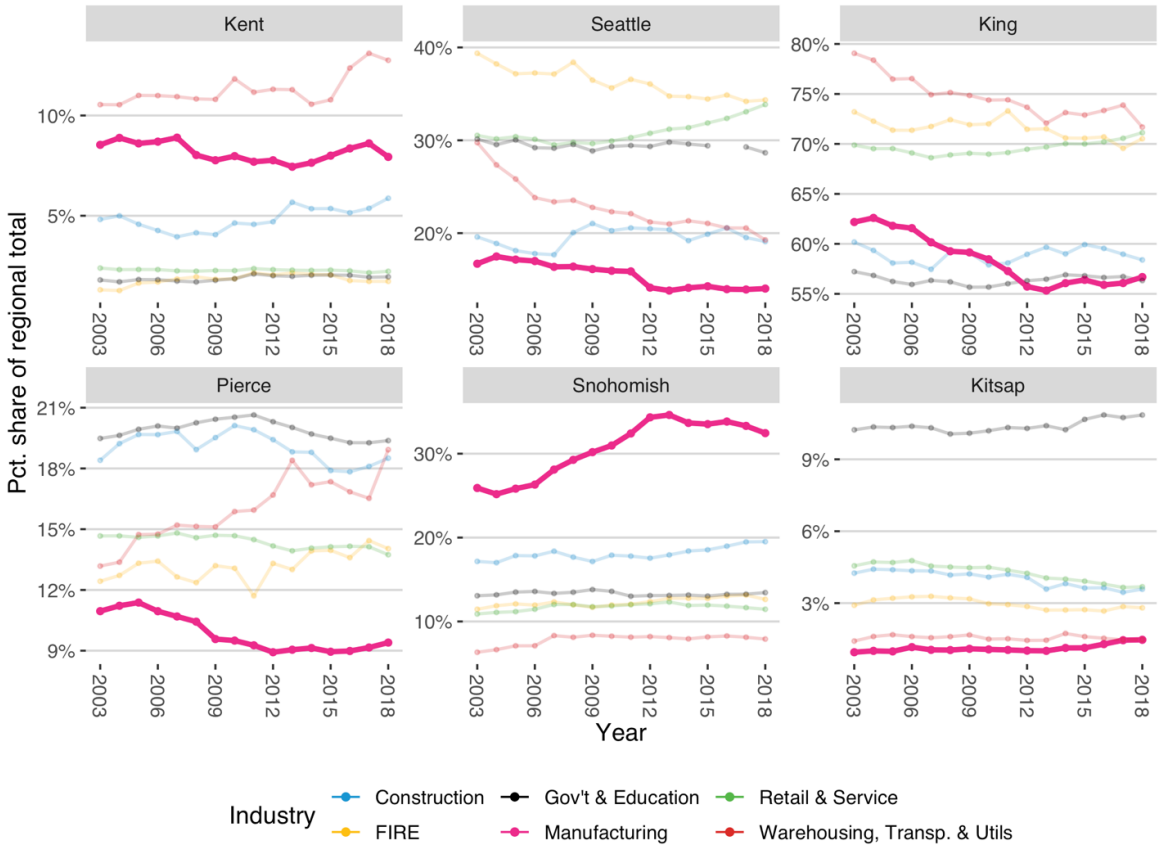
Exhibit 2. Kent Industrial Valley Annual Employment Change by Industry Category



Source: Puget Sound Regional Council, Washington State Employment Security Department

[2] https://www.brookings.edu/wp-content/uploads/2015/02/Advanced-Industries-Data-and-Methods-Appendix.pdf

Exhibit 3. Share of Employment by Industry



Source: PSRC Covered Employment

Data from the Puget Sound Regional Council also indicates that the Kent Industrial Valley is capturing a larger share of regional manufacturing employment compared to other cities and counties in the region. Seattle's share of manufacturing sector jobs saw the largest decline in the region during this period, falling by about 8 percent since around the 2008 recession and into the last several years. As a result, other jurisdictions in the region - mainly Kent, Auburn, Renton, and Everett - have seen a commensurate increase in their regional shares. While Seattle saw losses in the manufacturing sectors between 2003 and 2018, Kent's share remained relatively stable, ultimately netting a 0.5 percent increase over the period. The construction, warehousing and transportation sectors in Kent saw relatively larger increases over the period. Taken together, this would indicate that Kent's mix of manufacturing and distribution industries are remaining stable as King County moves towards an economy dominated by high tech and medical services. Changes in regional shares of employment for manufacturing and other industrial uses indicates that the Kent Industrial Valley will continue to have regional competitive advantages to grow employment in manufacturing industries.

Exhibit 4. Share of Regional Manufacturing Employment

	Pierce County	Snohomish County	Kent Industrial Valley
2008	10%	29%	26%
2018	9%	32%	27%

Source: PSRC Covered Employment

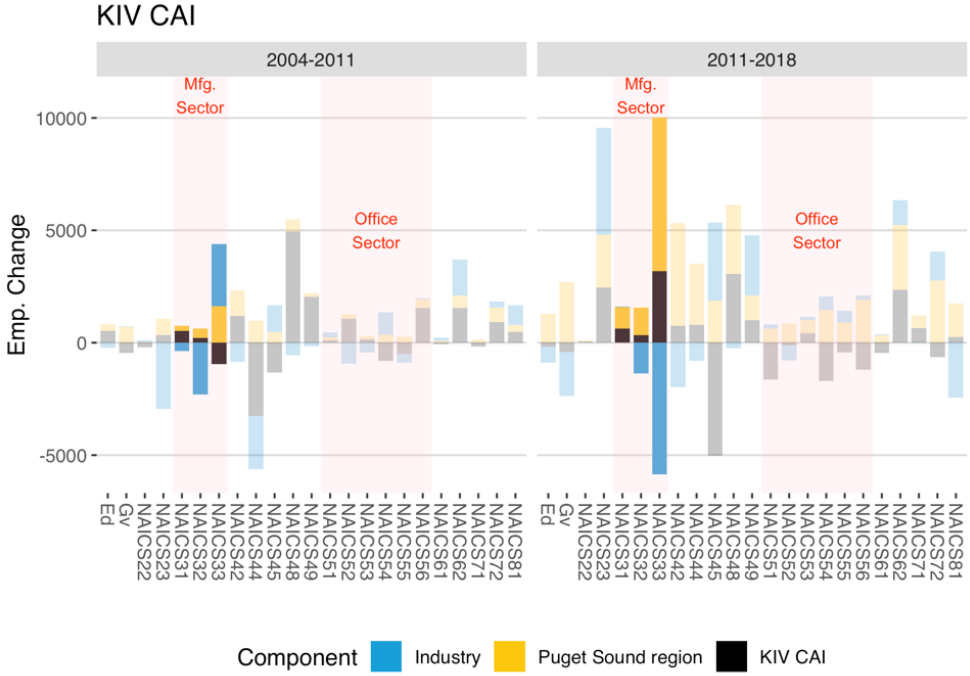
Employment Shift Analysis

A shift-share analysis is a method for breaking down employment changes by industry into three broad components: local area conditions, industry-level trends, and region-wide shifts. The three components can have either a negative or positive effect on the actual change in employment numbers, based on their relative magnitude. This approach can help identify local area-specific competitive advantages; it informs policymakers and economic development professionals of the industries growing at a higher rate locally compared to regionwide growth so they might target those businesses for economic development and policy support. A competitive advantage in the context of a shift-share analysis indicates market preference and the desirability of an area for business and employment growth for specific industries. Factors such as agglomeration, qualified labor markets, and access to infrastructure contribute to competitive advantages. ECONorthwest conducted a shift-share analysis for three geographies to identify any sub-geography-specific comparative advantages for employment growth; the Kent Industrial Valley, Kent Industrial Lands, and the Kent Manufacturing/Industrial Center (MIC).

This analysis found that the Kent MIC has the strongest local area competitive advantage for manufacturing businesses, the Kent Industrial Lands geography has a strong local area competitive advantage for transportation and warehousing businesses, and the Kent Industrial Valley has a local area competitive advantage for both manufacturing and transportation and distribution businesses.

The Kent Industrial Valley shift-share analysis (Exhibit 5) indicates that there is local area strength and competitive advantage in the manufacturing industries. The Kent Industrial Valley does not have a competitive advantage in traditional office-based employment industries. The Kent Industrial Valley also has a moderate competitive advantage for wholesale and transportation employment.

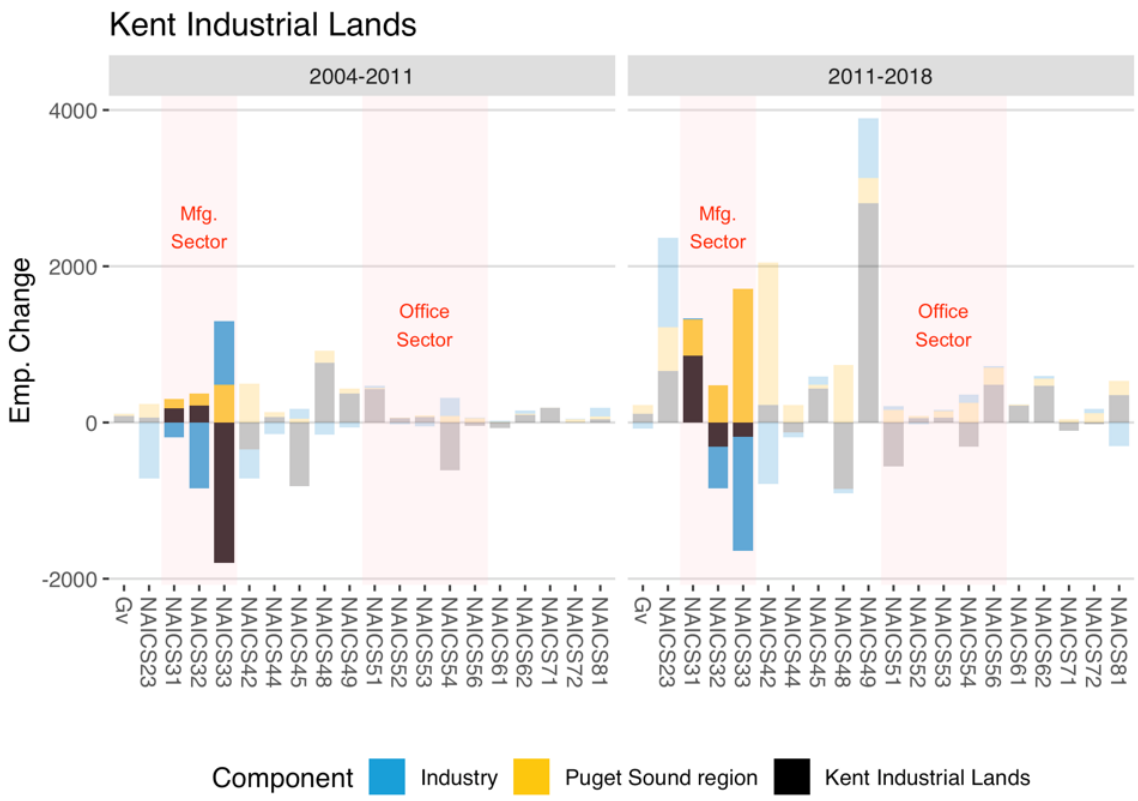
Exhibit 5. Shift Share of Major Industry Employment – Kent Industrial Valley, 2004-2018



Source: PSRC Covered Employment

The Kent Industrial Lands shift-share analysis (Exhibit 6) indicates that there is a small local competitive advantage in the manufacturing industries. The Kent Industrial Lands area does not have a competitive advantage in traditional office-based employment industries. The Kent Industrial Valley also has a strong competitive advantage for wholesale and transportation employment.

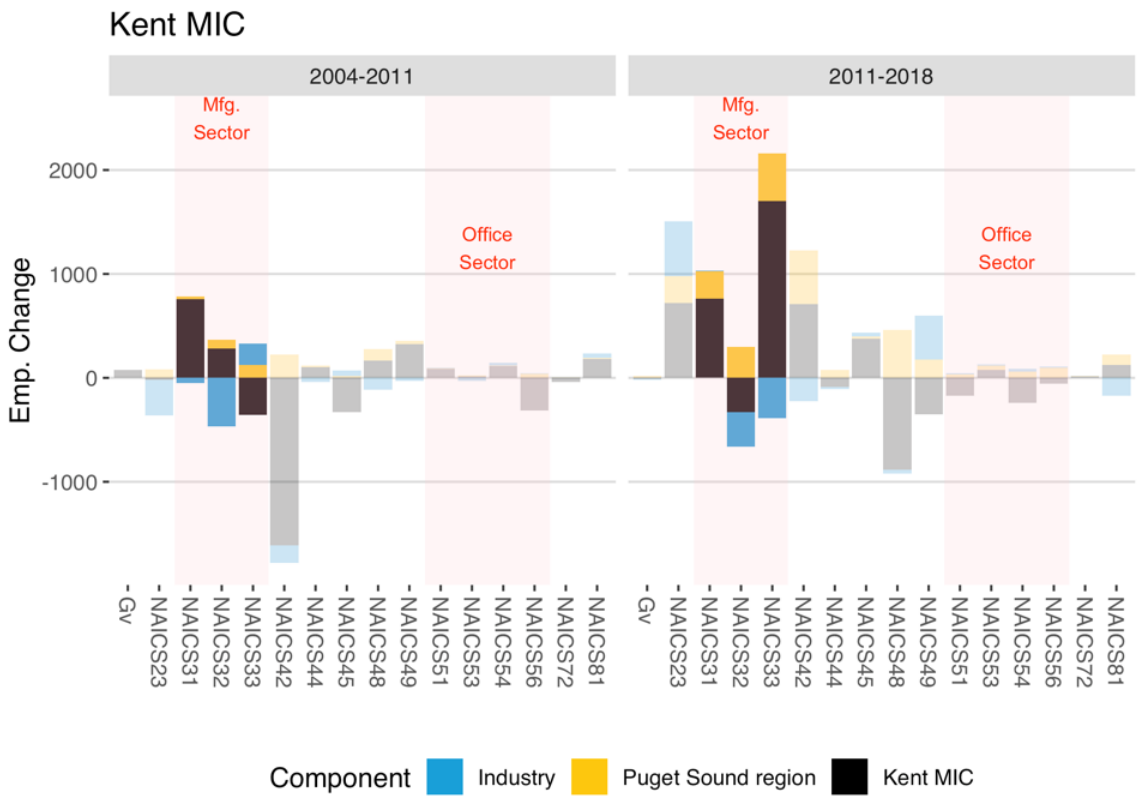
Exhibit 6. Shift Share of Major Industry Employment – Kent Industrial Lands, 2004-2018



Source: PSRC Covered Employment

The Kent Manufacturing/Industrial Center (MIC) shift-share analysis (Exhibit 7) indicates that there is a strong local area competitive advantage in the manufacturing industries. The Kent MIC has does not have competitive advantage in traditional office-based employment industries. The Kent MIC does not have a competitive advantage for warehousing and transportation employment but does have an advantage in wholesale trade.

Exhibit 7. Shift Share of Major Industry Employment – Kent MIC, 2004-2018



Source: PSRC Covered Employment

Industrial Building Inventory

The Kent Industrial Lands area is predominantly large format warehousing with a smaller share of small and medium format industrial buildings. Exhibit 8 shows the share of the total square footage of building area by use. The majority of buildings in the area, 86 percent, are used as distribution or storage warehouses. There is almost 38.7 million square feet of distribution and storage warehouse space in the area (Exhibit 9). Thirteen percent of building square footage in the area is used as manufacturing, flex or industrial engineering space (Exhibit 8). There is almost 5.9 million square feet of manufacturing, flex or industrial engineering space in the area (Exhibit 9).

Exhibit 8. Share of Total Square Feet by Building Use

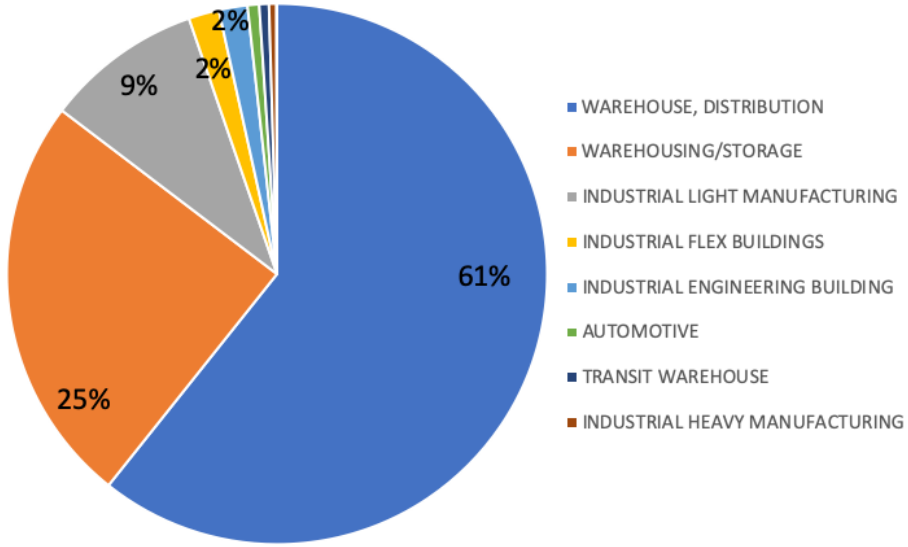
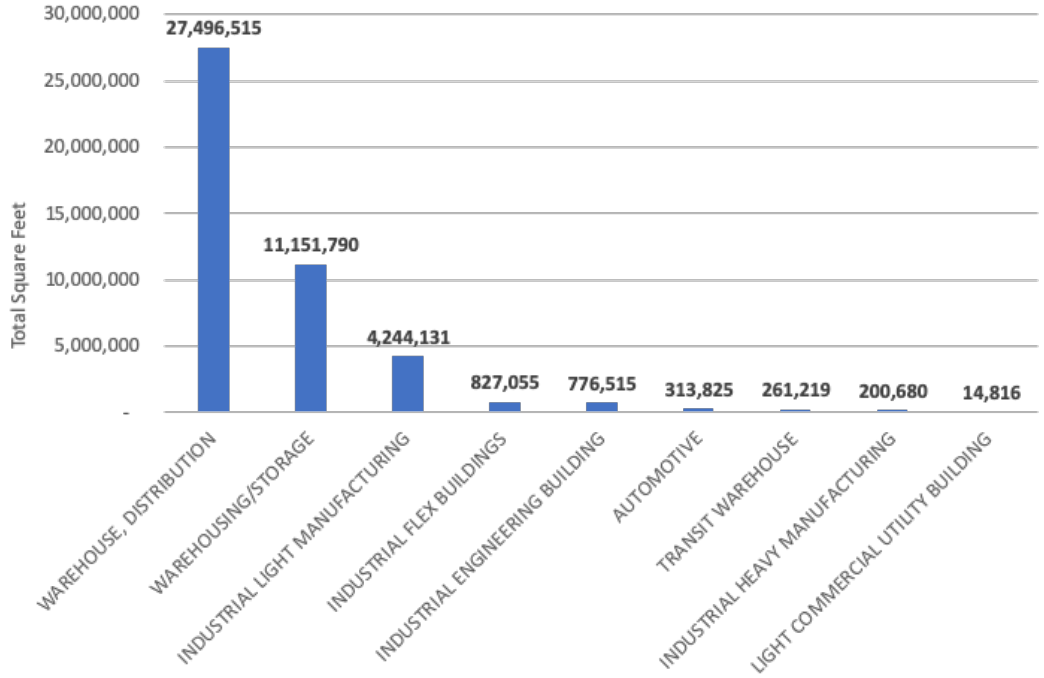
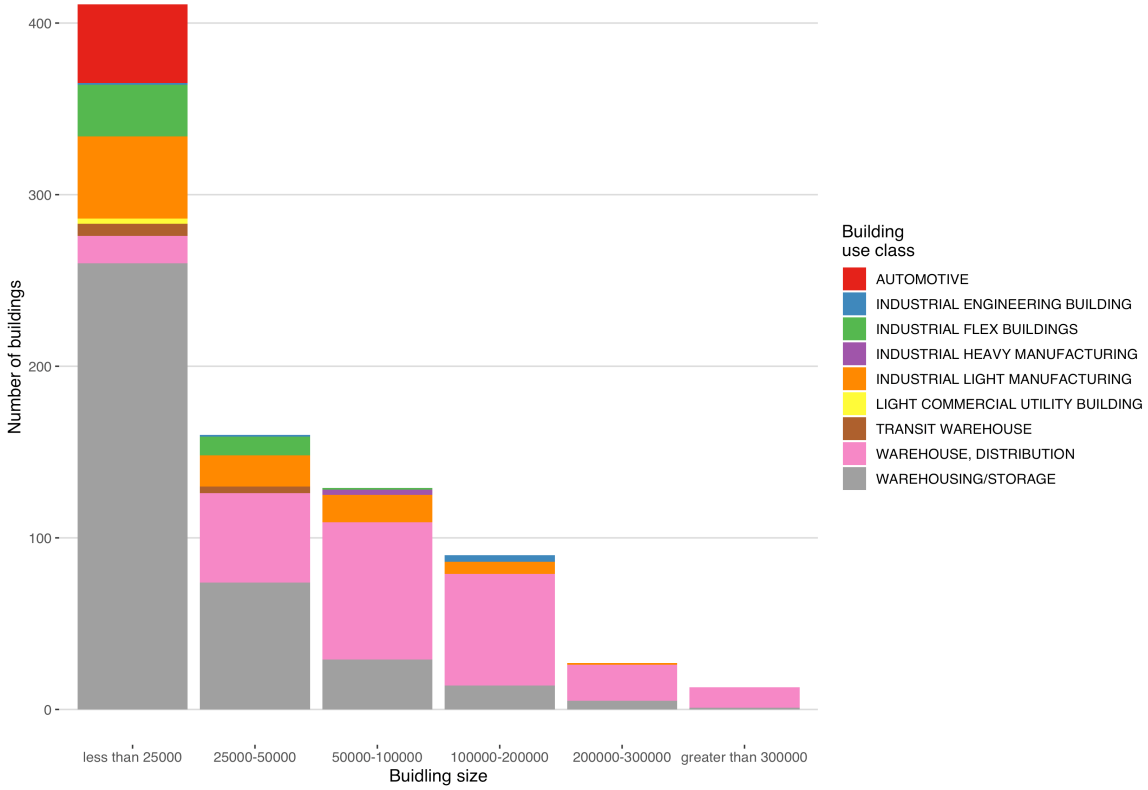


Exhibit 9. Total Square Feet by Building Use



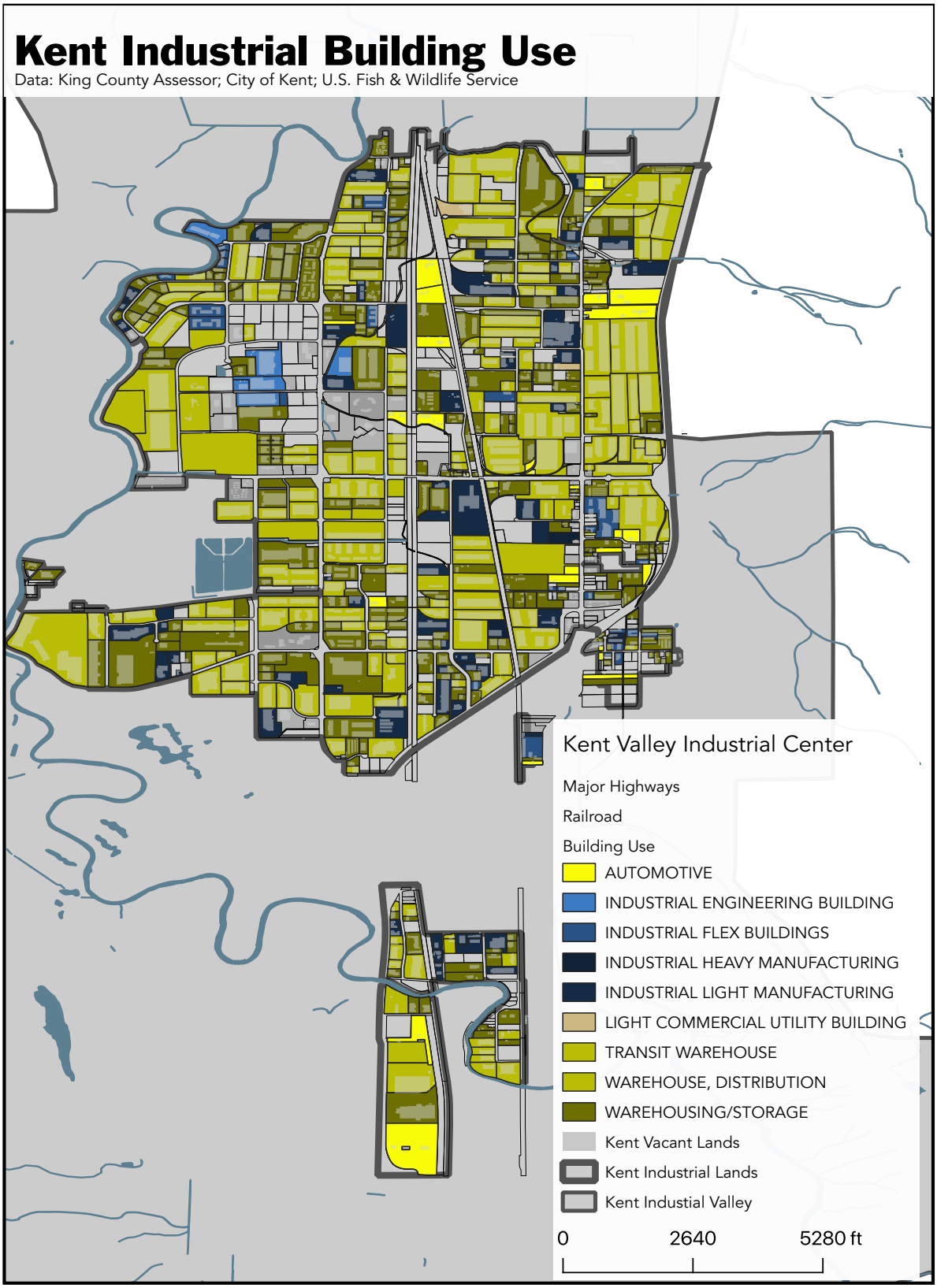
Using recent King County assessor and tax lot data, ECONorthwest analyzed the size and current use of all industrial and employment buildings within the Kent Industrial Lands area. This analysis evaluated only uses in industrial buildings because buildings with industrial uses make up 93 percent of all building uses in the Kent Industrial Lands. Nearly a third of all buildings in the area are small buildings (under 25,000 sq. ft.) with a land use of "warehousing storage". Warehousing storage buildings of *all sizes* make up nearly half of the buildings in the Kent Industrial Lands area. The remaining share of buildings (about 25 percent) are composed of smaller (50,000 sq. ft. or smaller) structures devoted to a mix of manufacturing, automotive, and "industrial flex" uses. The majority of manufacturing uses (about 90 percent) are located in buildings that are 100,000 square feet or smaller.

Exhibit 10. Kent Industrial Buildings by Use and Size



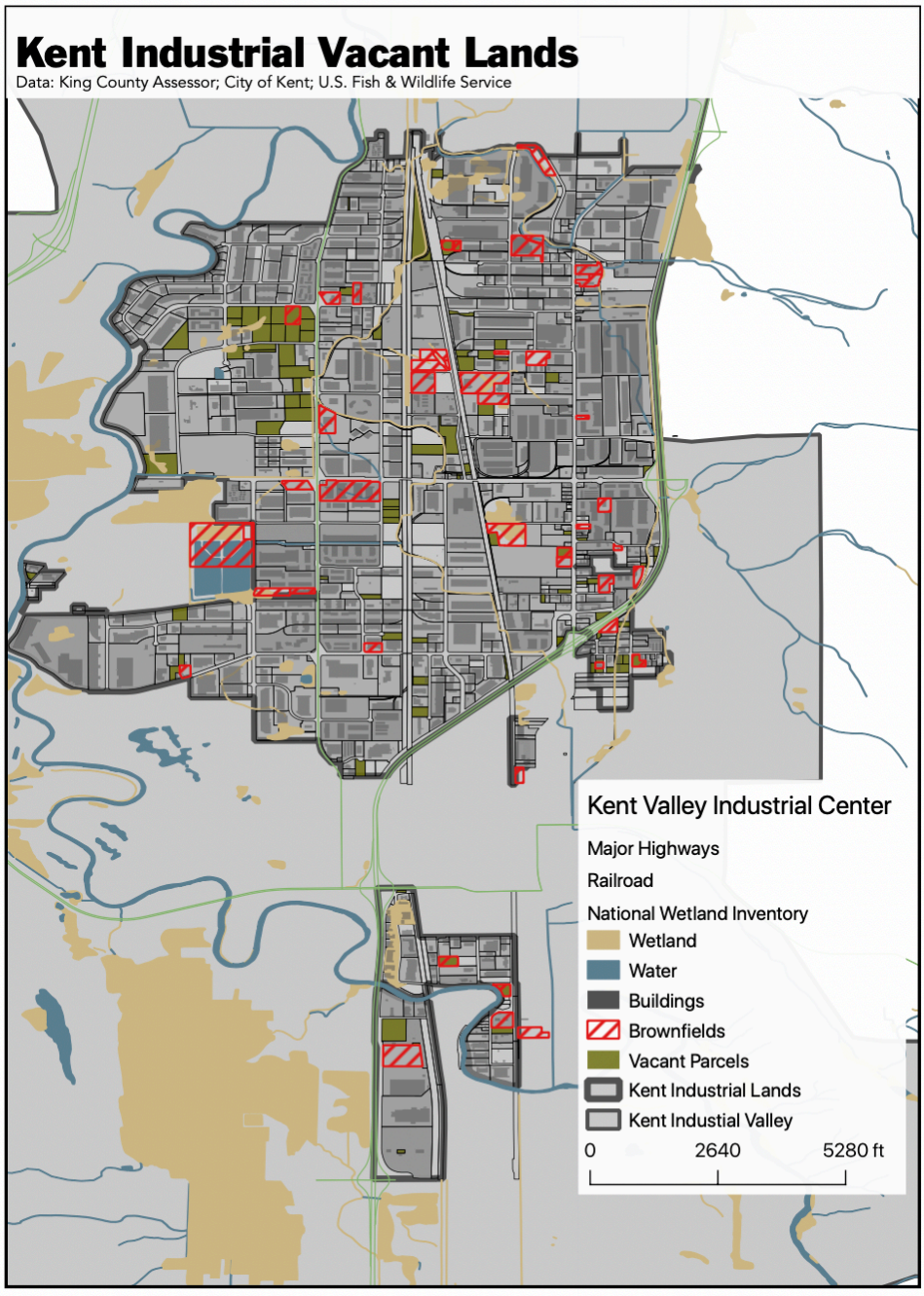
Source: King County

Exhibit 11. Kent Industrial Lands Buildings by Use



There are relatively few vacant developable sites remaining in the Kent Industrial Lands. While there are a number of smaller vacant sites located throughout the area, there are few larger sites with common parcel ownership over five acres throughout the Kent Industrial Lands. Potential redevelopment of sites located throughout the Kent Industrial Lands can be constrained by the presence of "brownfields" which are redevelopment sites that are likely to require environmental remediation. The term "brownfield" refers to real property, the expansion, redevelopment, or reuse of which may be complicated by the presence or potential presence of hazardous substances. Brownfield sites can be challenging for redevelopment due to unknown cleanup costs, liability, and market challenges of industrial to industrial redevelopment.

Exhibit 12. Kent Industrial Lands Vacant Land



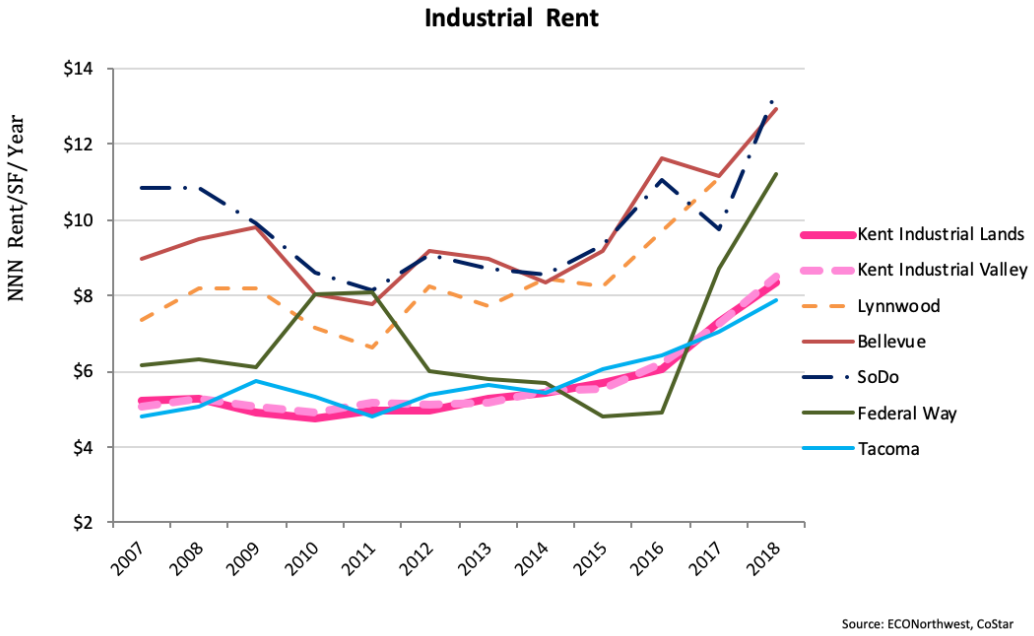
Market Analysis

This section summarizes market trends data for all commercial real estate types. This analysis compares the lease rates and vacancy rates of the Kent Industrial Valley and Kent Industrial Lands area to other employment areas in the region including; Lynnwood, Bellevue, Seattle's South Downtown (SoDo) District, Federal Way, and Tacoma.

Industrial

Industrial rents have increased to a historic high of $8.34/SF/NNN, compared to $5.26 in 2013. Industrial lease rates in the Kent Industrial Lands area have been steadily increasing since 2013 but Kent remains a lower cost area for industrial tenants compared to other areas in the region. These low rents are a competitive advantage for attracting businesses from other parts of the region where costs are increasing at a higher rate. The Kent area is likely to be attractive to price-sensitive tenants that find lower rents in Kent attractive but also need good access to a qualified workforce and the regional transportation network.

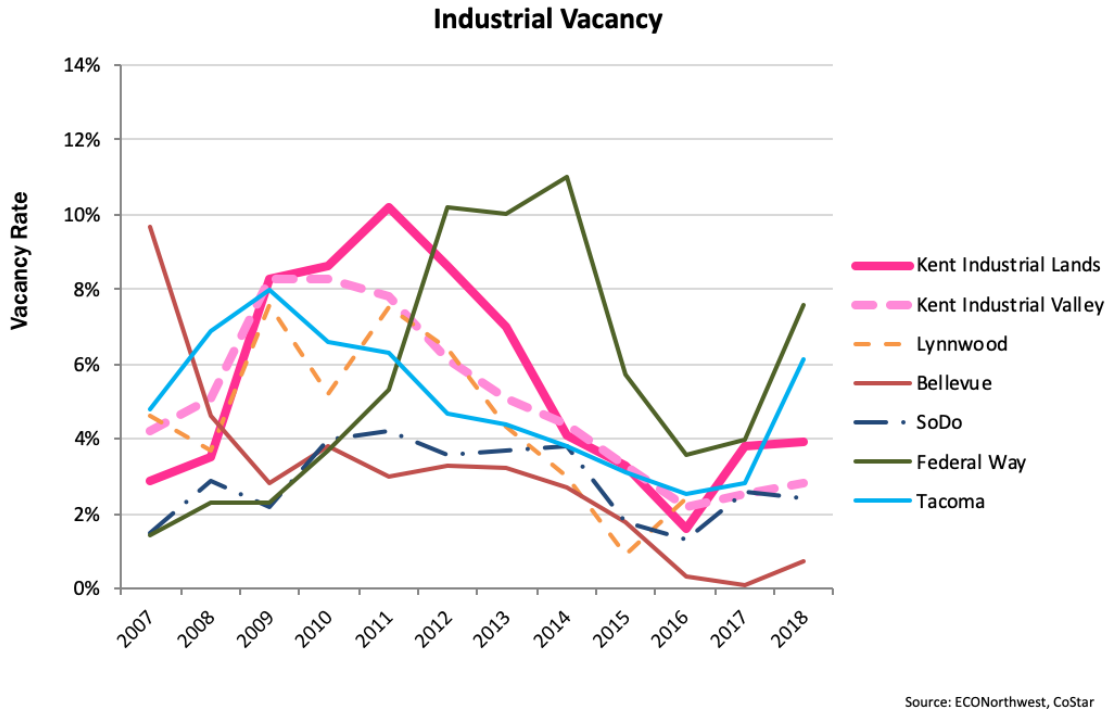
Exhibit 13. Average Industrial NNN Rent per Square Foot, 2007 to 2018, Nominal Dollars



Source: ECONorthwest, CoStar

Since 2009, vacancy rates have fluctuated, but they stabilized from 2014 to 2018 at an average 4 percent. This low vacancy rate signals a strong industrial market within the Kent Industrial Lands which has translated into rent escalations in the last few years. The Kent area has industrial vacancy rates between 2%-4% which indicates a constrained market. It is likely that in the near future investors will start to buy lower rent flex and standard industrial buildings in the area and make value-add improvements to the properties to respond to the high demand and attract different tenant types. New development of speculative industrial buildings will still be challenging due to relatively low achievable rents that cannot currently support new construction. As vacancy remains low, increasing lease rates could help support new construction in the near future. Build-to-suit development for industrial users is likely to dominate the new construction market in the near future.

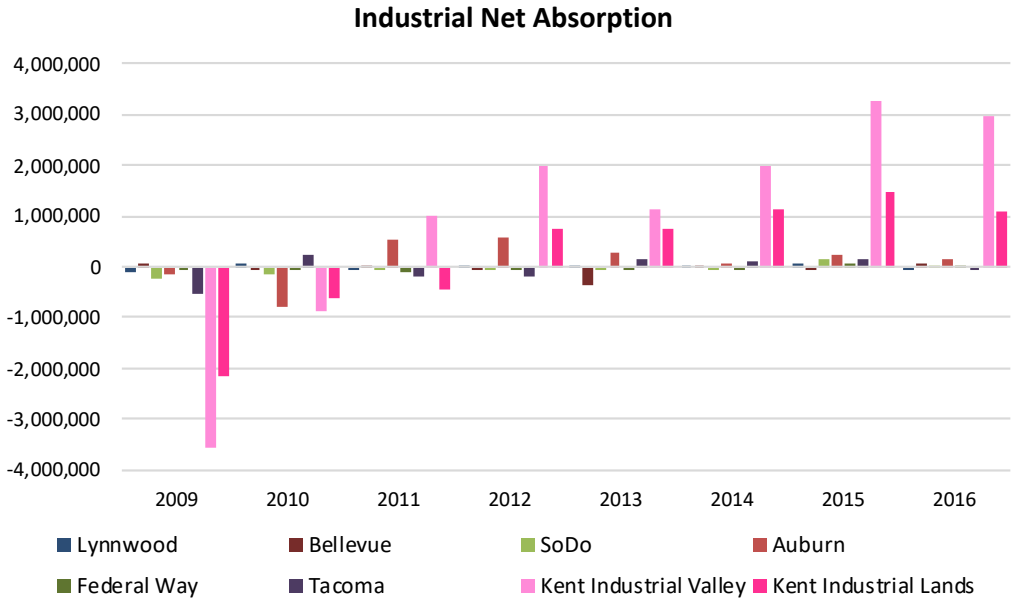
Exhibit 14. Industrial Vacancy Rate, 2007 to 2018



Source: ECONorthwest, CoStar

Net absorption, new leased space, in the Kent Industrial Lands submarket averaged about 785,000 square feet annually between 2011 and 2016, with significant deliveries of newly constructed industrial space totaling more than 4.5 million square feet in this same time period. Increasingly low vacancy rates over this period of time led to rapid absorption of vacant and newly constructed industrial space.

Exhibit 15. Industrial Net Absorption Square Foot, 2009 to 2016



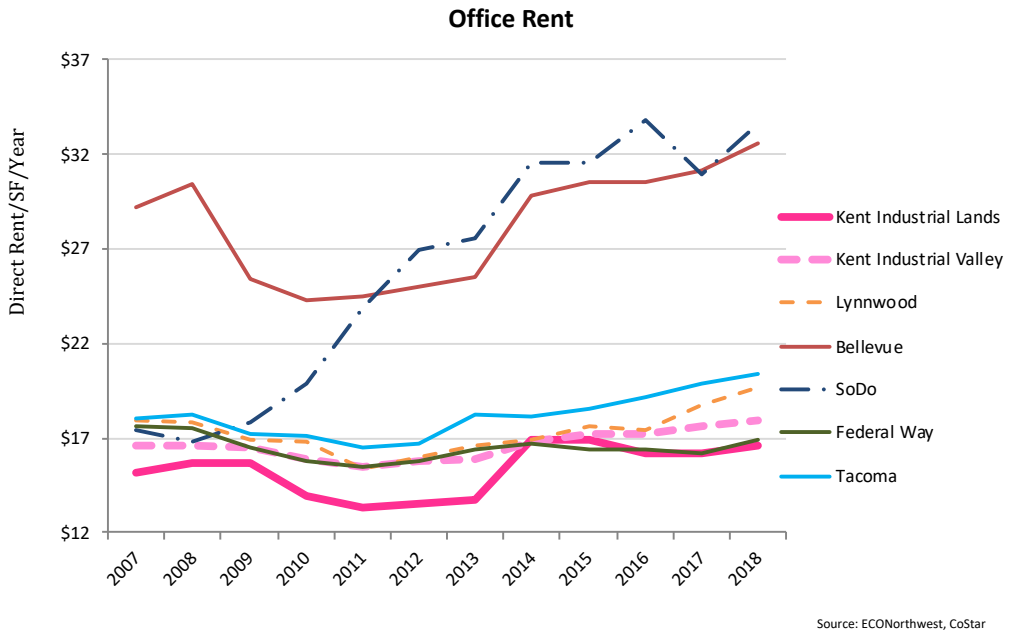
Source: CoStar

Office

Office rents have surpassed pre-recession levels in the Kent Industrial Lands– hitting a new all-time high of $16.59/NNN per square foot in 2018 compared to $13.78 in 2013. Office rents are the lowest in the Kent Industrial Lands submarket relative to comparable submarkets. Comparatively low office rents in Kent are primarily due to the higher share of Class B and Class C office space and limited new construction office space in the last two development cycles. Class B office space buildings compete for a wide range of users with rents in the average range for the area and are usually 10-20 years old. Class C buildings are generally older buildings that compete for tenants requiring functional space at rents below the average for the area.

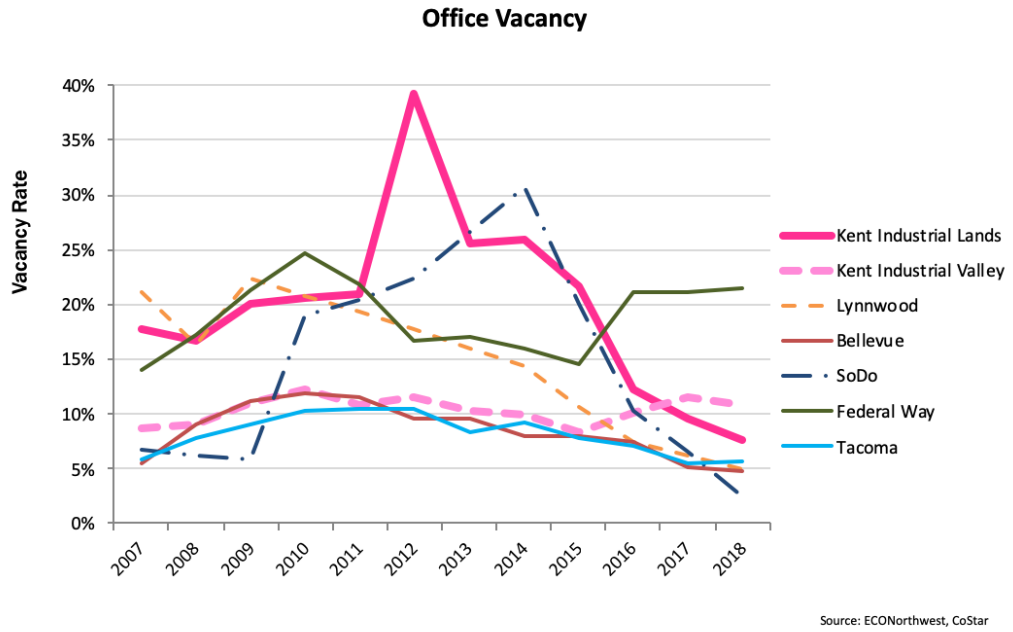
Similar to the industrial market, value driven office tenants are likely to be attracted to the Kent area as office rents have risen quickly in markets closer to Seattle. Current rents do not support new construction of office space in the immediate future. Achievable office rents would need to increase closer to $30/SF/NNN for new speculative office development to occur. Office rents in the SoDo and Bellevue area are more than double when compared to the rest of the region. Looking closer at office rents in the region, the Kent Industrial Lands submarket has similar office market conditions comparable to Lynnwood, Auburn, Renton, Federal Way, and Tacoma.

Exhibit 16. Average Office NNN Rent per Square Foot, 2007 to 2018, Nominal Dollars



The Kent Industrial Valley's office vacancy rate trend has been declining steadily since 2013. Vacancy rates have dropped from 25.6 percent in 2013 to 7.6 percent in 2018, signaling a stronger market in the Kent Industrial Lands area for office space. The 2018 vacancy rate of 7.6 percent is the lowest office vacancy rate observed in the last fifteen years. Other parts of the region are also experiencing a strong office market with low vacancy rates, especially in Bellevue, Lynnwood, SoDo, and Tacoma. Decreasing vacancy rates and increasing lease rates would indicate that investors are likely to start purchasing and renovating older office buildings to command higher rents. These value-add office building renovations are likely to be targeted to attract office tenants that are willing to pay higher rates for improved amenities.

Exhibit 17. Office Vacancy Rates, 2007 to 2018

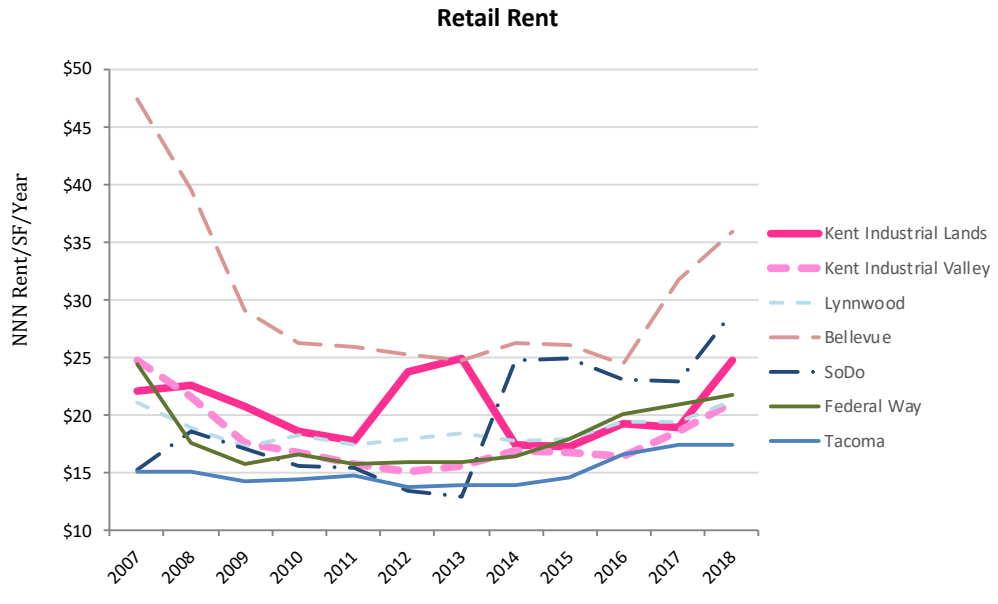


Source: ECONorthwest, CoStar

Retail

Despite annual volatility over the last few years, the Kent Industrial Lands retail lease rate trend has remained relatively flat since 2007 at $24.70 NNN per square foot in 2018. While retail lease rates in the Kent Industrial Lands and Kent Industrial Valley areas have been relatively stable over the last 12 years, achievable lease rates are at or above all other comparison geographies with the exception of Bellevue and Lynnwood. Current retail lease rates around $25/SF/NNN in the Kent Industrial Lands area are consistent with higher demand retail locations in suburban jurisdictions throughout the region.

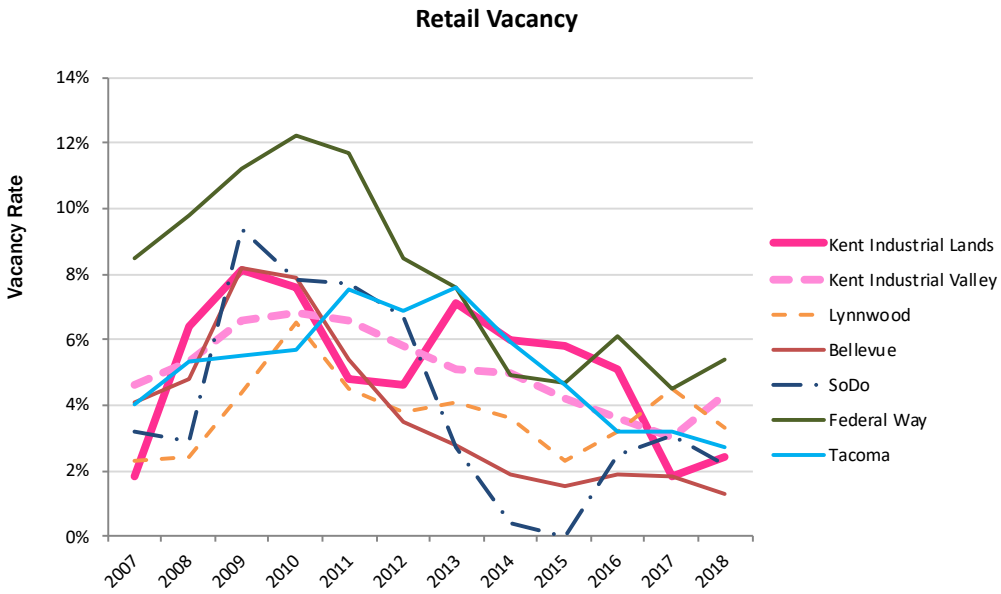
Exhibit 18. Average Retail NNN Rent per Square Foot, 2007 to 2018, Nominal Dollars



Source: ECONorthwest, CoStar

While retail lease rates have remained relatively stable since 2007, vacancy rates have been on a steady decline over the last five years. Vacancy rates between 2% and 4% in the Kent Industrial areas signal a constrained supply of retail space. It is likely that the retail demand is driven by restaurant and food service tenants looking to serve an increasing employee base in the area. The combination of current lease rates and extremely low vacancy indicates that there could be sufficient demand to support additional new construction retail space to serve employees and residents in the area.

Exhibit 19. Retail Vacancy Rates, 2007 to 2018



Source: ECONorthwest, CoStar

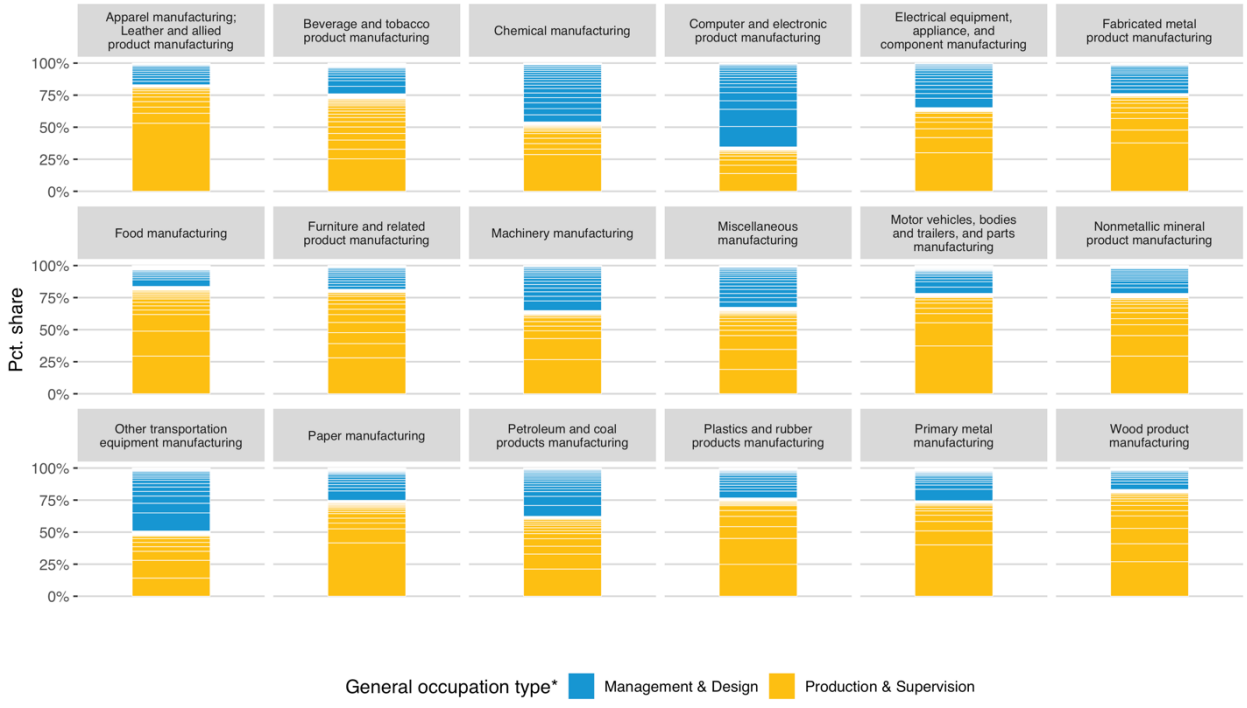
Employee and Worker Characteristics

The majority of manufacturing industries are composed primarily of production-related occupations. Regional Economic Models Inc. (REMI) maintains a dataset of 95 broad occupational titles (based on the federal government's Standard Occupational Classification system, or "SOC") cross-tabulated by 70 industries (based on the North American Industry Classification System, or "NAICS").

When these occupational categories are divided into two broad categories – "production & supervision" (blue-collar) or "management & design" (white-collar) – the data indicates that most manufacturing industries consist mainly of workers engaged in production-based activities (Exhibit 20) such as machine operation, fabrication, or general laborer. Complex electronic and chemical manufacturing industries require more focus on research & design, and as such their shares of managerial and design-related occupations reflect a larger percentage of "white collar" occupations.

The Kent Industrial Valley has a large number of manufacturing businesses with a higher share of workers in "white collar" occupations. This is especially true for the advanced manufacturing and aerospace industries in the Valley. These types of business are more likely to have operational needs that support a larger share of office-based "white collar" workers.

Exhibit 20. Occupation by Industry

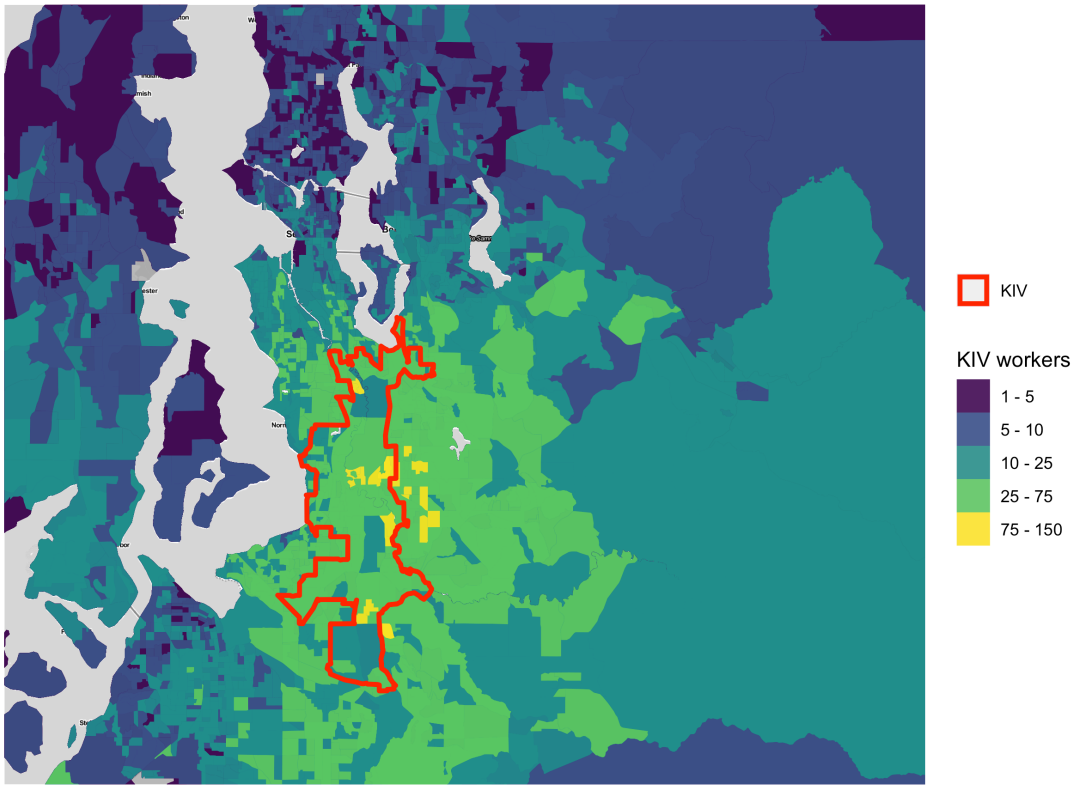


Source: REMI, BLS
*Occupation description contains titles such as 'production', 'worker', 'operator', 'vehicle', or 'fabricator'

Source: REMI, BLS

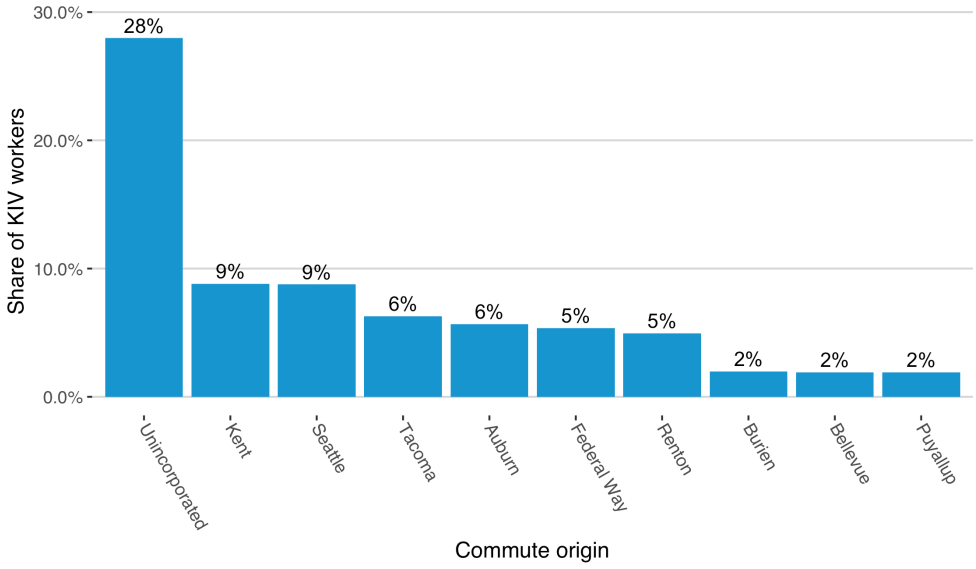
About 20 percent of the Kent Industrial Valley employees reside within the cities of Kent, Auburn and Renton, while 20 percent of employees in the Kent Industrial Valley commute to work from nearby cities in Seattle, Federal Way, and Tacoma. The Kent Industrial Valley also draws a large industrial workforce, about 28 percent, from eastern rural and unincorporated urban areas of the Puget Sound Region (Exhibit 21).

Exhibit 21. Employee Commute Patterns in Kent Industrial Valley



Source: LODES 2017

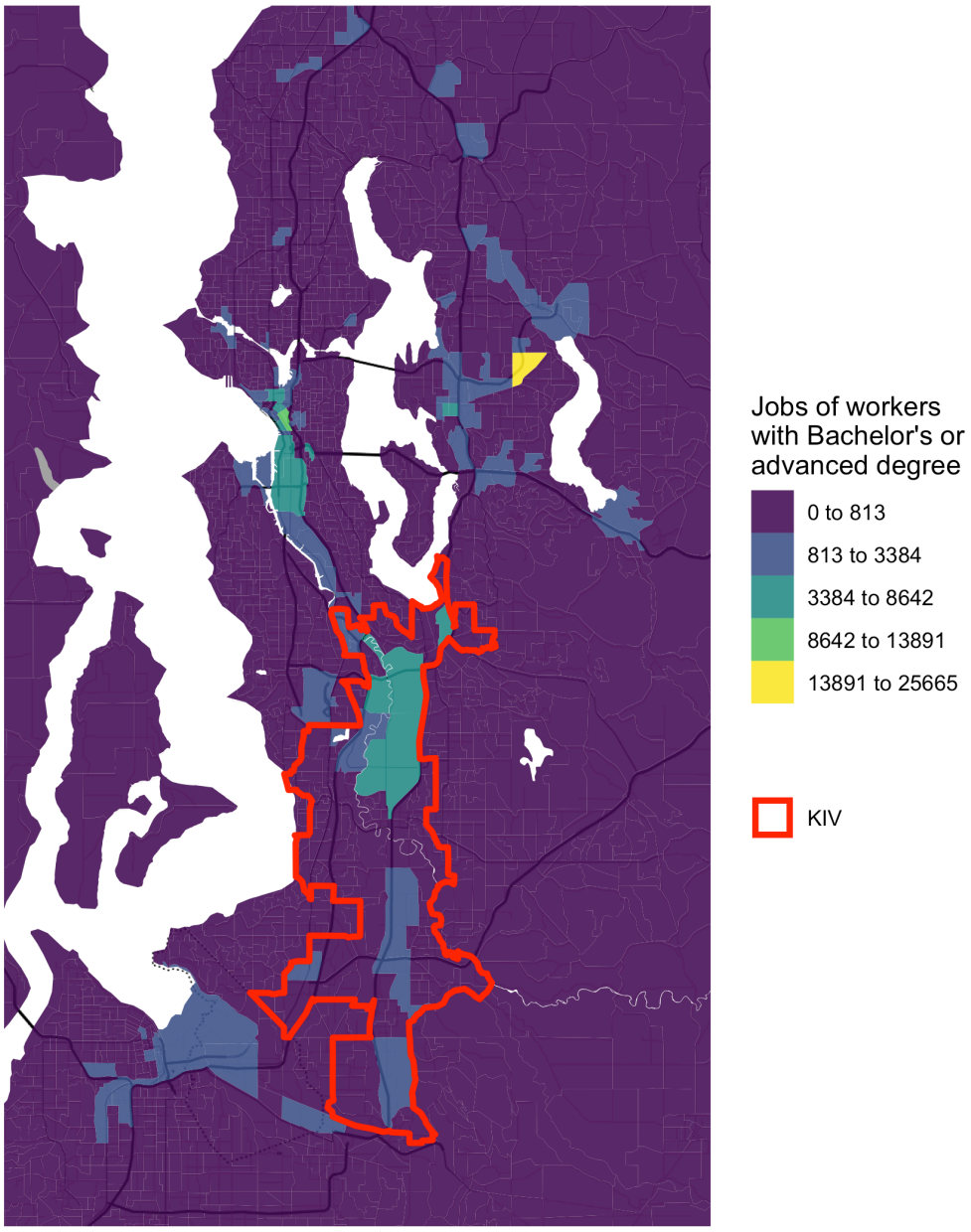
Exhibit 22. Where Kent Industrial Valley Employees Live



Source: LODES 2017

In the Puget Sound region, jobs requiring a bachelor's degree or higher tend to cluster around downtown Seattle and the Bel-Red area in Bellevue which is home to the Microsoft campus. There is also a large number of workers with bachelor's degrees or higher that work throughout the larger Kent Industrial Valley area (Exhibit 23).

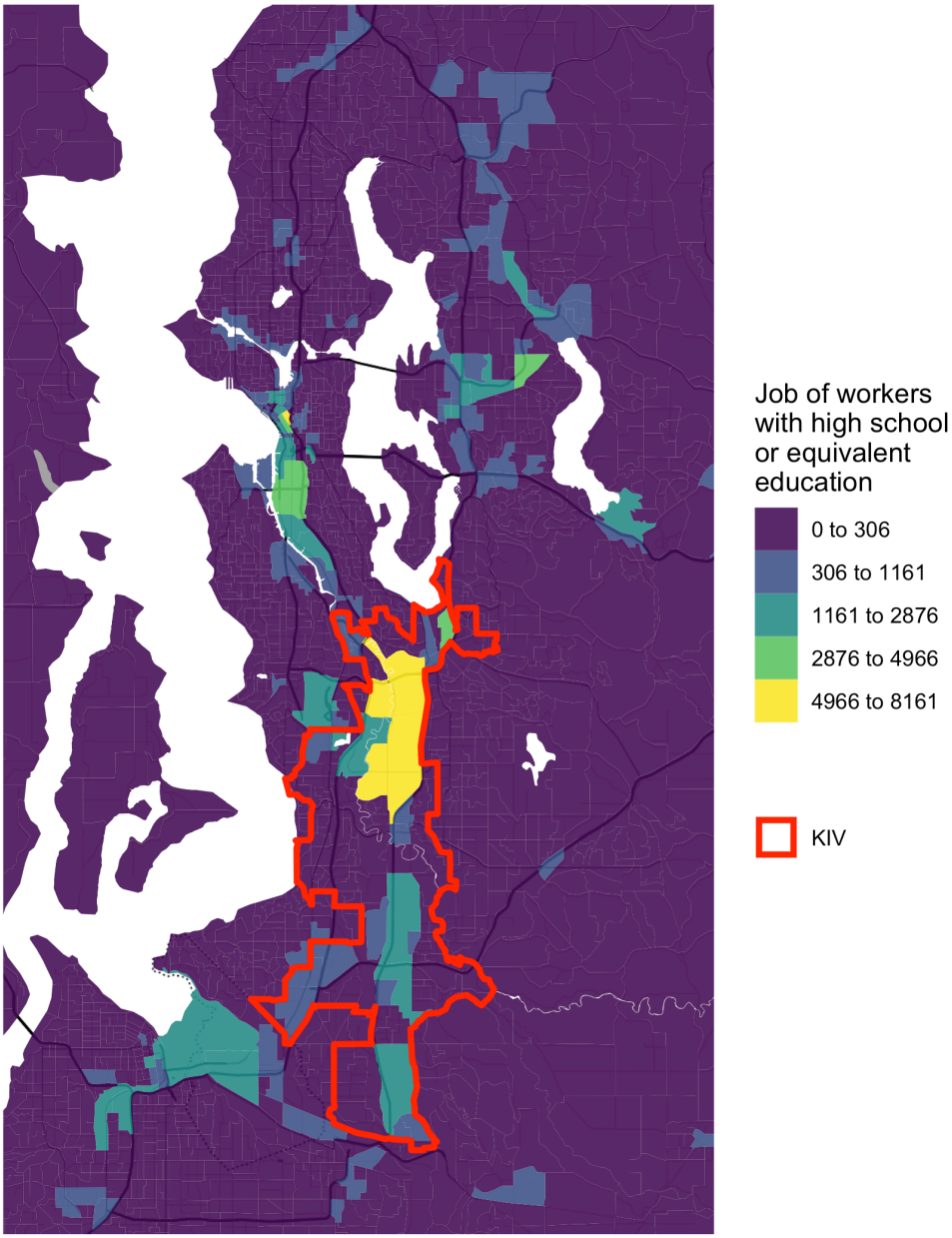
Exhibit 23. Jobs with Employees with a Bachelor's Degree or Higher



Source: LEHD 2015

In the Puget Sound region, and in large regions throughout the country, jobs requiring a high school diploma or less are typically clustered in industrial districts and commercial areas with a high share of service sector employees. Employment in industrial sectors has long provided lower barrier-to-entry middle wage jobs for workers without higher-education degrees. Exhibit 24 indicates that the Kent Industrial Valley has the highest share of workers in jobs with a high school diploma or equivalent of any area in the Puget Sound region. This is due to the large amount of manufacturing, warehousing, and distribution jobs that require only a high school diploma or equivalent, technical training, or specialized skills. The skilled workforce in these industries is a competitive advantage for continued growth and agglomeration of industrial employers in the Kent Industrial Valley.

Exhibit 24. Jobs with Employees with a Diploma or Equivalent



Source: LEHD 2015

Market Area Demographic Snapshot

Businesses looking to locate in a specific employment area are likely to evaluate the population and demographic composition of residents who can easily access the area as the potential workforce pool. This demographic summary provides context for population demographic changes over the last nearly twenty years. The Boeing 18-61 Facility was selected as the central measuring point to summarize demographics for a wide range of the Kent Industrial Lands.

Exhibit 25. Kent Area Demographic Snapshot

	KENT AREA DEMOGRAPHIC PROFILE (Distance measured from Boeing 18-61 Facility)	3 Miles	5 Miles	10 Miles
POPULATION	Total Population 2000	82,819	206,477	567,826
	Total Population 2010	82,601	219,489	609,822
	Total Population 2017	93,877	241,688	673,626
	Total Population 2020*	94,767	247,322	697,057
	Total Population 2025*	99,607	256,381	722,056
	Historic Annual Population Growth 2000-2010	-0.03%	0.61%	0.72%
	Historic Annual Population Growth 2010-2017	1.84%	1.39%	1.43%
	Forecasted Annual Population Growth 2020-2025*	1.00%	0.72%	0.71%
	Median Age	35.45	36.1	36.8
HOUSEHOLDS	Total Households 2000	34,132	81,783	216,057
	Total Households 2010	34,007	86,345	232,129
	Total Households 2017	34,198	88,028	244,158
	Total Households 2020	37,981	97,075	269,460
	Total Households 2025	40,385	102,169	284,524
	Historic Annual Household Growth 2000-2010	-0.04%	0.54%	0.72%
	Historic Annual Household Growth 2010-2017	0.08%	0.28%	0.72%
	Forecasted Annual Household Growth 2020-2025*	1.24%	1.03%	1.09%
INCOME	Median Household Income	$ 61,726	$ 61,958	$ 63,009
	Per capita Income	$ 29,780	$ 29,616	$ 29,509
RACE & ETHNICITY	White Alone	47.5%	50.6%	54.3%
	Black or African American Alone	13.6%	13.0%	11.1%
	American Indian and Alaska Native Alone	1.7%	1.0%	1.0%
	Asian Alone	17.9%	18.3%	17.9%
	Other Race Alone or in Combination	19.4%	17.1%	15.7%
	Hispanic or Latino	17.0%	16.0%	15.2%
EDUCATION	Less Than 9th Grade	6.1%	6.3%	6.4%
	Some High School	7.3%	7.3%	7.2%
	High School Degree	25.8%	25.6%	25.3%
	Some College	23.5%	24.2%	23.0%
	Associates Degree	10.3%	10.1%	9.9%
	Bachelors Degree	19.2%	18.9%	19.8%
	Gradute or Professional Degree	7.8%	7.6%	8.5%
BUSINESS	Total Jobs 2017	127,803	196,479	350,746
	Total Jobs 2020*	141,209	238,391	397,486
	Total Jobs 2025*	149,441	253,093	420,687
	Forecasted Annual Job Growth 2020-2025*	1.1%	1.2%	1.1%

Code Standards

What follows is a review peer cities and their approach and practices, key portions of industrial land use provisions and how they may be deployed in Kent to achieve the desired outcomes and a review of the existing City of Kent industrial use table and development standards and its operating profile in the Valley.

We concluded that the current code has outdated use descriptions, too many categories of uses and limitations on preferred uses aligning with the new vision for the Valley. The existing development standards were outdated and did not align with industrial site characteristics as the industry has significantly evolved. Opportunities exist to realign the development standards to support the new strategic vision of Kent's industrial areas.

Peer City Review

Numerous jurisdictions were investigated for their approach to industrial land use practices, advanced manufacturing goals, community enhancement, development standards and implementation strategies.

Jurisdictions Researched:
Seattle
Renton
Sumner
Puyallup
Fremont, CA - Warm Springs
Pierce County (Fredrickson)
Lacey
Portland, OR
El Segundo - Smoky Hollow
Hesperia, CA
San Jose CA
Snoqualmie - Snoqualmie Business Park
Knoxville, TN

A few key examples emerged as points of reference for the team to develop an approach uniquely tailored to Kent's goals and situation.

Auburn

The City of Auburn has two primarily industrial zones: M-1 Light Industrial and M-2 Heavy Industrial.

The M-1 zone is intended to accommodate a variety of industrial, commercial and limited residential uses. This zoning is intended to provide a high level of flexibility for "non-nuisance" creating light industrial and commercial uses. The code encourages an industrial park like built

environment that focuses more on how the industrial and commercial uses function than the actual type of products made. An essential focus of this zone is quality development that attracts further investment in light industrial and commercial development. The intent is to keep the primary activities within enclosed buildings, thereby preserving higher quality development. This includes severely restricting outdoor operation.

The M-2 or Heavy Industrial Zone allows for a broad range of manufacturing and industrial uses. Higher intensity uses such as manufacturing, fabrication, assembly, and processing of materials are allowed in this zone. The uses in this zone fit a more traditional view of industrial development. While this zone does allow for other uses, those uses must not discourage the use of adjacent sites for heavy industrial, interrupt the continuity of industrial site, or produce traffic that would conflict with the industrial uses.

Renton

Renton has three industrial zones: light, medium and heavy. The Renton industrial categories focus on intensity of uses and where those uses take place. The more the use (including storage and production) is confined within a structure the less intense the use is. In addition, light intensity uses do not generate external emissions such as smoke, odor, noise, vibrations or other nuisances outside the building. Ultimately, the code considers the intensity of the use more than the use itself when decided which category it fall in. The result is that many of the same uses are allowed in each zone, but the intensity of use dictates which zone the development will occur.

The Renton code also identifies the need for compatible or necessary uses to serve the primary uses of the zone.

Summary of zoning classifications

Light industrial - The purpose of this zone is low intensity manufacturing, industrial services, distribution, storage, and technical schools. The allowed use shall be contained within the buildings and materials and equipment are not stored outside. Uses in the Light Industrial should not generate offsite impacts or emissions.

Medium Industrial – The medium industrial zone includes most of the uses allowed in the light industrial and adds warehousing. Medium density zones are appropriate for development that generates some external emissions and requires some outdoor storage, but the impacts are limited to the site. A wide range of commercial and service uses are also permitted.

Heavy Industrial – The heavy industrial zone provides areas for high-intensity industrial activities involving heavy fabrication, processing of raw materials, bulk handling and storage, construction, and heavy transportation. Uses in the heavy industrial zone are allowed to conduct operations in outdoor areas and environmental impacts may affect off-site areas. Therefore, these activities are isolated from sensitive areas. The heavy industrial zone also allows for compatible uses that directly serve the needs for permitted uses.

Pierce County Industrial – Frederickson Sub-area

Pierce County's approach has provided a useful model to tangibly connect a strategic direction to land use language. The approach makes a clear statement regarding employment growth.

Zone classifications are grouped into Urban and Rural and Resource Classifications based on their locations inside or outside of an urban growth boundary. The relevant zoning designations are broken into three categories that are mapped into the community.

EC Employment Center

CE Community Employment

ES Employment Services

a. **Employment Center.** An Employment Center (EC) is a concentration of low to high intensity office parks, manufacturing, other industrial development, or a combination of activities. It may also include commercial development as a part of the center as long as the commercial development is incidental to the employment activities of the center and supports and serves the needs of the workforce.

b. **Community Employment.** The role of the Community Employment (CE) classification is to provide for areas in the communities where low to moderate intensity industrial activities (manufacturing, assembly, warehousing, and industrial services), research activities, and/or office park development may locate.

e. **Employment Service.** The primary focus of the Employment Service (ES) zone is the provision of those goods and services needed on a daily basis by workers within the Employment Center land use designation in an easily identifiable, well-defined location. Light industrial, commercial, and civic uses are permitted.

Pierce County defines uses into nine broad categories rather than 30-50 that Kent and many other codes deploy. These uses are then further constrained by scale of development. This offers a clear example of a very small use framework in contrast to zoning codes with use descriptions in the numerous subcategories.

Exhibit 26: Pierce County-Frederickson Industrial Use Table

Use Categories and Use Types	FREDERICKSON Urban Zone Classifications (18A.22.010)						
	Urban Districts and Other Zones			Urban Employment Centers			
	MUD: Mixed Use District	ROC: Residential/ Office-Civic	PR: Park and Recreation	EC: Employment Center	CE: Community Employment	ES: Employment Service	[Reserved]
	MUD	ROC	PR	EC	CE	ES	
INDUSTRIAL USE CATEGORY: See PCC 18A.33.280 for Description of Industrial Use Categories.							
Basic Manufacturing				P			
Contractor Yards				P			
Food and Related Products	C2			P	P		
Industrial Services and Repair				P	P	C	
Intermediate Manufacturing and Intermediate/Final Assembly	C1,2			P	P	C3	
Off-site Hazardous Waste Treatment and Storage Facilities				C			
Recycling Collection and Processing Facilities				P			
Salvage Yards/Vehicle Storage				C			
Warehousing, Distribution and Freight Movement	C1,2			P1-3;C4	P1-3	C1,2	

Lacey - Light Industrial

Industrial uses in this jurisdiction are very simply organized into "allowed" and "prohibited" uses with an abbreviated approach. Significant restrictions are provided for large scaled developments triggered by site size and building size. Lacey also includes design review and specific industrial design review standards for large scaled developments. These are defined with site area greater than +40 areas or buildings greater than 200,000 sf. Significant language is included for industrial developments adjacent to residentially zoned lots especially focused on truck courts. This is not a significant priority for Kent since residential zones areas are rarely within the Valley.

Allowed

Permitted Uses. Uses allowed within this zone are limited to those necessary for a healthy and vibrant employment zone that promote manufacturing activity and job generation. A use must meet the intent of the zone to be permitted. Types of uses that may be permitted in the light industrial district, subject to satisfying the intent of the zone, may include:

Permitted industrial uses broken into **3 broad categories**

1. Light industrial activities involving the manufacture, assembly, repair, servicing …..
2. Light industrial activities involving the assembly of manufactured …..
3. Other Uses…

Prohibited

Uses other than those identified or described in the code are prohibited, including but not limited to all uses or activities which would require extraordinary equipment, devices or technology for the control of odors, dust, fumes, smoke, noise or other wastes and/or by-products which, if uncontrolled, would contaminate the environment to a degree which would exceed the acceptable limits established by competent and recognized public and quasi-public agencies.

Prohibited uses broadly outlined

- Animal slathering
- Care of animals/livestock
- Storage or use of highly hazardous volatile materials
- Heavy industrial activities

Master Site Plan

> *Lacey also includes a requirement for a higher degree of review for multiple building site plan developments and establishes a Master SPR (Site Plan Review) process. This offers the applicant and the City to review and comment on an overall multi-building and multi-phased project rather than a by-building basis.*

When multiple buildings are located on a single parcel a master site plan shall be required. The master site plan will be reviewed through the site plan review requirements of…

Industrial Design Review Standards

> *Lacey standards call out specific design effects, expectations and components. Modulation, color, campus design concept, attentiveness to public facing facades, minimizing flat walls are addressed. Multiple types of features/design strategies are offered to meet these standards. An attention to building entries and focal points is also included as well as the pedestrian route and experience. Specific standards are provided for size, materials and relationships to other elements including mass-transit.*
>
> *Excerpt from the beginning of this section.*

1. New buildings shall maintain diversity and individuality in style while improving the aesthetic character of their surrounding area…

> *Excerpt from a specific section offering specific design strategies to meet City goals. This offers an array of options for the developer to seek an approach that is best aligned with each project. A few of these are residential in nature and not useful.*

6. To avoid flat walls building modulation shall be used to reduce the mass and bulk of the structure. This can be achieved by utilizing the following techniques:
   a. Building setbacks on upper floor levels;

b. Recessed or clearly defined entryways;

c. Building ornamentation;

d. Varying roof lines, pitches, and shapes;

e. Overhangs, awnings and marquees;

f. Dormers, balconies, porches, staircases;

g. Window and door fenestration;

h. Architectural technique that will have a modulation effect and meet the intent of this section;

i. Landscaping trellises with climbing vegetation or artwork may be utilized for building walls that are located within public viewing;

j. Vegetated roofs;

k. Use of glass and storefront window systems;

l. Use of reveals to create patterning in the concrete;

m. Main entrances to the buildings shall be well defined.

Fremont, CA Industrial

Fremont utilized a very detailed use breakdown and specific innovation approach utilizing an approval category labeled "Z" for Zoning Administrator Permit. This emerged as an option for innovation and a forward-looking approval structure that acknowledges that future uses and issues need process paths which cannot be codified today. Additional uses are defined in alignment with NAICS codes offering connectivity with other measuring/tracking data sets. Fremont's industrial zones are as follows.

I-S Service Industrial
I-T Tech industrial
I-G General industrial

Fremont like others including Kent has a lengthy use table quantified with five modifiers.

"P" Permitted
"C" Conditional Use
"Z" Zoning administrator permit
"A" Accessory
Blank – not permitted

The purpose of "zoning administrator permits" is to provide a simplified process for reviewing land uses which are similar to permitted uses within a zoning district, but

which require review to ensure that the location, site layout, design of structures, and other characteristics of the use are compatible with the zoning district.

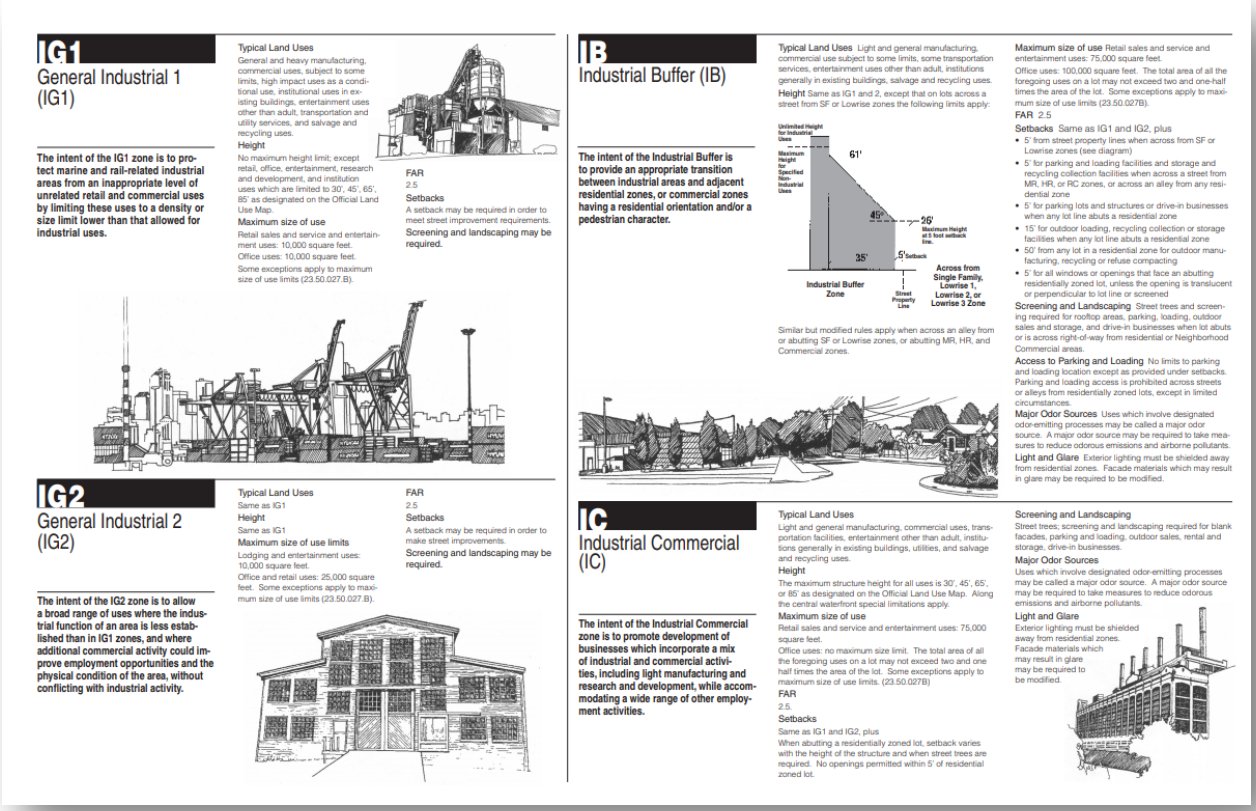
Exhibit 17: Fremont California: Portion of use table

Use	NAICS (2012)	I-S	I-T	I-G	Specific Use Regulations/ Notes
INDUSTRIAL USES AND SERVICES5					
Carpet and upholstery cleaning services[2]	561740	- -	- -	P[5]	
Construction[2] without a corporation yard[1]	23	P[5]	P[5]	P[5]	
Corporation yard-service yard-fleet yard and contractor's storage yard[1] (permanent facilities)		Z[5]	Z[5]	Z[5]	See 18.190.080 for temporary construction yards
Dry cleaning and laundry services[2]	812320	Z[5]	- -	P[5]	
Information[2] (e.g., newspaper and book publishing, software publishing, motion picture and sound recording studios, radio and television broadcasting, and data processing and hosting) excluding telecommunication facilities[1]	51	P[5]	P[5]	P[5]	See miscellaneous section for telecommunication facilities[1]
Mini-warehouses for household goods[1]		Z[5]	Z[5]	Z[5]	18.190.330
Warehousing, general[1] (including e-commerce and e-catalog retailers) excluding mini-warehouses for household goods[1] and warehousing for firearms[1] or refrigerated warehousing and storage[2]	(493120)	P[5]	P[5]	P[5]	18.190.600 and 18.190.610 See retail section for retail uses in connection with a warehouse
Warehousing and storage, firearms[1]		- -	C[5]	C[5]	18.190.160, 18.190.600 and 18.190.610
Warehousing and storage, refrigerated[2]	493120	Z[5]	Z[5]	Z[5]	18.190.600 and 18.190.610

City of Seattle: Industrial General Zones

Seattle, the largest jurisdiction in the state, offers a different structure to industrial zoning. A very small group of categories exist connected to a long use table. Continuity and familiarity for the development community is appropriate to consider with Kent's code refinements/restructure. Seattle also offers a unique approach to change of use and SEPA exemptions within industrial districts. The City established a path for similar industrial uses in project remodels to avoiding triggering a Master Use Permit/SEPA review. This is a tangible process refinement offered only within industrial zoned areas.

Exhibit 28: City of Seattle Industrial Categories



Jurisdictional Comparison and Summary

A summary of development standards from a select few of the jurisdictions were compared to the current Kent standards. The tabulation table below (Exhibit 29) reflects the code language comparisons.

Tabulation of Code Comparisons across AHJ's

Exhibit 29. Code Comparison Summary Table

Item	Sub unit	Sumner M-1	Sumner M-2	Snoqualmie Business Park	Lacey LI-C	Lacey LI	Kent M1	Kent M1-C	Kent M2	Kent M3	Fremont Warm springs	Pierce County - EC Frederickson
Setback (in feet)	Front	20	10	20	15	20	20	20	40	10% of lot depth; max 35	Based on project	35 (N/A)
	Street Side	20	10	20	15	15	15-40 ft (Aggregate width 10% of lot)	15-40 ft (Aggregate width 10% of lot)	10-30 ft (Aggregate width 10% of lot)	10-25 ft (Aggregate width 10% of lot)	Based on project	N/A
	Interior Side	20	0	10	15	15	15-40 ft (Aggregate width 10% of lot)	15-40 ft (Aggregate width 10% of lot)	10-30 ft (Aggregate width 10% of lot)	10-25 ft (Aggregate width 10% of lot)	Based on project	0 (N/A)
	Rear	20	0	10	15	25	0	0	0	0	Based on project	0 (N/A)
	To Residential	50	50	20 (20 SFR; 30 MFR)	25	50	50	50	50	50	Based on project	N/A
		*25 ft. if abutting principal or minor arterial	*25 ft. if abutting principal or minor arterial				200 ft if abutting Green River, Russell Road, or Frager Road	200 ft if abutting Green River, Russell Road, or Frager Road				
Large Bldg Category		N/A	N/A	N/A	N/A	yes 200,000 sf	N/A	N/A	N/A	N/A	N/A	N/A
Height	Base	35	35	60	35	District based	35	35	35	35	75 (District based; 65-240)	60 (N/A)
	With Additional Setback	45	45	N/A	Sites 1-2ac-45ft; >2ac 60 ft	District based	4 stories/ 60 ft.	4 stories/ 60 ft.	4 stories/ 60 ft.	4 stories/ 60 ft.	N/A	Frederickson unlimited *
Stories		N/A	N/A	4	N/A	District based (N/A)	2	2	2	2	Within 1/2 mi of BART: 4-8 Outside 1/2 mi of BART: 3-6	
Landscape Buffer	At Street	25	25	30	8ft Type II	District based (8ft Type II)	20 ft Type III	20 ft Type III	15 ft Type III	10 ft Type III	N/A	If abutting 176th St E, or Canyon Rd. E: 20 ft L3 + Berm
	Side	10 (20)	15 (20)	10 ft Type III	8 ft Type II	District based (8ft Type II)	15 ft Type II	15 ft Type II	10 ft Type II	5 ft Type II	N/A	8 ft L2 (N/A)
	Rear	10	15	10 ft Type III	8 Ft Type II	District based (8ft Type II)	No	No	No	No	N/A	8 ft L2 (N/A)
	Residential District	25	35	20 ft Type I (20' SFR; 30' MFR)	15 ft Type I	35	5 ft Type II 5' H fence	5 ft Type II 5' H fence	5 ft Type II 5' H fence	5 ft Type II 5' H fence	N/A	20 ft L3 + Berm

Item	Sub unit	Sumner M-1	Sumner M-2	Snoqualmie Business Park	Lacey LI-C	Lacey LI	Kent M1	Kent M1-C	Kent M2	Kent M3	Fremont Warm springs	Pierce County - EC Frederickson
	At Bldg. Perimeter	6' W	6' W	No	No	No	No	No	No	No	N/A	N/A
	Fence	No	No	No	Yes if Type I	No	No	No	No	No	No	No
	Berm	4' H 12' W	4' H 12' W	No		No	36" min | 42" max	36" min | 42" max	30" min	20" min	N/A	4 ft min
Bldg Coverage		70% (N/A)	80% (N/A)	N/A (Max building size 20,000 SF)	Max building size 200,000 SF	40%	60% (N/A)	60% (N/A)	65% (N/A)	N/A	N/A	N/A
Impervious Maximum		10 (70%)	10 (80%)	80%	80%	70%	N/A (60%)	N/A (60%)	n/a (65%)	75%	N/A	85%
Landscape Minimum (Pervious)		10	10	N/A	60% front yard landscaping required	N/A	N/A	N/A	N/A	N/A	N/A	15% native
Min Lot Size		10,000 SF	6,000 SF	N/A	10,000 SF	20,000 SF	1 acre	10,000 SF	20,000 SF	15,000 SF	N/A	N/A
FAR		No	No	0.8	1	No	No	No	No	No	.50 (within 1/2 mi of BART) .35 (outside of 1/2 mi BART)	No
Design Review		Yes	Yes	Yes	Yes	Yes	No	No	No	No	Yes	Yes (N/A)
Design Guidelines		Yes	Yes	Yes	Yes	Yes	No	No	No	No	Yes	Yes (N/A)
Blank Walls		Yes	Yes	Yes	Yes	Yes	No	No	No	No	Yes	Yes (N/A)
Entries		Yes	Yes	Yes	Yes	Yes	No	No	No	No	Yes	Yes (N/A)
Multi-Entries		Yes	Yes	Yes	Yes	Yes	No	No	No	No	Yes	Yes (N/A)
Glazing		Yes	Yes	Yes	Yes	Yes	No	No	No	No	Yes	Yes (N/A)
Pedestrian Amenities		Yes	Yes	Yes	Yes	Yes	No	No	No	No	Yes	Yes
Mechanical Screening		Yes	Yes	Yes	Yes	Yes	No	No	No	No	Yes	Yes
Bike Amenities (Beyond Racks)		No (Yes, parking covering)	No (Yes, parking covering)	Yes inside, outside, and showers	Yes, bollards or 5ft clearance from vehicle parking area; lockers, changing areas, and showers	no (Yes, bollards or 5ft clearance from vehicle parking area; lockers, changing areas, and showers)	No	No	No	No	Yes Showers	No
Open Space		? (No)	? (No)	? (Yes)	Yes	District based (Yes)	No	No	No	No	Yes	Yes

Item	Sub unit	Sumner M-1	Sumner M-2	Snoqualmie Business Park	Lacey LI-C	Lacey LI	Kent M1	Kent M1-C	Kent M2	Kent M3	Fremont Warm springs	Pierce County - EC Frederickson
Modulation - Bldg.		Yes	Yes	Yes	Yes	Yes	No	No	No	No	Yes	Yes (N/A)
Modulation - Roof Line		Yes	Yes	Yes	Yes	Yes	No	No	No	No	Yes	Yes (N/A)
Loading Docks - Not Facing Street		Yes	Yes	Yes	No	Yes (may not face residential property)	No	No	No	No	yes (No)	Yes
LEED Incentives		Yes	Yes	No	No	No	No	No	No	No	No	
Arts Program		No	No	No	No	No	No	No	No	No	Yes	Yes

Design & Site Characteristics

"***Kent is recognized as a thriving economically resilient industrial ecosystem. It is a center for productive business and a healthy desirable, place to work."*** This is the articulated vision statement for Rally the Valley. But what this means and how the built environment plays a role to maintain and enhance this vision is shifting significantly. The following Rally the Valley goals all speak directly or tangentially to the built environment.

Goal #2:
Elevate people's experience of the Valley by introducing visible cues of dynamic business activity and desirable amenities.
Goal #3:
Encourage more business types, uses, and economic activity to complement the City's current strengths as a manufacturing and industrial hub.
Goal #4:
Invest in a public realm that supports people and their activities.

Best in class businesses need to deploy unique and compelling features in the design of their facilities. There are many examples of compelling industrial building and site design features that exist across the Valley as well as across the world. The very tight labor market in the Puget Sound, as well as the implementation of emerging technologies is changing how employers will interface with their employees and vice versa. What employers need to create in the workplace has been significantly impacted in an effort to attract and retain today's knowledge workers. Institutional investors and capital partners are now dictating enhanced design and facility features to their buildings to assure long term value and to create an asset class that can trade multiple times.

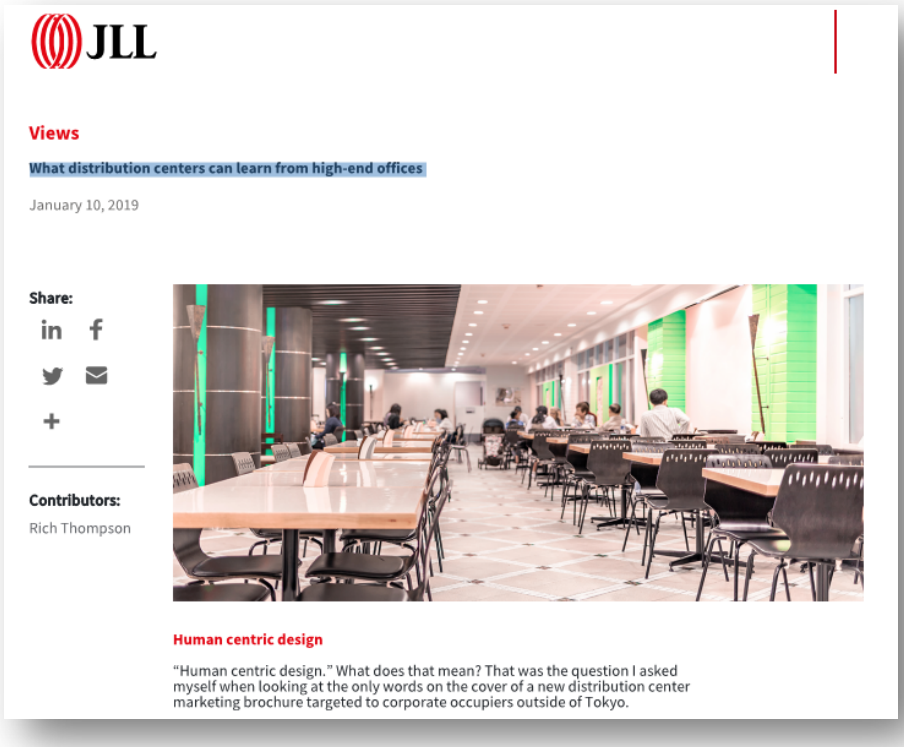
Market Drivers

"Industrial Amenities" in the last few years has emerged in the industrial sector a unique driver which is at times directly connected to design of the workplace and the site. The following exhibit reflects the most common accepted amenities in the industrial sector. These are very

similar to what is seen in the office sector from a decade ago. Amenities in the office sector have taken a significant expansion in intensity and commitment which goes well beyond this list.

Exhibit 31: Top 10 Industrial Amenities to Attract & Retain Labor - Cushman & Wakefield Blog

Exhibit 32: JLL - What distribution centers can learn from high-end offices



JLL

Views

What distribution centers can learn from high-end offices

January 10, 2019

Share:

Contributors:

Rich Thompson

Human centric design

"Human centric design." What does that mean? That was the question I asked myself when looking at the only words on the cover of a new distribution center marketing brochure targeted to corporate occupiers outside of Tokyo.

These amenities are directly connected to the strategic goals for the Valley. With a goal of sustaining and growing the best industrial environment in the State the status quo is not going to be sufficient. To create more opportunities for advanced manufacturing jobs and to foster a rich and vibrant community many new environmental qualities need to be woven into the fabric of Kent. These, and others, are requested and at times demanded by companies and employees. These translate into developer and lender requirements for high quality industrial assets. Institutions and capital partners are now dictating these enhanced requirements to their buildings. This assures an asset class that can trade multiple times. This is a game changer for this sector and combines with the evolution of the industrial workforce to create a nexus for change.

Design & Site Characteristics

In reviewing the elements, factors, characteristics that can be affected by zoning codes and in parallel with this new market driver for industrial amenities we choose and explored deeper the following aspects in his effort to influence and shape results in alignment with Kent's strategic goals.

Hard Aspects
Building Coverage
FAR (Floor Area Ratio)
Building Height
Diversity of Uses
Support small scale makers users

Soft Aspects
Truck Court Orientation
Landscaping/Screening
Building Modulation
Glazing/Entries
Pedestrians + Open Space

The hard aspects

Building Coverage:

- Review and potentially increase allowable coverage to increase density and opportunity. Landscape buffers and associated requirement are maintained to protect adjacencies and key pathways.

FAR (Floor Area Ratio)

- This concept is specifically geared to multi-story buildings on urban sites and rarely used in peer communities. Not recommended for the Kent situation. Incentivize multiple story solutions elsewhere

Building Height

- Review and potentially increase allowable. Over then last decade industrial building heights have increased due to construction changes and users demands. Clear heights inside warehouses have gone from 24 ft to 30 ft to 36 ft to 40 ft. Multi-story warehouse/logistics centers are present in Kent and additional demand is apparent. Increasing the height limit will be managed, in part, by parking requirements.

Diversity of Uses

- One of the keys to creating vibrant business areas is a diversity of uses. In the past, with an overly simplified view, uses were separated rather than integrated. This was most visible in the industrial sector and for some clear and obvious reasons. Some uses are loud, noxious, 24/7 and incompatible with residential. These uses still need to be shielded from some areas but allowing for a rich diversity of uses in the manufacturing and logistics areas will foster the development of employment centers that cater to the full needs of employees and employers. Review and ensure a diversity of appropriate uses are allowed outright in the Valley

Support small scale makers users

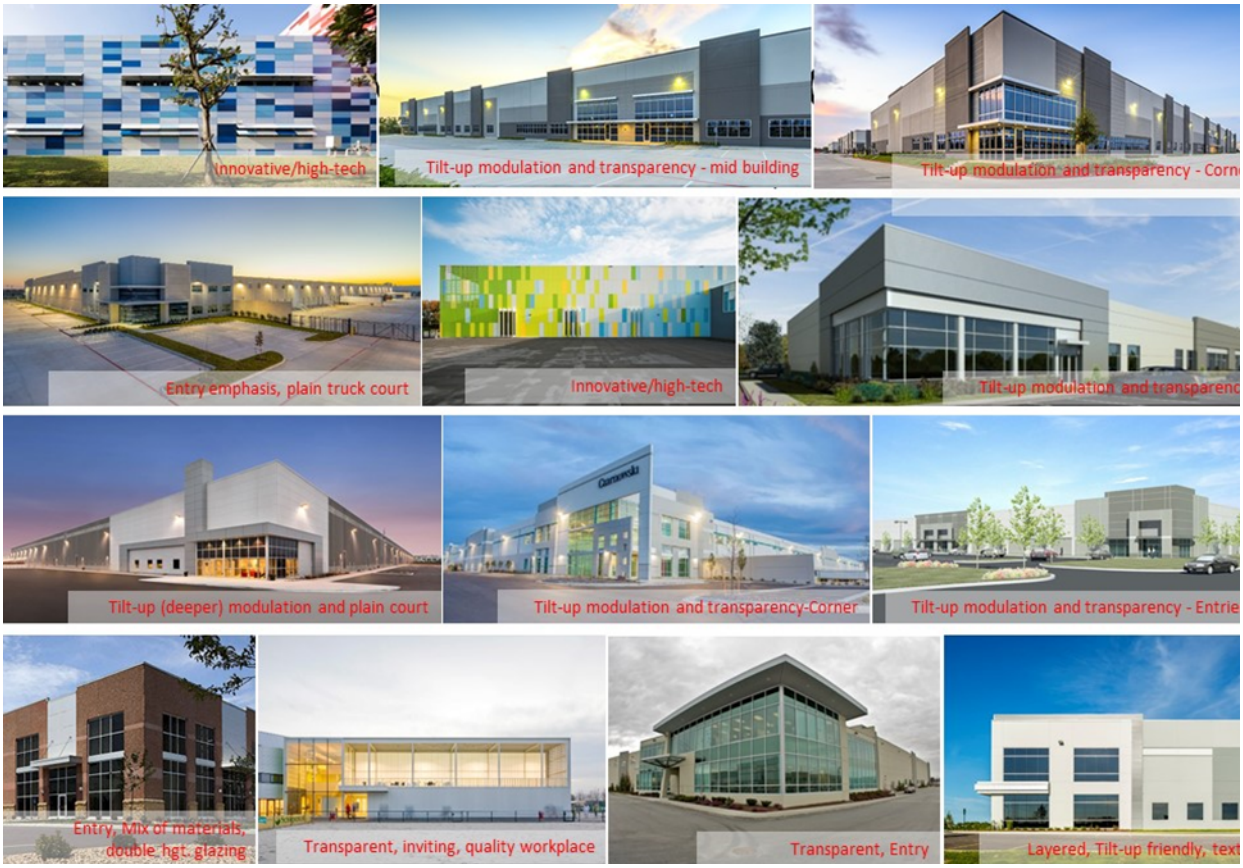
- A use classification of "maker spaces" has emerged as a vital segment of the industrial and business community. The Valley has a significant quantity of industrial building stock that is very well suited for this use. These uses often directly foster or are

connecting to other large-scale employers in communities. This is strongly apparent in other communities across the country where specific districts are targeted as "maker space zones" in an effort to directly support innovation in their communities. Increasing the ease of development or redevelopment of sites for these uses is an important sub-goal in the Valley.

Presecent Examples

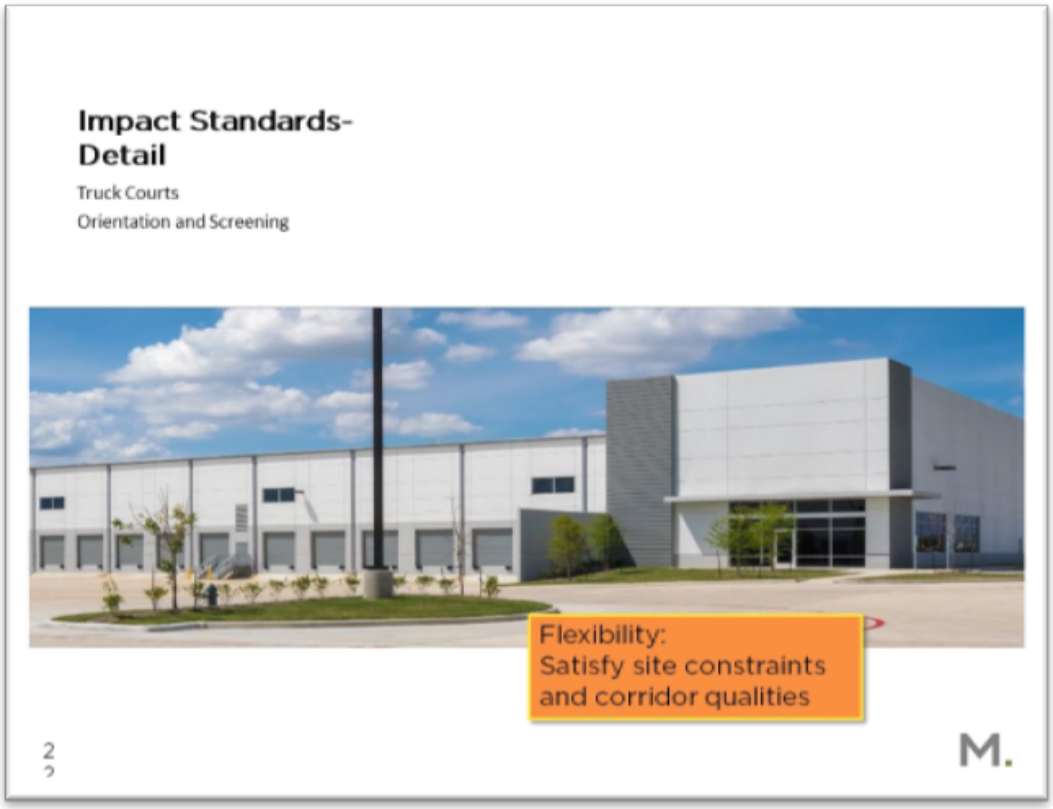
The images below highlight many of the key aspects identified that are important qualities the new Kent zoning and development standards will need to take into consideration.

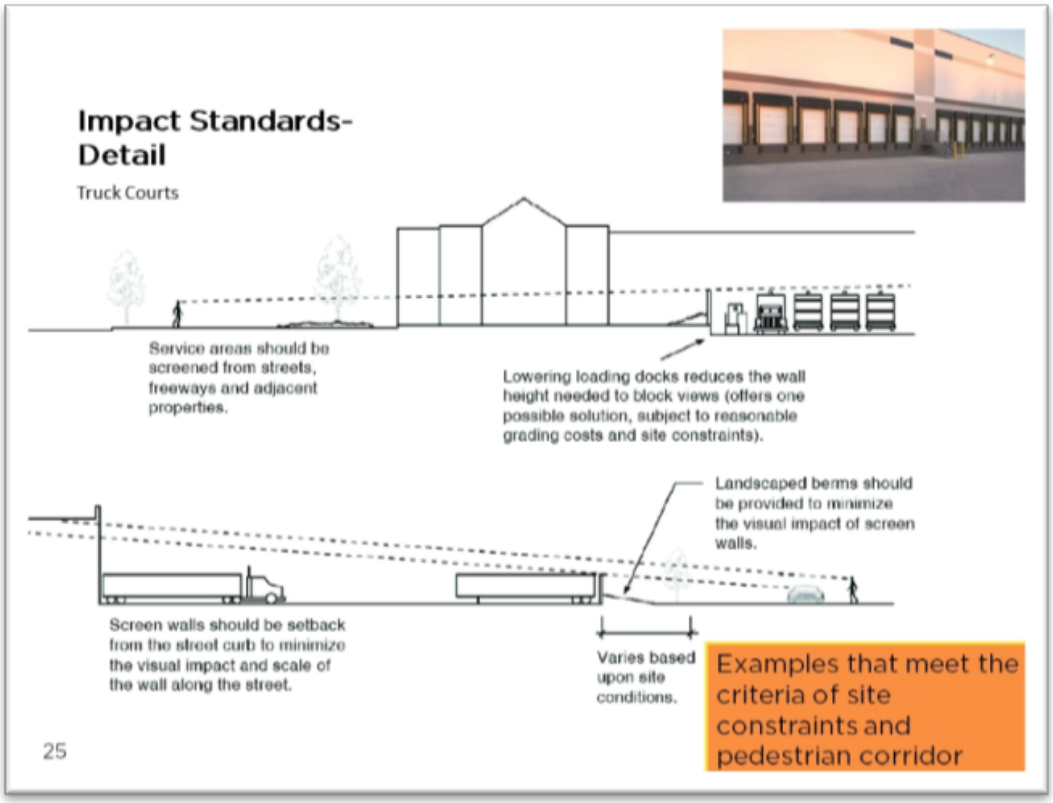
Exhibit 33. Industrial Development Standards and Design Qualities



The following nine images highlight some key site impact standards to be considered in the new development code.

Truck Courts





Unique to industrial developments and impactful in the Valley today are logistics/warehouse buildings and their truck courts for semi-truck storing, loading and maneuvering. These are characterized by large expanses of paving, long buildings ranging from 100 to 2,000 feet long with 10-200 loading dock doors. These can be 24/7 operations but rarely with high truck volume during typical peak PM trip periods from 3-7pm. These environments are not environmentally supportive of pedestrian/bike pathways and are typically not placed directly adjacent to retail or residential developments. Zoning codes often address this feature directly by restricting orientation away from or perpendicular to main streets. Shielding truck courts with fencing, landscape screening or berms is often included. Quantity limitation on number of truck docks or size of courts is not often encountered. Current Kent code provides very limited parameters guiding truck courts.

Summary:

To support the strategic goals implementation of strong parameters on truck courts is prudent where pedestrian and bike pathway or key community arterials exist. Orientation, visibility, screening and scale of operation should be included in the parameters. Care should be taken not to disincentivize advanced manufacturing facilities or all logistics operations.

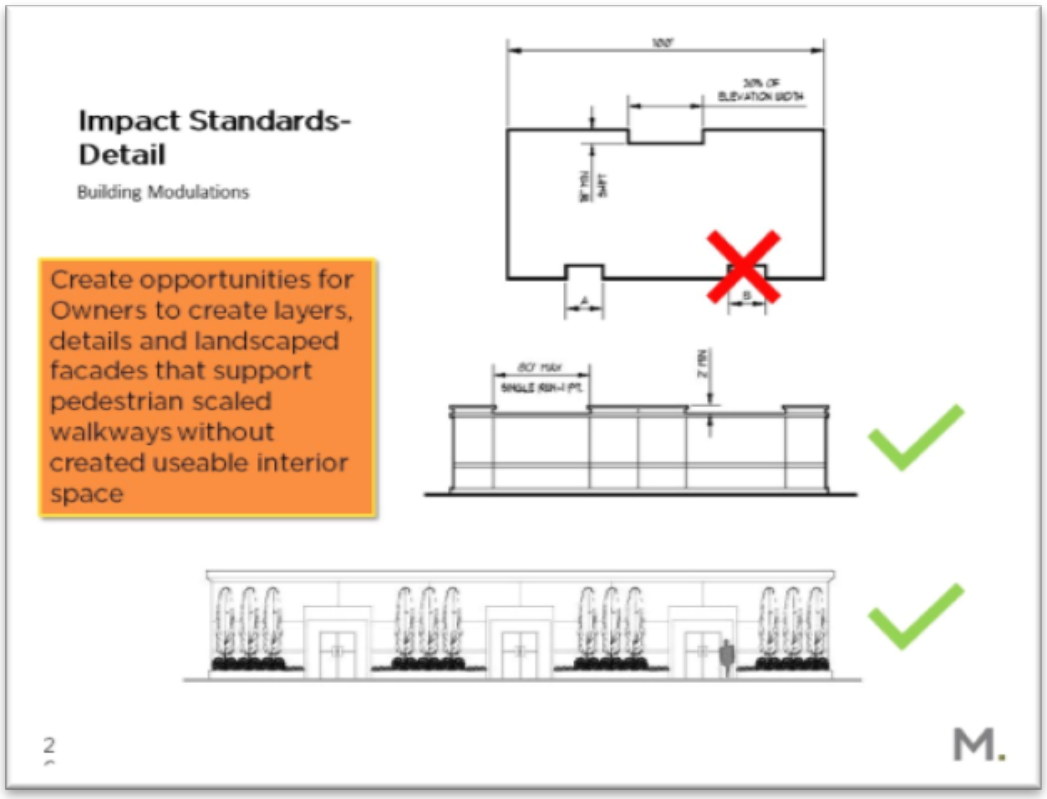
Blank Walls

Blank walls are a key focus in nearly every jurisdiction that engages industrial facilities. This parameter is tied to modulation. Surface area or length of wall without variation are the typical triggers. These can run from 240 sf of blank wall to a 60-foot length of wall. Usually flexibility is provided to the developer to address blank walls. With the inherent nature of large warehouse buildings, in the logistics sector, addressing blanks walls is always triggered in these cities. Unfortunately, these typically often are practically addressed through the application of "wallpapering" of detail onto the building face. These yield little or no value to the interior occupants.

Summary:

To support the strategic goals implementation of moderate parameters on blank walls is prudent where pedestrian and bike pathway or key community arterials exist. Scale should be adjusted to industrial building size, rather than residential, with an overall goal for thick versus thin strategies that are attuned to the functional aspects of a warehouse buildings which yield results for both interior and exterior spaces. Roof line modulation, plan modulation, surface and glazing modulation/articulation as well as enhanced landscape solutions should be allowed/encouraged. Care should be taken not to disincentivize logistics and advanced manufacturing facilities.

Building Modulation



Building Modulation is also a key focus in some jurisdiction that engage industrial facilities. This parameter is often tied to blank walls. Length of wall without modulation is the typical trigger. Modulation parameters where they exist tend to require building offsets, in plan, for a specified distance, like 60 feet. The offset distance is typically defined from 5-15 feet in depth. A length of the offset is also defined. Flexibility is not often provided to the developer to address modulation and the solution becomes prescriptive. Like with blank wall parameters the inherent nature of large warehouse buildings, in the logistics sector, interior modulation that results in typical unused and wasted space. Unfortunately, these typically often are practically addressed through the "tacking on" of details onto the building face or adding "western façade parapets". These yield little or no value to the interior occupants. The exterior spaces that result is an improvement over a 100% flush façade.

Summary:

To support the strategic goals implementation of moderate parameters on wall modulation wall is prudent where pedestrian and bike pathway or key community arterials or features exist. Scale should be adjusted to industrial building size, rather than residential, with an overall goal for compelling, useable strategies that are attuned to the functional aspects of a warehouse buildings which yield results for both interior and exterior spaces. As mentioned with blank facades, roof line modulation, plan modulation, surface and glazing modulation/articulation as well as enhanced landscape solutions should be allowed/encouraged. Provisions for allowing innovative strategies that yield the articulated goals should be encouraged. Care should be taken not to disincentivize logistics and advanced manufacturing facilities.

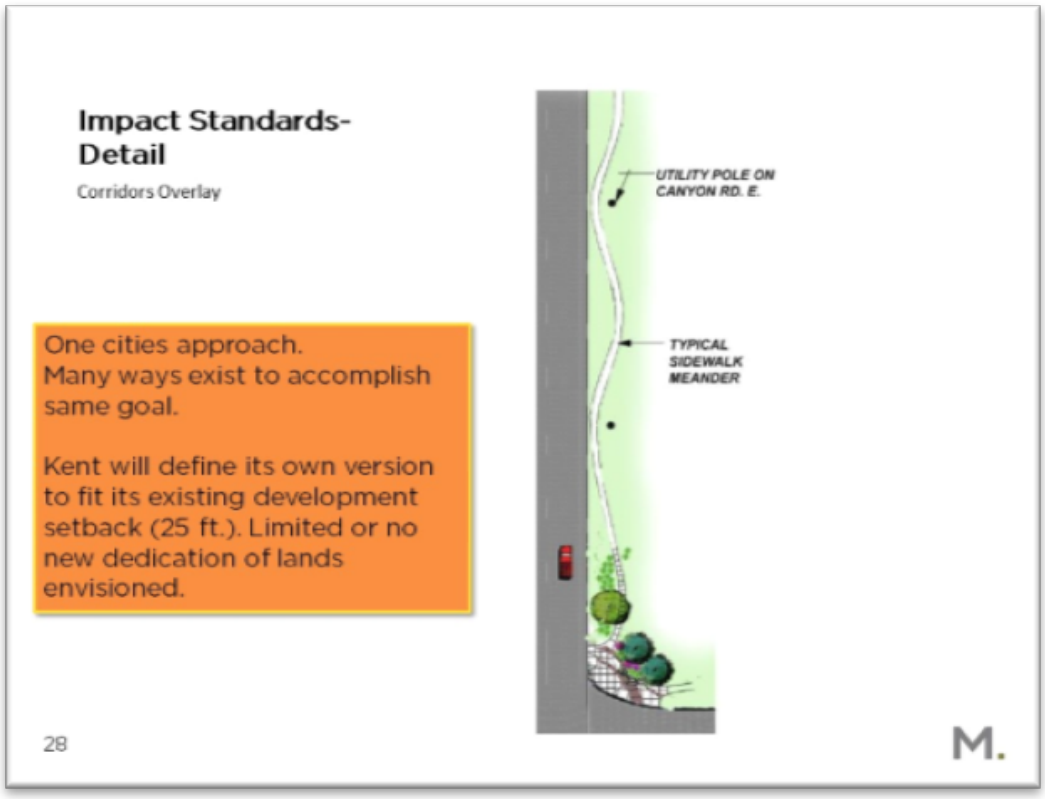
Gateway/Markers

Corridors, gateways, and wayfinding is rarely addressed in the industrial codes in the jurisdictions reviewed. Uniquely the Kent Valley has a system in place already at numerous key intersections. Arrival, entry, community identity and story-telling are elements in creating place. Jurisdictions often have intersections, corridors, pathways, view corridors identified and protected with codes to protect and enhance existing community or regional features. These protect, enhance and focus development and community engagement. The existing Kent intersection program does not seem be a reflect of the goals and spirit of a new Kent. An opportunity exists to enhance the Valley for residents, workers, employers and visitors.

Summary:

To support the strategic goals implementation of an overlay or other identification method that identifies key Valley arterials/collectors, key intersections into or within the Valley and key supporting multi-model features and destinations should be made apparent to the community and reinforced in the Code. Along these arterials, especially those that are intended to support multi-model transportation numerous parameters within the development code should be deployed to enhance these assets. These parameters include; ROW design sections, lighting, signage, landscape, multi-modal separations, allowed adjacent uses and building interfaces and their character along these routes and intersections. Designated corners, like what exists today, should be explored for re-branding/refreshing to become visible and a community asset. Designated intersections not yet in place should be explored for development.

Corridors



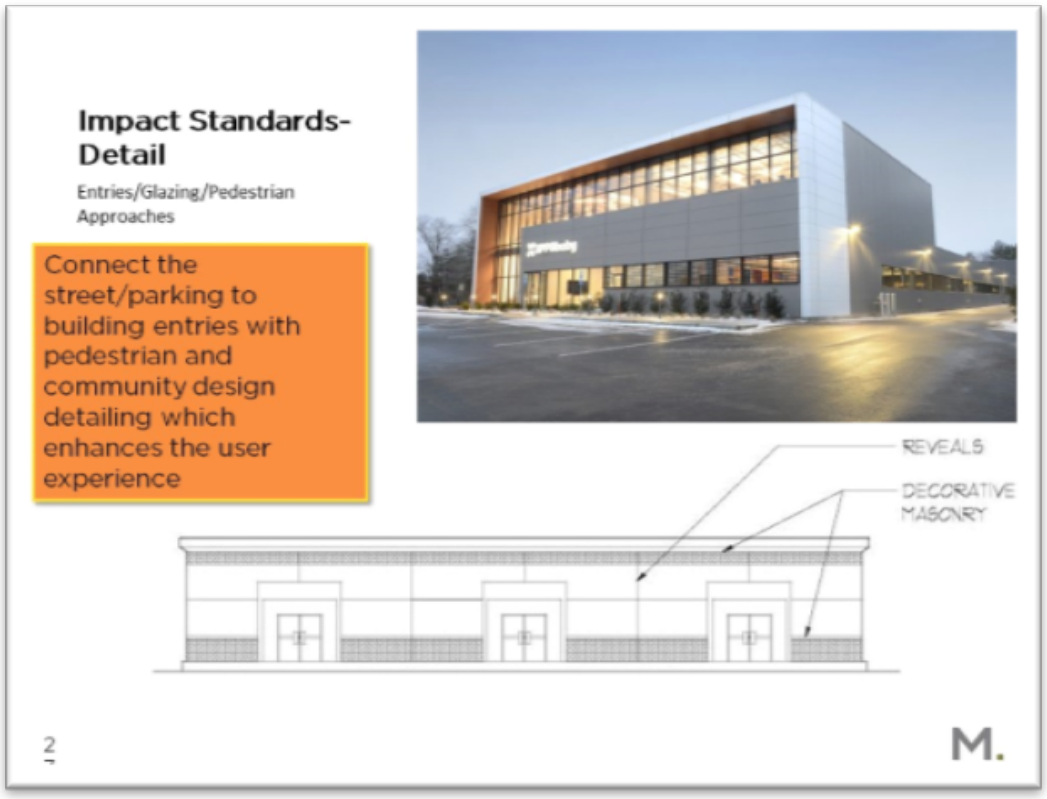
Corridor design parameters are rarely addressed in the industrial codes in the jurisdictions reviewed. This parameter is strongly linked to gateway/wayfinding as discussed above. Jurisdictions often do have corridors specifically identified and protected with codes to protect and enhance existing community or regional features. These tend to be shaped to enhance the path to some other district, like a downtown, and hide/screen the industrial uses.

The existing Kent arterial program has been strongly shaped to address traffic circulation, truck and car, and to overcome barriers, like the railroad lines. Bus and regional train service continue to improve on regional level. Existing multi-modal paths including the Interurban Trail and the Green River Trail are strong, well used and a recognized regional asset. Their integration into a community plan has room to be expanded and made even more vital.

Summary:

To support the strategic goals implementation of parameters to support the development and protection of key; truck, car, bike and pedestrian pathways. Connections between transportation modes need to be activated and commute versus recreational uses leveraged. Public investment aspects to this goal may be needed. Innovative strategies should be explored. Design of the right-of-way is of particular concern to ensure transportation, safety, building and community enhancement are working together. The current arterial design should be reviewed with this appreciation.

Entries/Glazing/Pedestrian Approaches



This parameter brings together three significant elements in building and site design; entries, pedestrian approach and glazing. These might often be split into separate parameters in many codes. These speak directly to the human scaled features and qualities of the building and site design. In traditional industrial facilities these aspects are often secondary features. In the new model for industrial facilities coming from owners, tenants, and investors the quality and scale of these aspects are moving onto the "must have" list. Some jurisdictions layer in heavy handed entry and glazing requirements that are disconnected from industrial building tenant/market requirements. Large truck courts can introduce very difficult to accomplish pedestrian routes. Kent Code is currently silent on these aspects.

Summary:

To support the strategic goals implementation of strong but tailored parameters on entries, glazing and pathways is prudent. These should make sense to the building and to the community connections. Along key arterials the community connections should be addressed first. The route from the street (public way), the key staff and visitor parking areas and to other buildings in a campus need to be conceived as a whole. Staff entries need to be proportionately scaled and higher quality. These should be expanded beyond a solid door in a solid wall. Linkages to remote entries should be addressed. Quantity of entries should be tailored to first and future use profiles. Glazing is one of the most expensive elements on the skin of industrial building yet has the most important quality impacts in both interior and exterior spaces. Industrial buildings have numerous use profiles, many of which require little to no glazing. Glazing that supports the use within should be incentivized, clerestory and skylights for warehouse and extensive glazing for office areas with wall panels designed to receive future windows. Care should be taken not to disincentivize logistics and advanced manufacturing facilities.

Catalyst Projects

Oftentimes regions can leap frog forward along a strategic direction through a catalyst project. These are often through a public private partnership around a vision. Kent Station was such a project. Is Kent in a position for another? The project example above is the Retail & Bike Pavilion from the Spring District in Bellevue and it offers a more modest example. It is a multi-use building strategically placed as a community asset that speaks directly to an aspirational lifestyle. This is enhancing the brand of Bellevue and the Spring District as well as all the owners and tenants close by.

Summary:

To support the strategic goals seeking out whether a catalyst project can be conceived, developed and built specifically for the Valley. This should announce to Kent residents and workers and the greater Valley that something new is happening here and place a refreshed Kent Industrial Valley on the map nationwide.

Industrial User Building Types and Needs

The following table summarizes high-level building needs by different industrial building users.

Exhibit 34. Industrial Building Types and User Needs

	Building Type					
Primary Type	Manufacturing	Warehouse			Flex	
			Distribution			
Sub-type/ Special Purpose	General Purpose	General Purpose Warehouse	General Purpose Distribution	Truck Terminal	General Purpose Flex	Service Center/ Showroom
Size (sf)	Any	50k+	50k+	20k+	20k+	<150k
Clear Height (ft)	10+	16+	16+	12-16	10-18	15-25
Loading Docks	Yes	Yes	Yes	Cross-dock	Yes	Yes
Door-to-Square-Foot Ratio	Varies	1:5k-15k	1:3k-10k	1:500-5k	1:5k-15k+	1:10k
Office Percentage	<20%	<15%	<20%	<10%	25-100%	30-40%
Divisibility (Smallest suite – sf)	Varies	15k+	50k+	10k+	5k+	2k+
Curb Appeal	Low	Low	Low	Low	High	High
Automobile Parking Ratio	Varies	Low	Low	Varies	High	High
Primary Use	Manufacturing	Storage, Distribution	Distribution	Truck Trans-shipment	R&D, Storage, Office, Lab, Retail, Light Manufacturing	Showroom, Storage, Light Manufacturing
Sub-Sets	Heavy, Light Manufacturing	Bulk Warehouse, Cold/Refrigerator Storage, Freezer Storage, High-Cube, Self Storage, Bonded	Overnight Delivery Services, Air Cargo		Garden Office, Incubator, Tech	Shallow-Bay

Source: NAIOP