

Whatcom County, Washington



**PORT OF BELLINGHAM
REGIONAL ECONOMIC PARTNERSHIP**

Whatcom County Industrial Lands Study.

Presented by:
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Study Prepared by:



MAUL FOSTER ALONGI

Scope of Contract

- Industry trends that influence how industrial land is developed.
- How industrial land is used in the county and where it is available.
- If industrial land supply is adequate to accommodate anticipated demand under growth scenarios.
- Infrastructure investments that must be prioritized to support pad-ready development sites.
- Potential areas available for rezoning to support industrial growth and regulatory modifications.



Photo: Crexi.com



Approaches – Report Layout

Industry Sector Trends

Assess key industrial sectors in the county and trends influencing how those industries use land.

Whatcom County Industrial Landscape

Provide an understanding of current industrial land use by assessing historical industrial building trends and related land consumption + how much industrially zoned land remains in the county.

Developable Land Analysis

Analyzes the quantity/quality of net developable industrially zoned land in the county overall and in 19 industrial areas

Reconciliation Analysis

Balances anticipated future industrial land needs with the net developable land in the county.





Context



NEXT

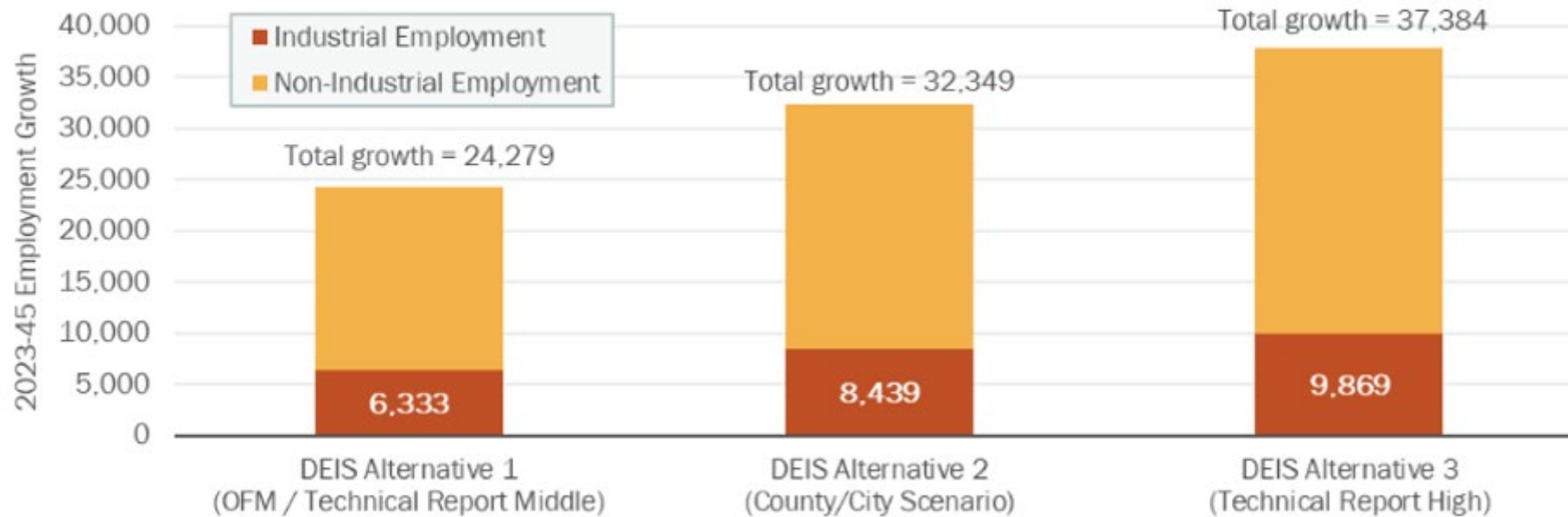
Context

- Inform 2025 Comprehensive Plan Update
- Build on recent Land Capacity Analysis and Buildable Lands Analysis
- Determine whether an adequate supply of industrial lands exists to accommodate future demand-based employment projections



Comprehensive Plan Inputs

DEIS Employment Growth Scenarios, 2023–2045



Consistent Metric Observations from the Technical Report and DEIS

Employment compound annual growth rates, both total jobs and industrial jobs are the same for each alternative between 2023 and 2045.

Alternative 1: .089%

Alternative 2: 1.15%

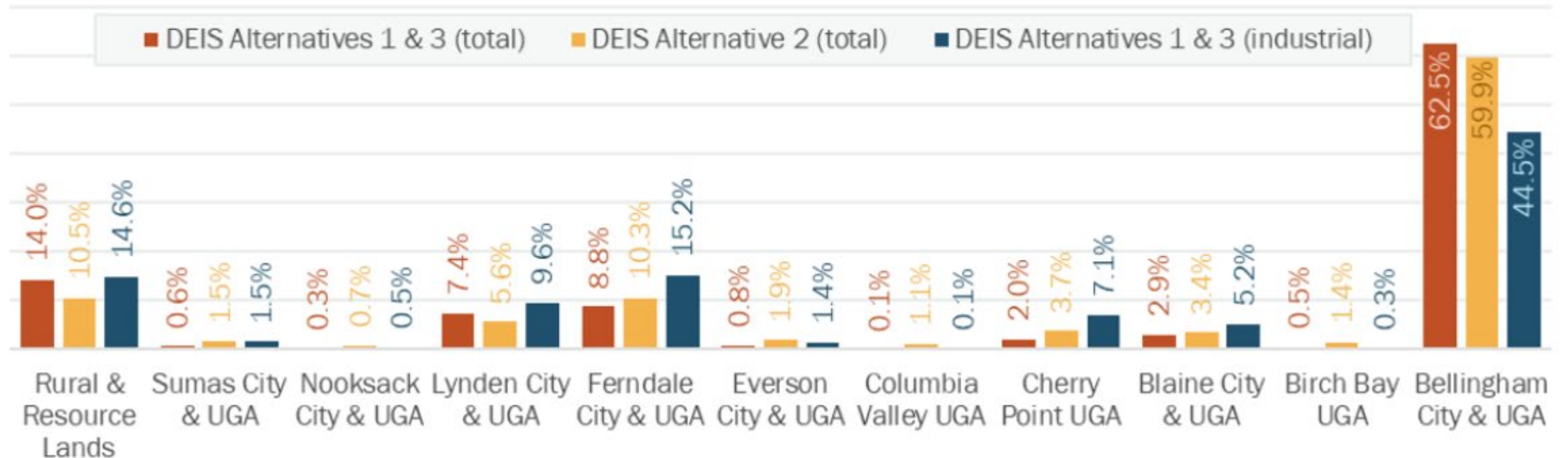
Alternative 3: 1.33%

The industrial jobs capture rate of total jobs is **26.1%**.

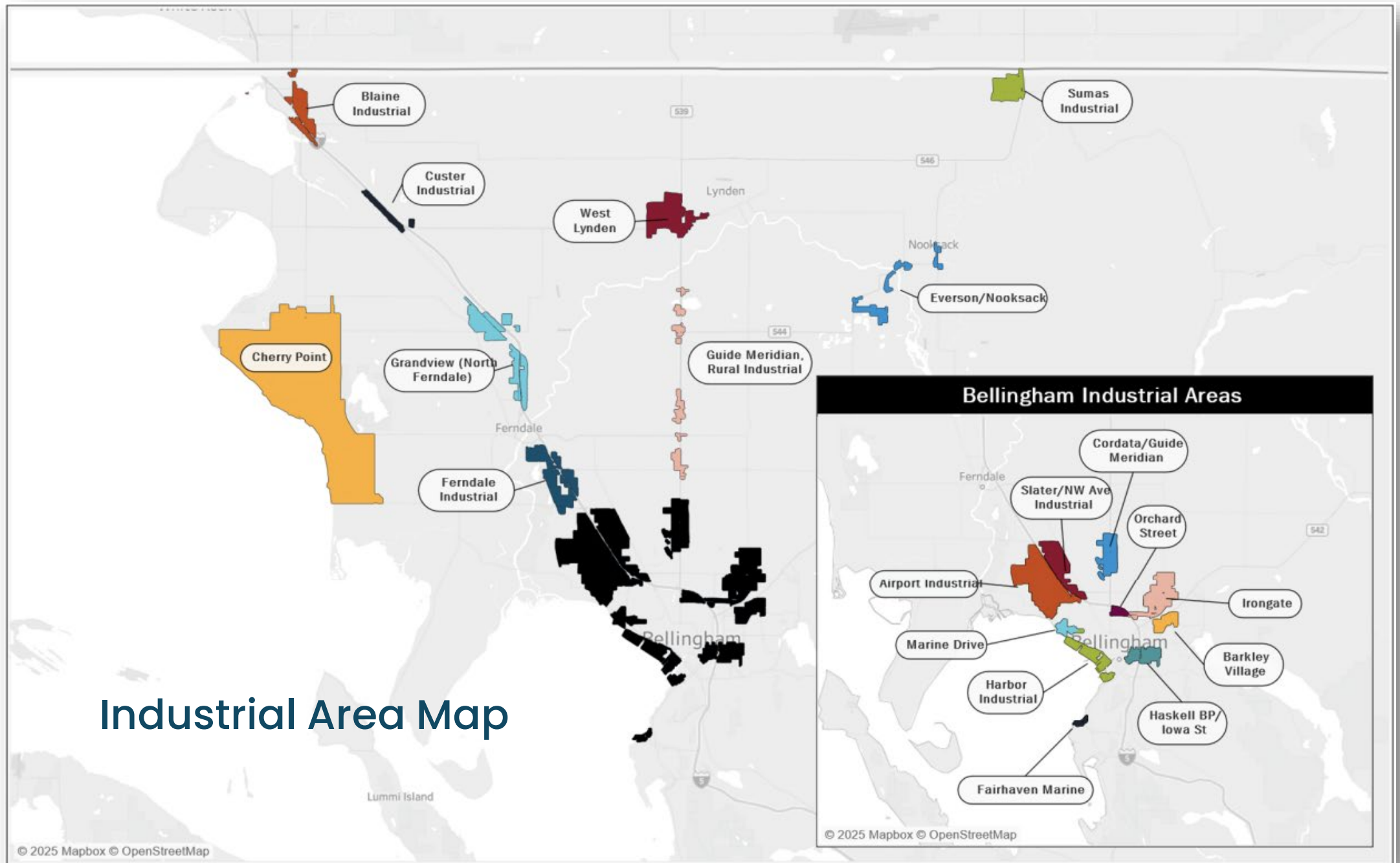
This metric is used for all alternatives.

Comprehensive Plan Inputs

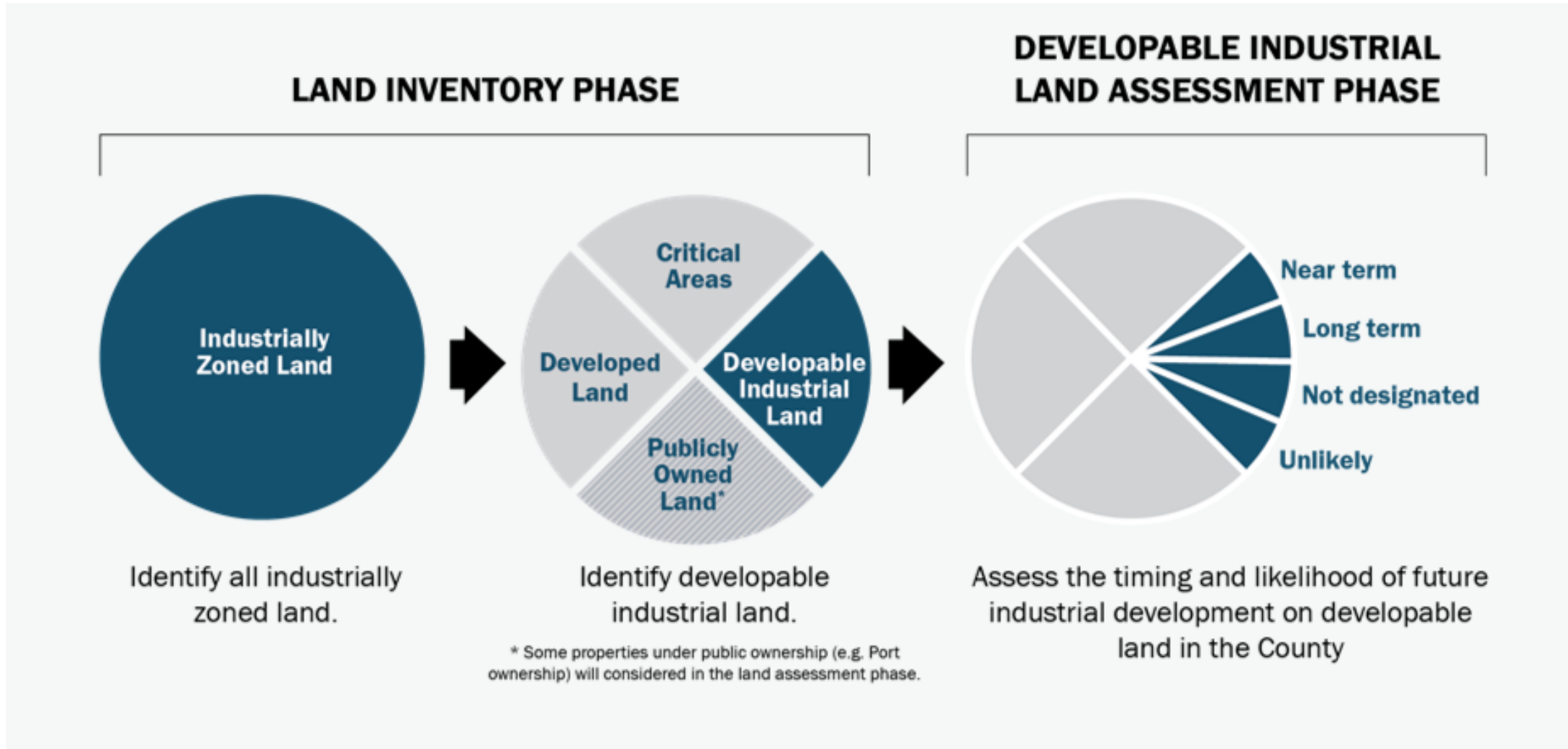
Total and Industrial Employment Allocation Rates by UGA



Industrial Area Map

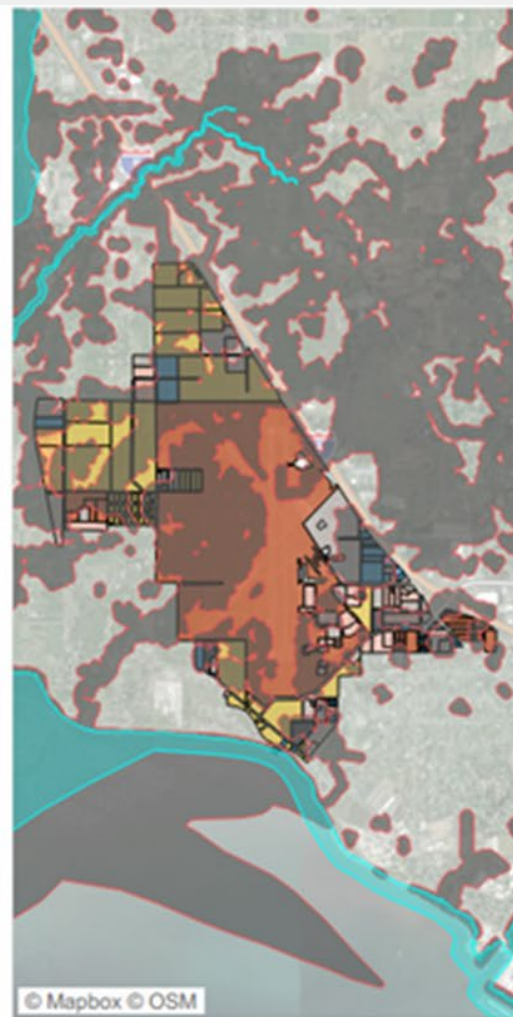
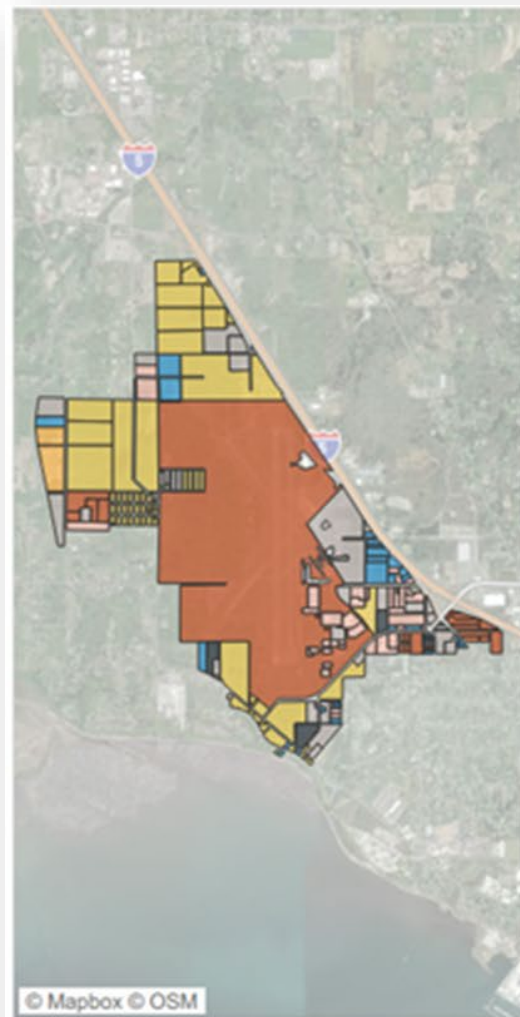


Developable Industrial Lands



Industrial Area Map

Bellingham Airport Industrial Area



Map Legend Critical Area Reduction FEMA Floodplain

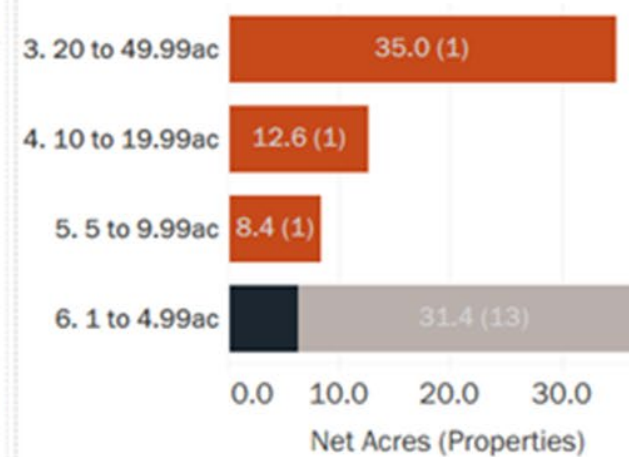
Developable Acres by Category

	Net Acres	Properties
1. Near Term (≥ 5 ac)	61.2	4
2. Long Term (≥ 5 ac)	11.2	1
3. Developable, Vacant+Very Underutiliz..	48.2	21
4. Developable, Underutilized (1 to <5 ac)	7.8	4
5. Developable (<1 ac)	9.2	28
6. Unlikely	129.1	8
7. Developed	59.1	20
Total	325.9	86

Development Category

- 1. Near Term (≥ 5 ac)
- 2. Long Term (≥ 5 ac)
- 3. Developable, Vacant+Very Underutilized (..
- 4. Developable, Underutilized (1 to <5 ac)
- 5. Developable (<1 ac)
- 6. Unlikely
- 7. Developed

Along a Truck Freight Corridor

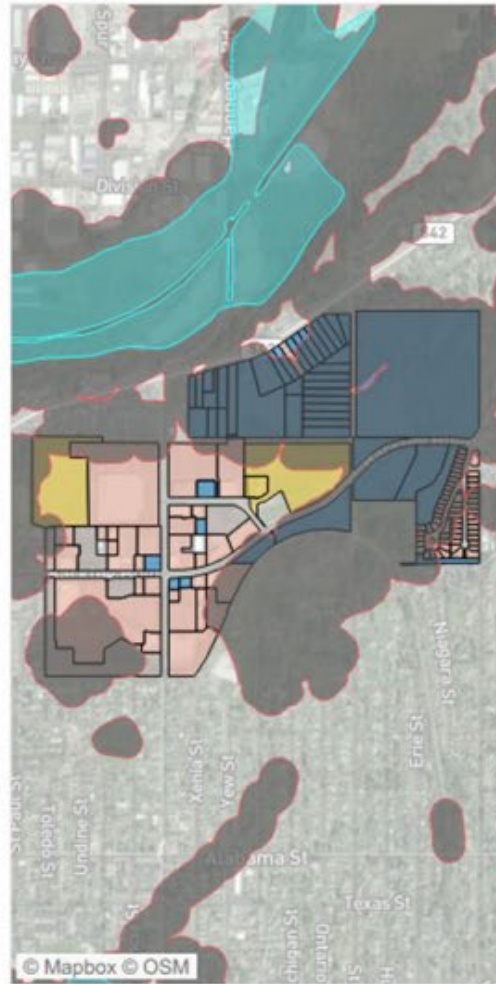
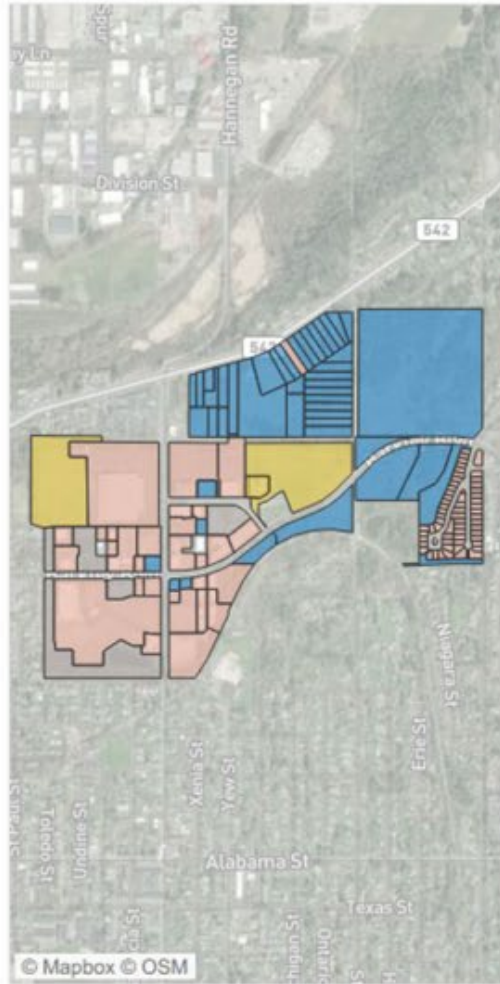


Along a Truck Freight Corridor + Fully Served



Industrial Area Map

Bellingham Barkley Village Industrial Area



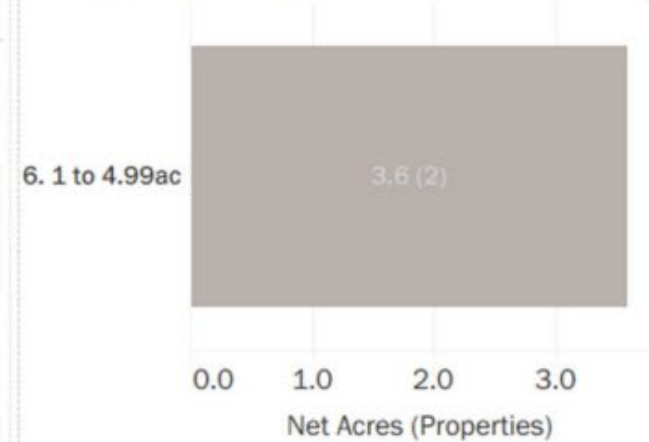
Developable Acres by Category

	Net Acres	Properties
3. Developable, Vacant+Very Underutilized (1 to <5ac)	8.9	4
5. Developable (<1ac)	4.4	14
6. Unlikely	15.4	2
7. Developed	57.6	24
Total	86.4	44

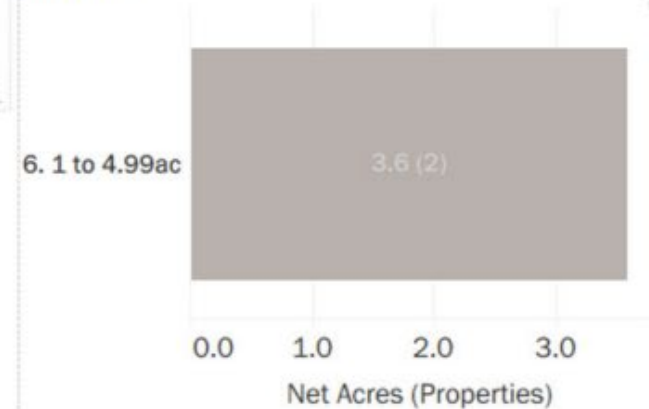
Development Category

- 3. Developable, Vacant+Very Underutilized (..
- 5. Developable (<1ac)
- 6. Unlikely
- 7. Developed

Along a Truck Freight Corridor



Along a Truck Freight Corridor + Fully Served



Map Legend



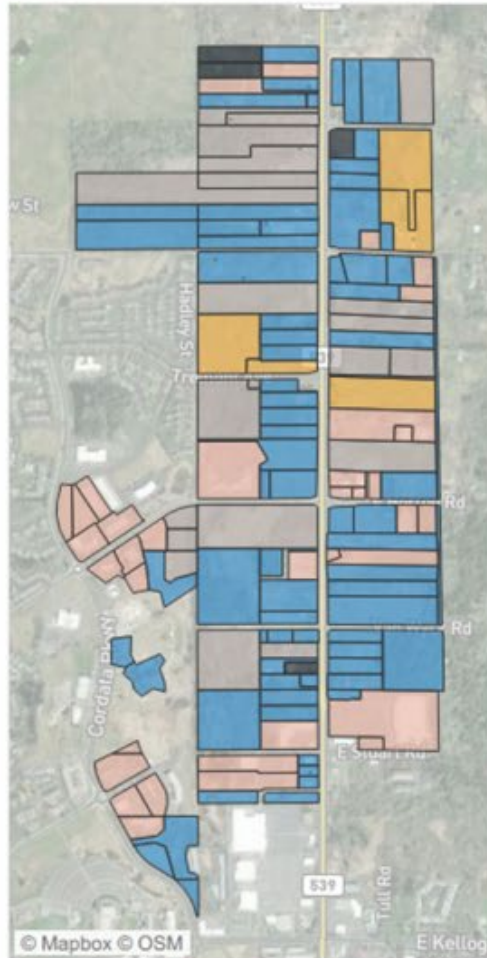
Critical Area Reduction



FEMA Floodplain

Industrial Area Map

Bellingham Cordata/Guide Meridian Industrial Area



Map Legend



Critical Area Reduction



FEMA Floodplain

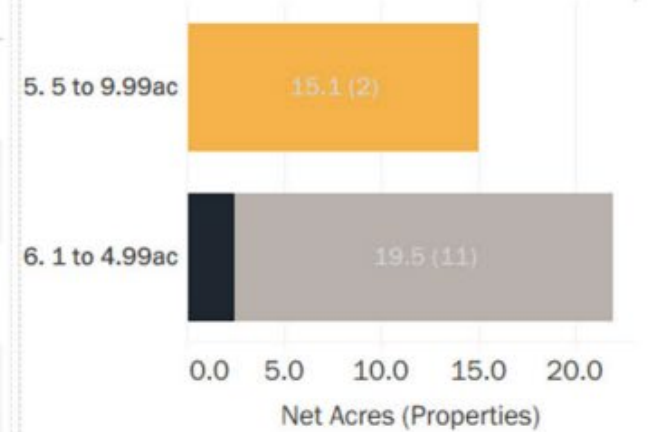
Developable Acres by Category

	Net Acres	Properties
2. Long Term (≥ 5 ac)	21.3	3
3. Developable, Vacant+Very Underutilized (1 to <5 ac)	27.6	16
4. Developable, Underutilized (1 to <5 ac)	5.3	3
5. Developable (<1 ac)	17.0	58
7. Developed	36.0	26
Total	107.2	106

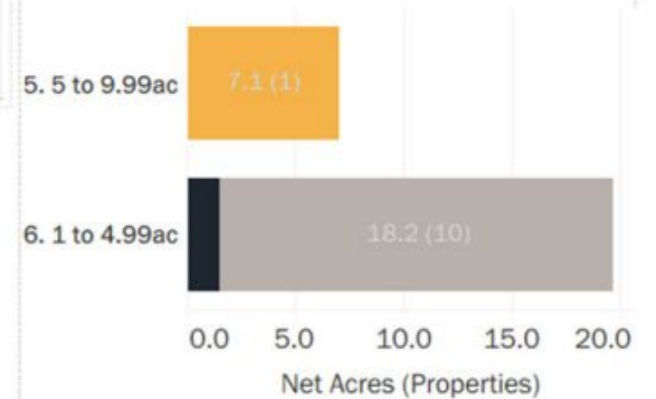
Development Category

- 2. Long Term (≥ 5 ac)
- 3. Developable, Vacant+Very Underutilized (..
- 4. Developable, Underutilized (1 to <5 ac)
- 5. Developable (<1 ac)
- 7. Developed

Along a Truck Freight Corridor



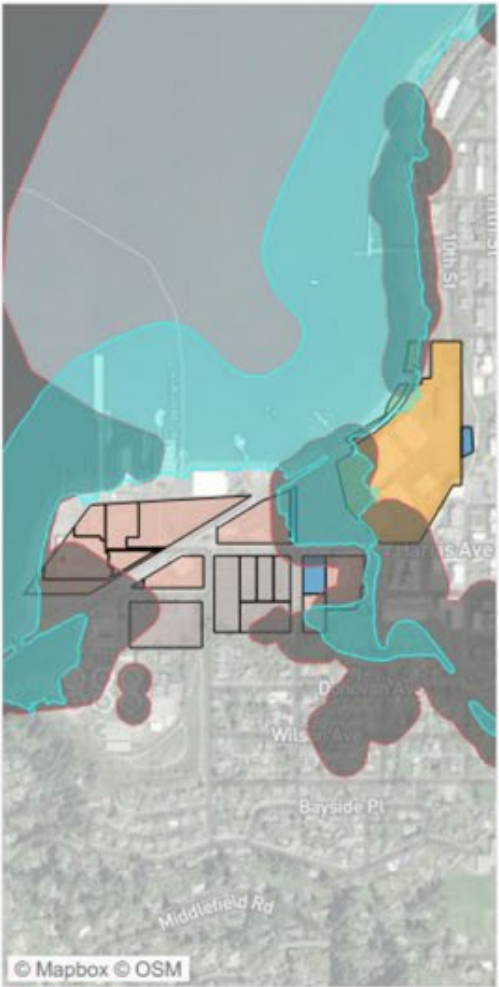
Along a Truck Freight Corridor + Fully Served





Industrial Area Map

Bellingham Fairhaven Marine Industrial Area



Developable Acres by Category		
	Net Acres	Properties
2. Long Term (>=5ac)	11.6	1
3. Developable, Vacant+Very Underutilized (1 to <5ac)	7.4	3
5. Developable (<1ac)	1.0	3
7. Developed	10.1	4
Total	30.0	11

- Development Category
- 2. Long Term (>=5ac)
 - 3. Developable, Vacant+Very Underutilized (..
 - 5. Developable (<1ac)
 - 7. Developed

Along a Truck Freight Corridor

Along a Truck Freight Corridor + Fully Served

Map Legend

- Critical Area Reduction
- FEMA Floodplain

Industrial Area Map

Bellingham Harbor Industrial Area



Developable Acres by Category

	Net Acres	Properties
1. Near Term (≥ 5 ac)	9.0	1
2. Long Term (≥ 5 ac)	33.4	2
3. Developable, Vacant+Very Underutiliz..	12.2	6
5. Developable (< 1 ac)	3.5	10
6. Unlikely	103.0	1
7. Developed	25.0	6
Total	186.0	26

Development Category

- 1. Near Term (≥ 5 ac)
- 2. Long Term (≥ 5 ac)
- 3. Developable, Vacant+Very Underutilized (..
- 5. Developable (< 1 ac)
- 6. Unlikely
- 7. Developed

Along a Truck Freight Corridor



Along a Truck Freight Corridor + Fully Served



Map Legend



Critical Area Reduction



FEMA Floodplain

Industrial Area Map

Bellingham Iowa St/Haskell BP Industrial Area



Map Legend



Critical Area Reduction



FEMA Floodplain

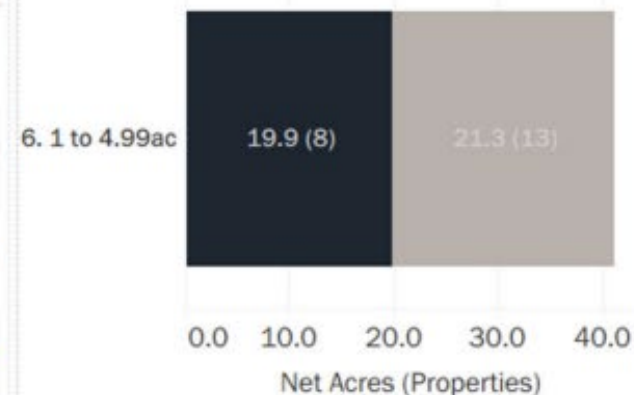
Developable Acres by Category

	Net Acres	Properties
3. Developable, Vacant+Very Underutilized (1 to <5ac)	21.3	13
4. Developable, Underutilized (1 to <5ac)	23.8	10
5. Developable (<1ac)	48.7	179
6. Unlikely	18.8	2
7. Developed	48.1	111
Total	160.8	315

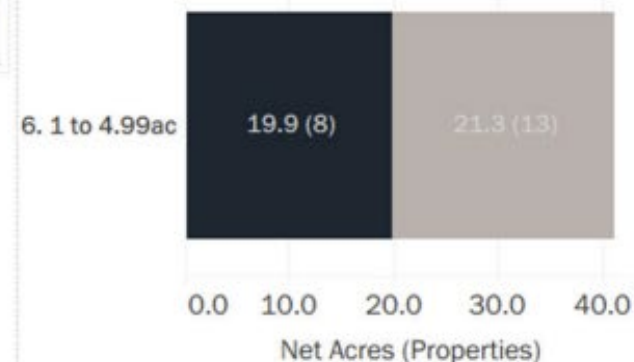
Development Category

- 3. Developable, Vacant+Very Underutilized (..
- 4. Developable, Underutilized (1 to <5ac)
- 5. Developable (<1ac)
- 6. Unlikely
- 7. Developed

Along a Truck Freight Corridor

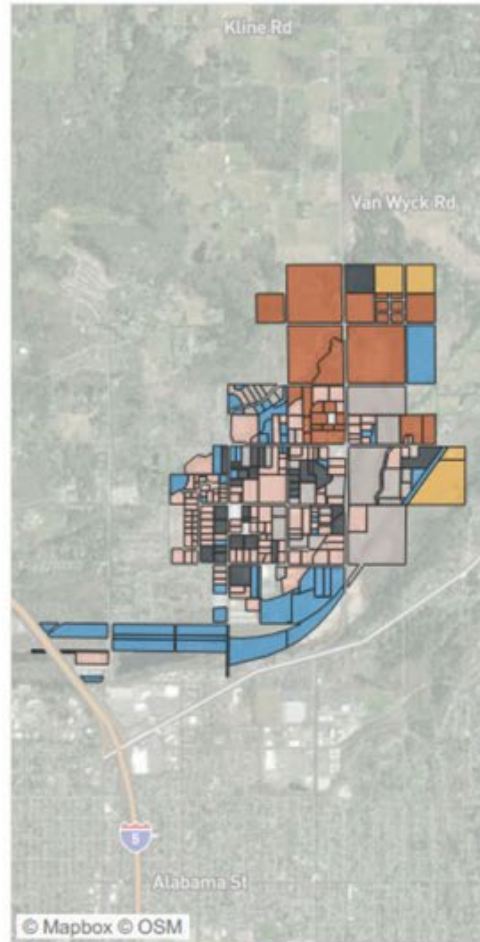


Along a Truck Freight Corridor + Fully Served



Industrial Area Map

Bellingham Irongate Industrial Area



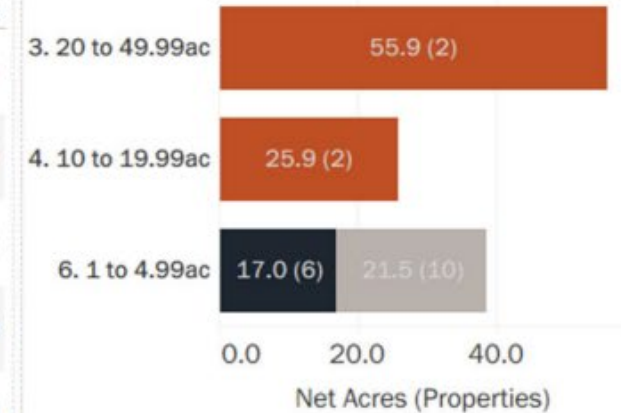
Developable Acres by Category

	Net Acres	Properties
1. Near Term (≥ 5 ac)	87.9	5
2. Long Term (≥ 5 ac)	26.2	3
3. Developable, Vacant+Very Underutiliz..	46.3	22
4. Developable, Underutilized (1 to <5 ac)	39.4	16
5. Developable (<1 ac)	14.8	38
7. Developed	110.4	102
Total	325.0	186

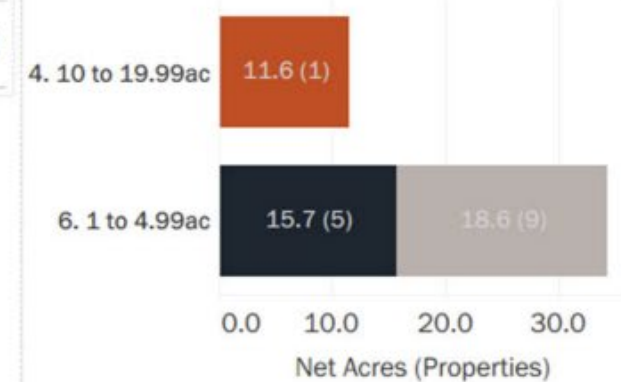
Development Category

- 1. Near Term (≥ 5 ac)
- 2. Long Term (≥ 5 ac)
- 3. Developable, Vacant+Very Underutilized (..
- 4. Developable, Underutilized (1 to <5 ac)
- 5. Developable (<1 ac)
- 7. Developed

Along a Truck Freight Corridor

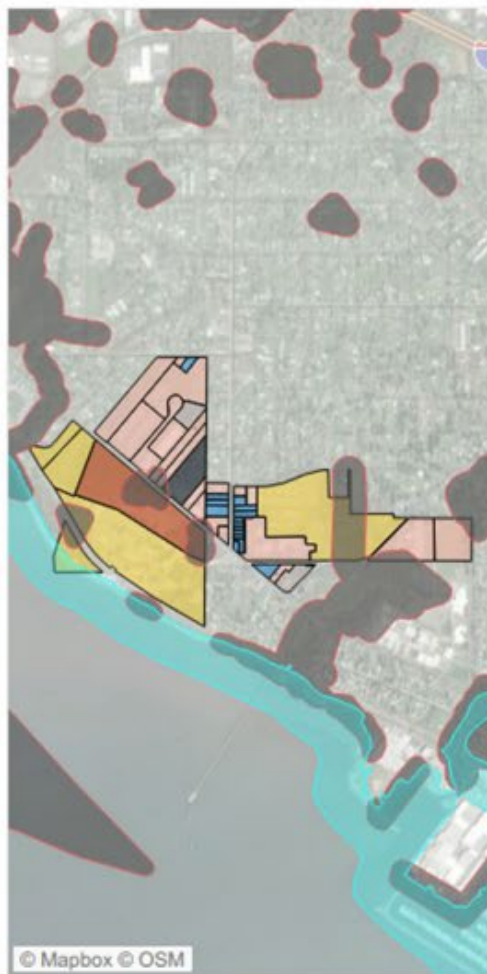


Along a Truck Freight Corridor + Fully Served



Industrial Area Map

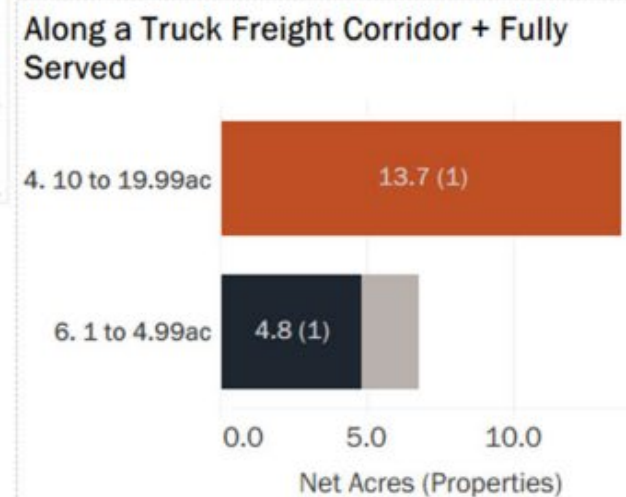
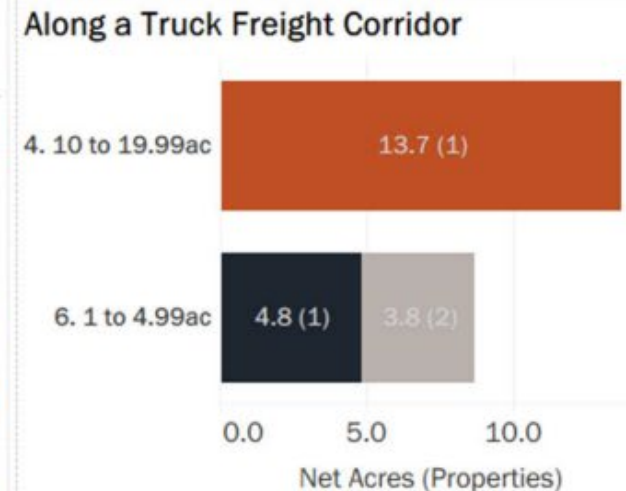
Bellingham Marine Drive Industrial Area



Developable Acres by Category		
	Net Acres	Properties
1. Near Term (>=5ac)	13.7	1
3. Developable, Vacant+Very Underutiliz..	3.8	2
4. Developable, Underutilized (1 to <5ac)	4.8	1
5. Developable (<1ac)	5.7	10
6. Unlikely	63.2	3
7. Developed	50.9	17
Total	142.1	34

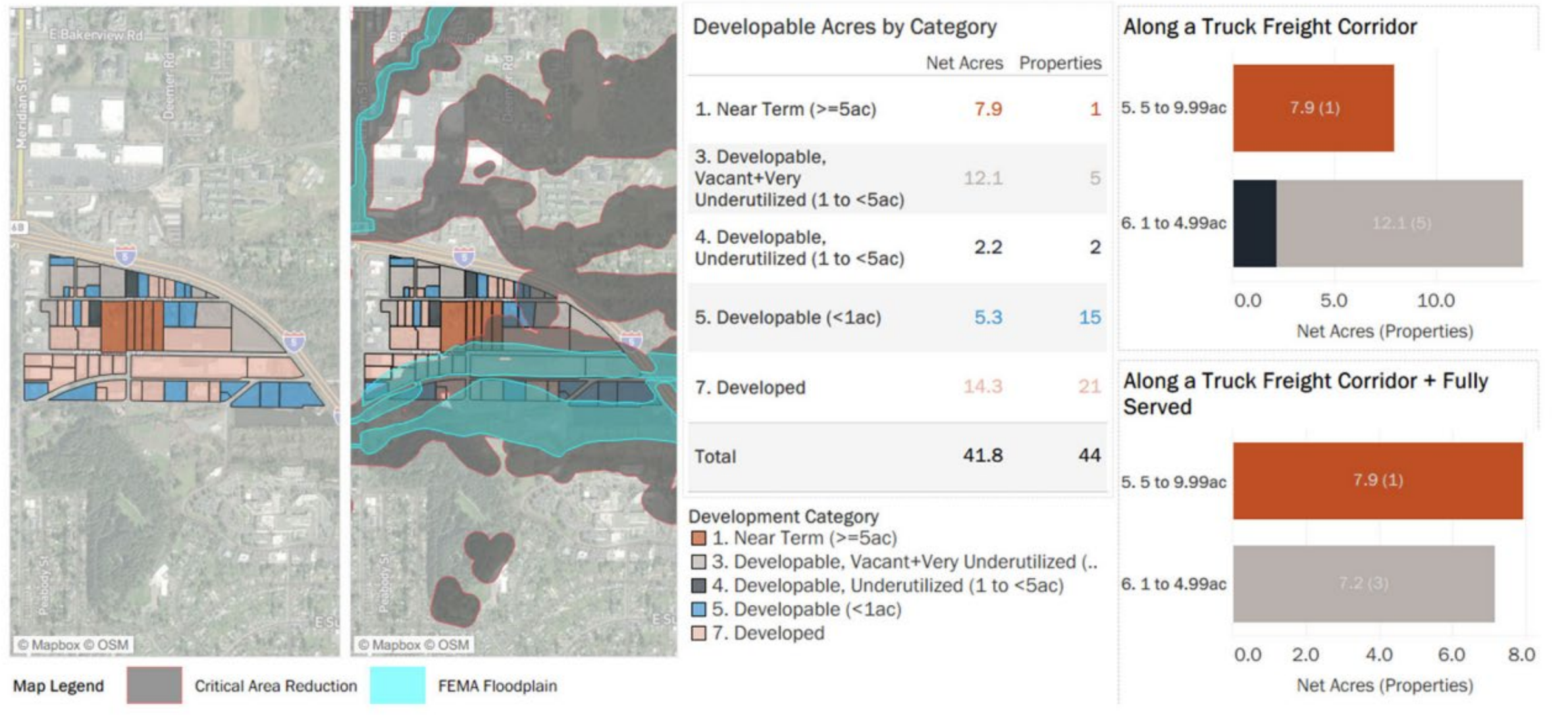
Development Category

-  1. Near Term (≥ 5 ac)
-  3. Developable, Vacant+Very Underutilized (..)
-  4. Developable, Underutilized (1 to <5 ac)
-  5. Developable (<1 ac)
-  6. Unlikely
-  7. Developed



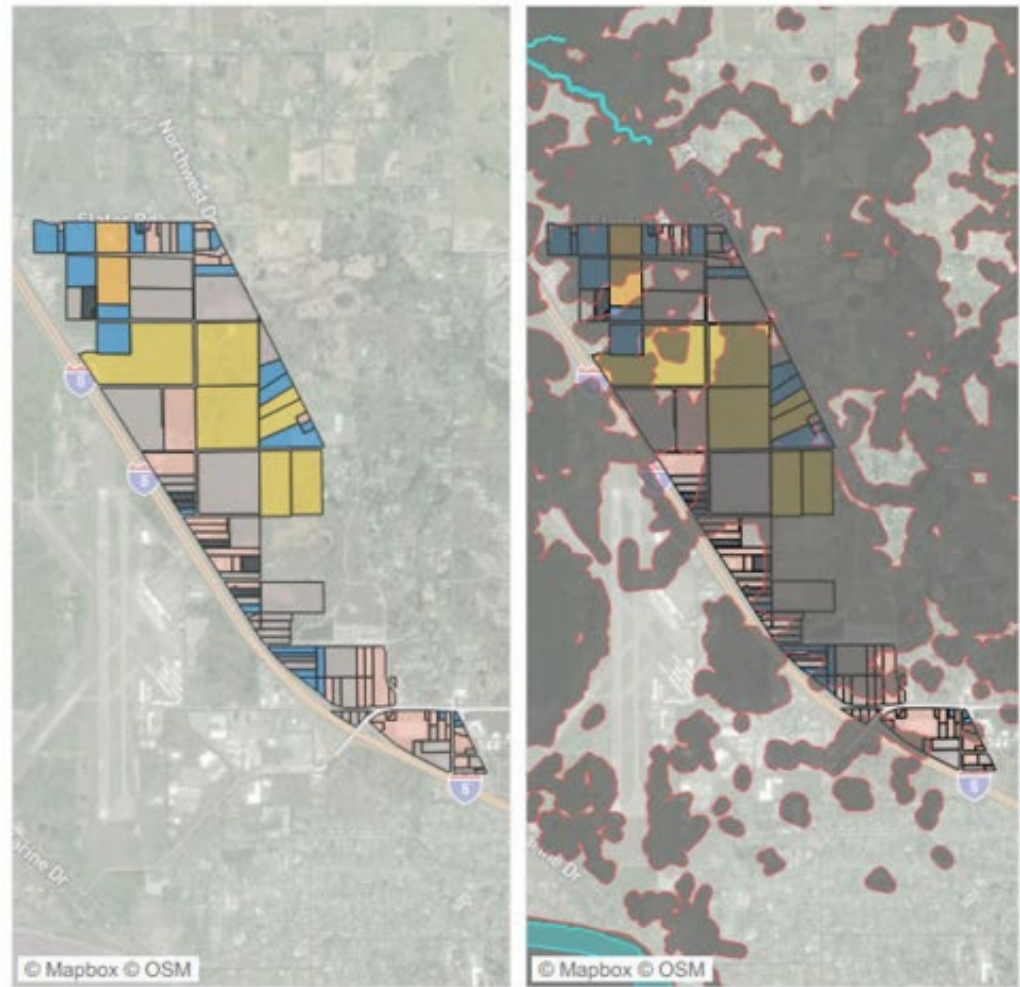
Industrial Area Map

Bellingham Orchard Street Industrial Area

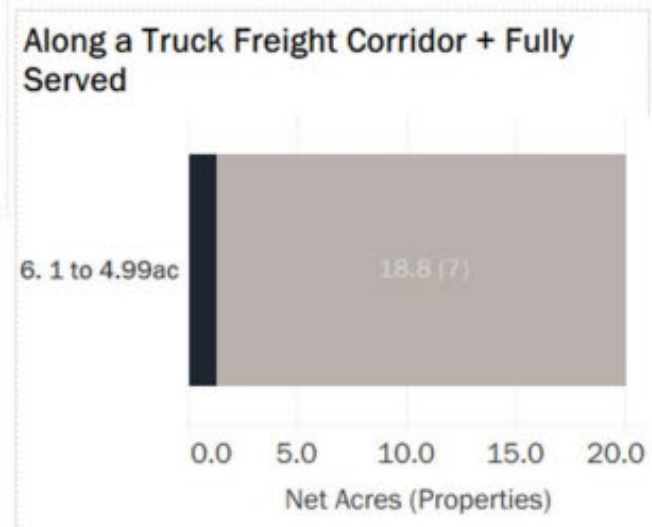
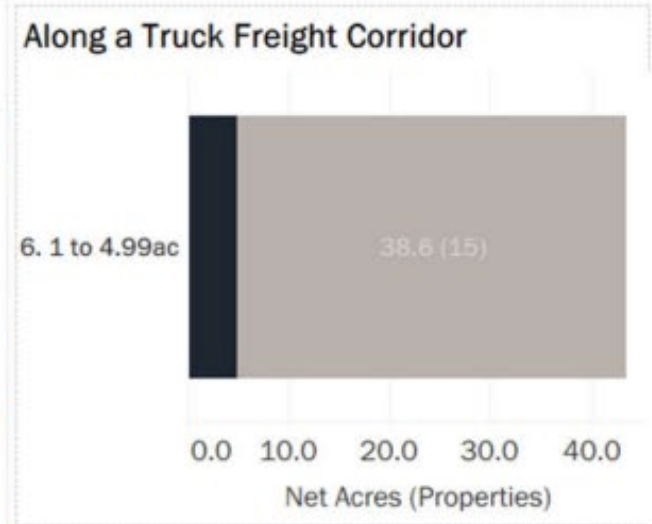
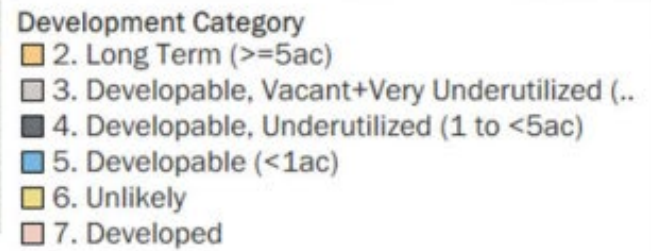


Industrial Area Map

Bellingham Slater/NW Ave Industrial Area

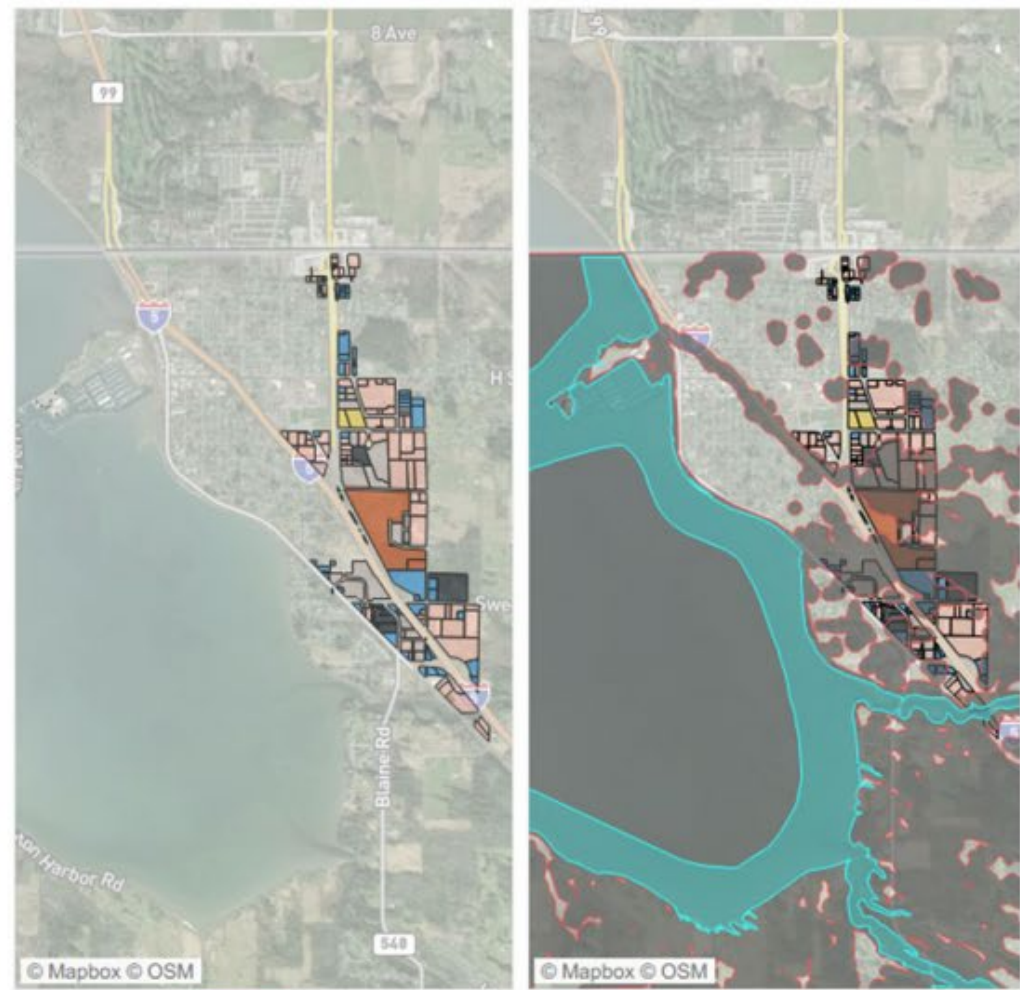


Developable Acres by Category		
	Net Acres	Properties
2. Long Term (≥ 5 ac)	6.7	1
3. Developable, Vacant+Very Underutiliz..	50.5	19
4. Developable, Underutilized (1 to <5 ac)	10.0	5
5. Developable (<1 ac)	8.1	23
6. Unlikely	30.3	4
7. Developed	54.9	28
Total	160.6	80



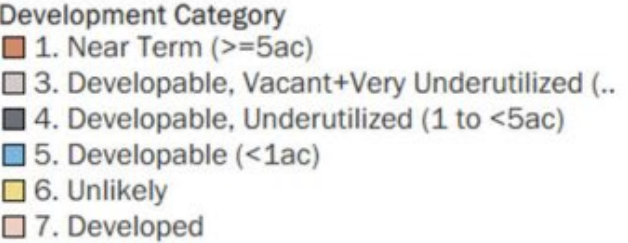
Industrial Area Map

Blaine Industrial Area



Developable Acres by Category

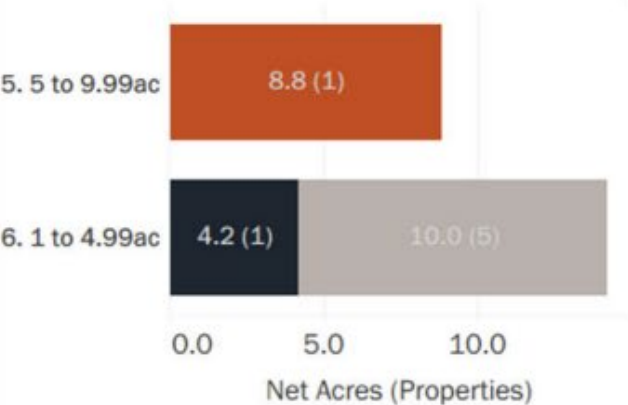
	Net Acres	Properties
1. Near Term (≥ 5 ac)	8.8	1
3. Developable, Vacant+Very Underutiliz..	18.8	10
4. Developable, Underutilized (1 to <5 ac)	7.7	3
5. Developable (<1 ac)	16.0	47
6. Unlikely	6.4	1
7. Developed	96.2	49
Total	154.0	111



Along a Truck Freight Corridor



Along a Truck Freight Corridor + Fully Served



Map Legend Critical Area Reduction FEMA Floodplain

Industrial Area Map

Cherry Point Industrial Area

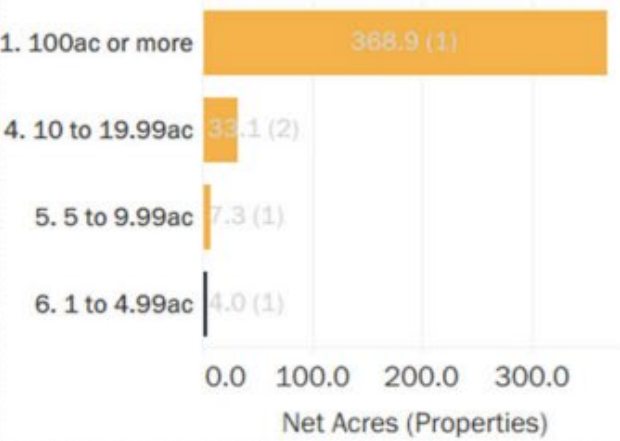


Developable Acres by Category

	Net Acres	Properties
1. Near Term (≥ 5 ac)	168.2	2
2. Long Term (≥ 5 ac)	621.9	12
4. Developable, Underutilized (1 to < 5 ac)	4.0	1
5. Developable (< 1 ac)	1.6	5
6. Unlikely	211.3	5
7. Developed	2,681.2	10
Total	3,688.3	34

- Development Category
- 1. Near Term (≥ 5 ac)
 - 2. Long Term (≥ 5 ac)
 - 4. Developable, Underutilized (1 to < 5 ac)
 - 5. Developable (< 1 ac)
 - 6. Unlikely
 - 7. Developed

Along a Truck Freight Corridor



Along a Truck Freight Corridor + Fully Served

Industrial Area Map

Custer Industrial Area



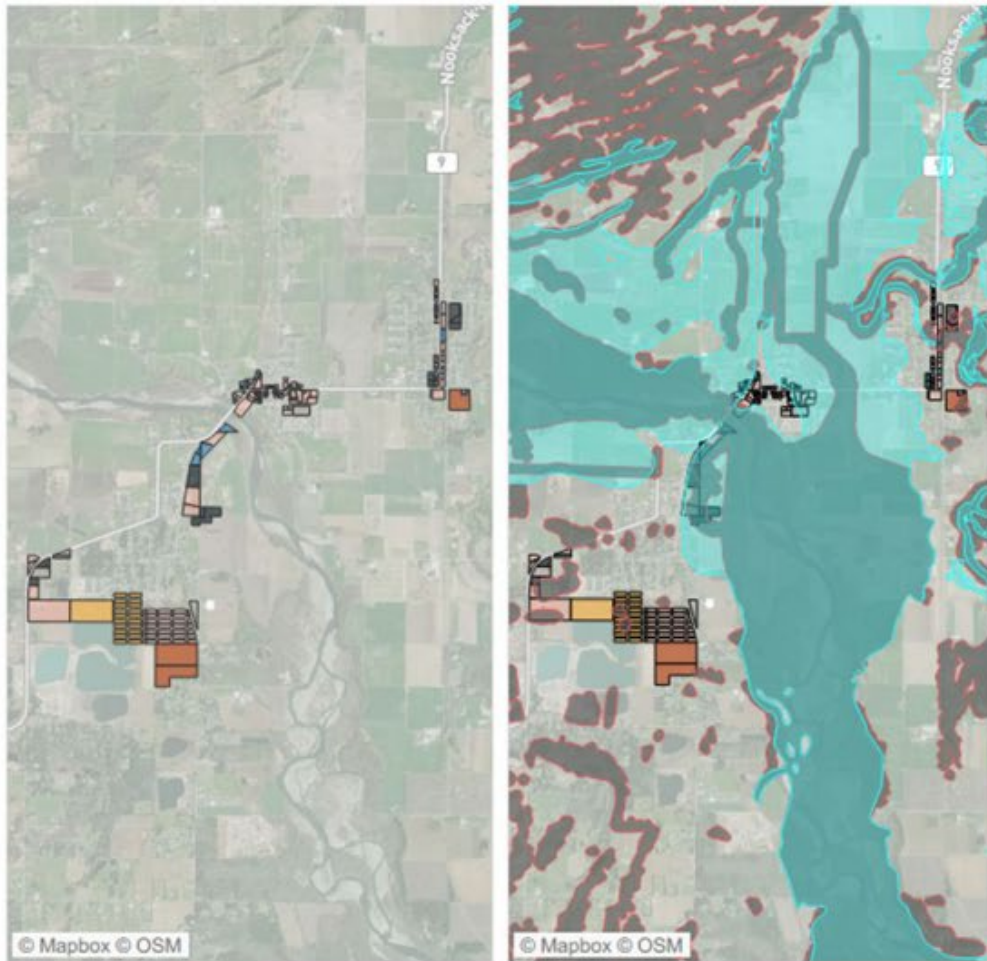
Developable Acres by Category		
	Net Acres	Properties
1. Near Term (≥ 5 ac)	6.6	1
3. Developable, Vacant+Very Underutiliz..	18.7	7
4. Developable, Underutilized (1 to <5 ac)	3.7	1
5. Developable (<1 ac)	1.2	4
6. Unlikely	9.0	1
7. Developed	47.7	8
Total	87.0	22

- Development Category
- 1. Near Term (≥ 5 ac)
 - 3. Developable, Vacant+Very Underutilized (..
 - 4. Developable, Underutilized (1 to <5 ac)
 - 5. Developable (<1 ac)
 - 6. Unlikely
 - 7. Developed



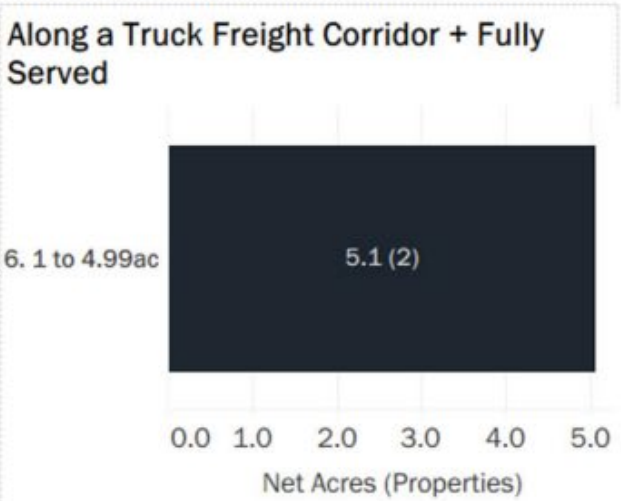
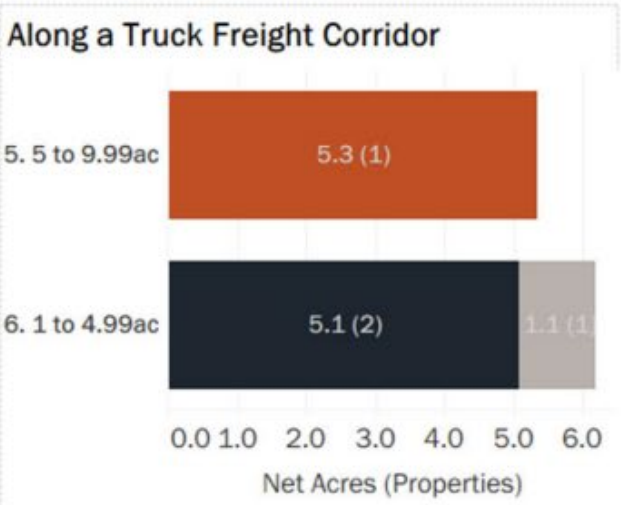
Industrial Area Map

Everson/Nooksack Industrial Area



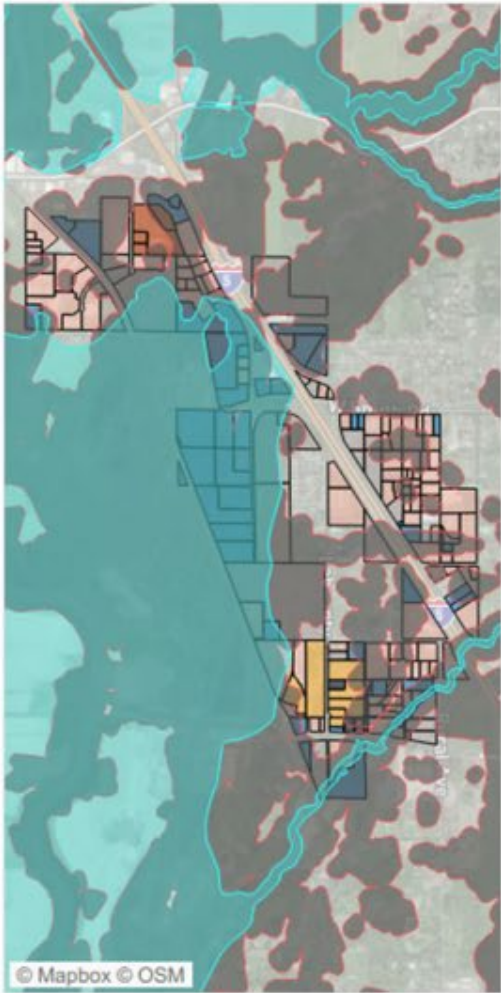
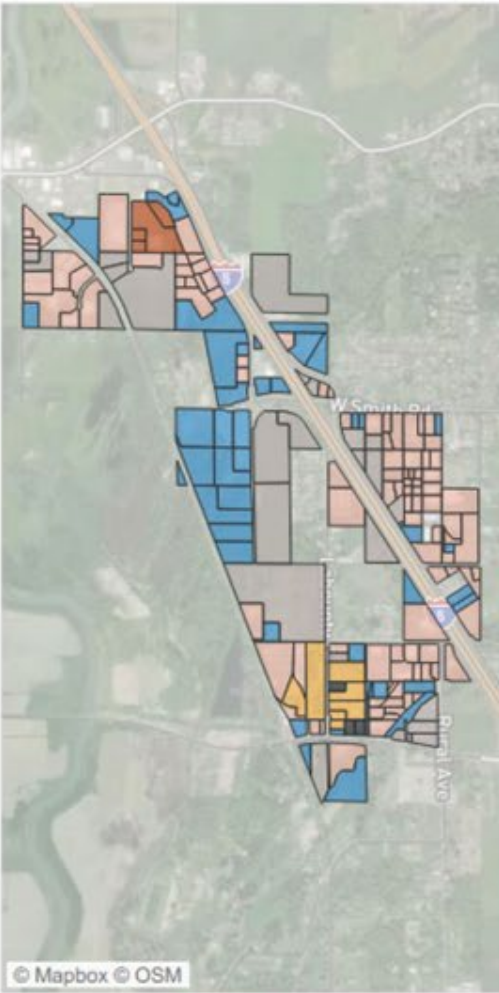
Developable Acres by Category		
	Net Acres	Properties
1. Near Term (≥ 5 ac)	38.2	3
2. Long Term (≥ 5 ac)	30.7	1
3. Developable, Vacant+Very Underutiliz..	19.0	8
4. Developable, Underutilized (1 to <5 ac)	15.5	6
5. Developable (<1 ac)	8.0	25
7. Developed	89.6	64
Total	201.0	107

- Development Category
- 1. Near Term (≥ 5 ac)
 - 2. Long Term (≥ 5 ac)
 - 3. Developable, Vacant+Very Underutilized (..
 - 4. Developable, Underutilized (1 to <5 ac)
 - 5. Developable (<1 ac)
 - 7. Developed



Industrial Area Map

Ferndale Industrial Area



Map Legend



Critical Area Reduction



FEMA Floodplain

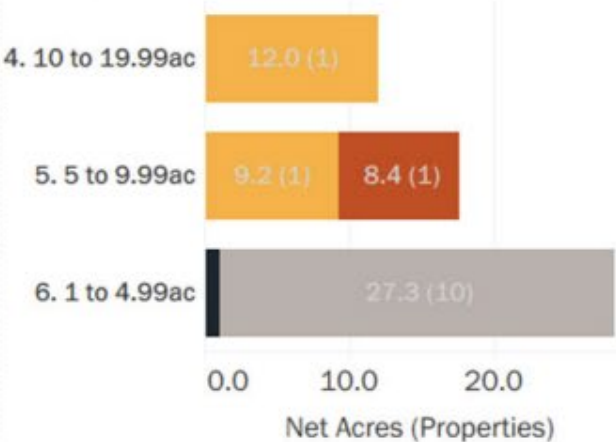
Developable Acres by Category

	Net Acres	Properties
1. Near Term (≥ 5 ac)	8.4	1
2. Long Term (≥ 5 ac)	21.3	2
3. Developable, Vacant+Very Underutiliz..	38.1	16
4. Developable, Underutilized (1 to <5 ac)	2.1	2
5. Developable (<1 ac)	9.7	36
7. Developed	113.9	61
Total	193.6	118

Development Category

- 1. Near Term (≥ 5 ac)
- 2. Long Term (≥ 5 ac)
- 3. Developable, Vacant+Very Underutilized (..
- 4. Developable, Underutilized (1 to <5 ac)
- 5. Developable (<1 ac)
- 7. Developed

Along a Truck Freight Corridor

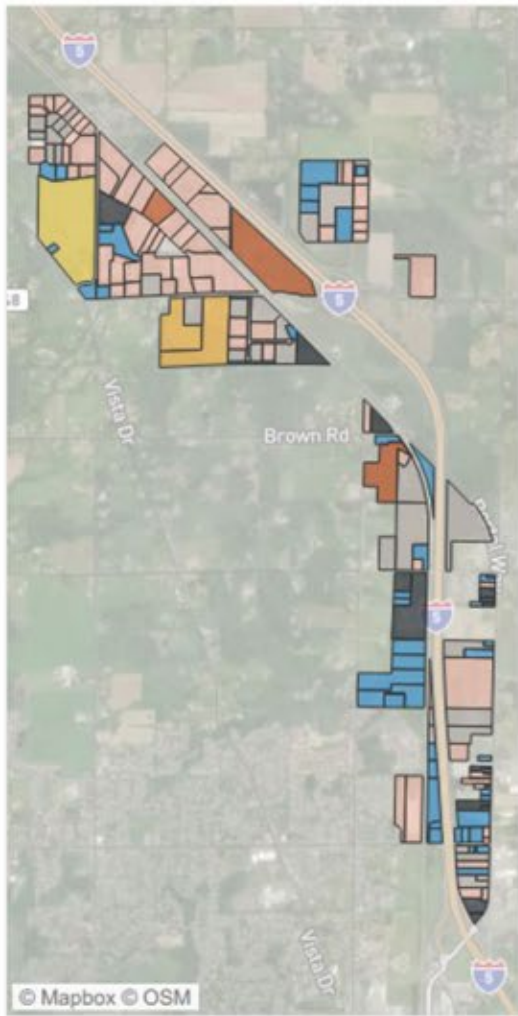


Along a Truck Freight Corridor + Fully Served



Industrial Area Map

Grandview (North Ferndale) Industrial Area



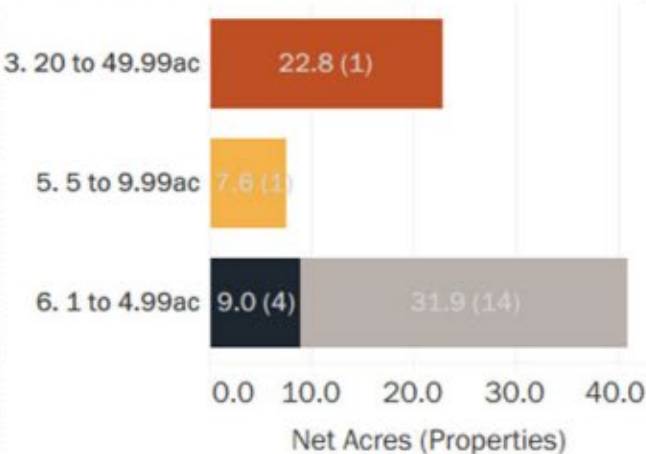
Developable Acres by Category

	Net Acres	Properties
1. Near Term (≥ 5 ac)	36.7	3
2. Long Term (≥ 5 ac)	7.6	1
3. Developable, Vacant+Very Underutiliz..	50.2	23
4. Developable, Underutilized (1 to <5 ac)	18.4	10
5. Developable (<1 ac)	13.3	41
6. Unlikely	5.1	1
7. Developed	106.4	52
Total	237.7	131

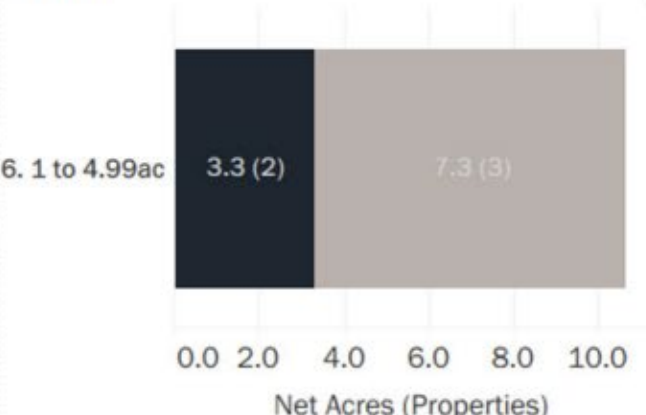
Development Category

- 1. Near Term (≥ 5 ac)
- 2. Long Term (≥ 5 ac)
- 3. Developable, Vacant+Very Underutilized (..
- 4. Developable, Underutilized (1 to <5 ac)
- 5. Developable (<1 ac)
- 6. Unlikely
- 7. Developed

Along a Truck Freight Corridor



Along a Truck Freight Corridor + Fully Served



Industrial Area Map

Guide Meridian, Rural Industrial



© Mapbox © OSM

© Mapbox © OSM

Map Legend



Critical Area Reduction



FEMA Floodplain

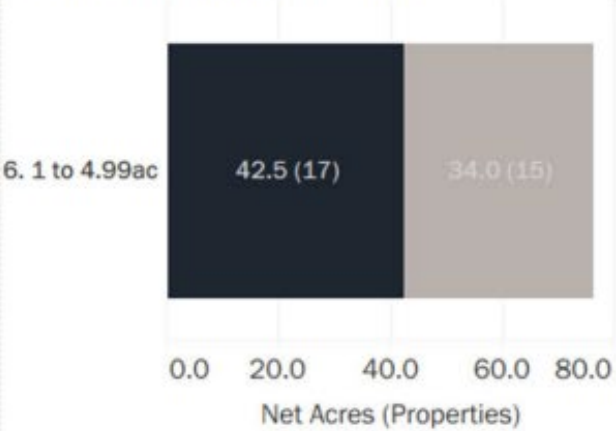
Developable Acres by Category

	Net Acres	Properties
3. Developable, Vacant+Very Underutilized (1 to <5ac)	34.0	15
4. Developable, Underutilized (1 to <5ac)	42.5	17
5. Developable (<1ac)	13.9	29
6. Unlikely	76.8	10
7. Developed	38.2	25
Total	205.3	96

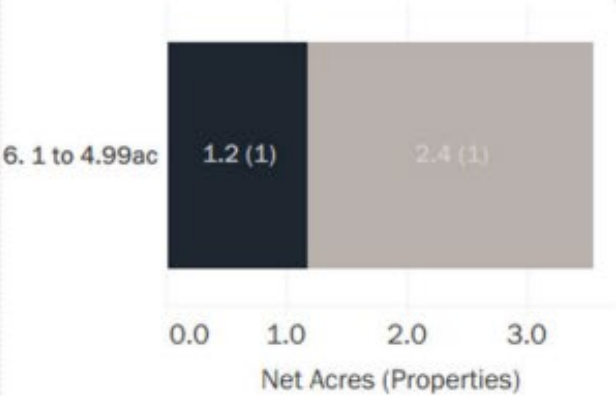
Development Category

- 3. Developable, Vacant+Very Underutilized (..
- 4. Developable, Underutilized (1 to <5ac)
- 5. Developable (<1ac)
- 6. Unlikely
- 7. Developed

Along a Truck Freight Corridor



Along a Truck Freight Corridor + Fully Served



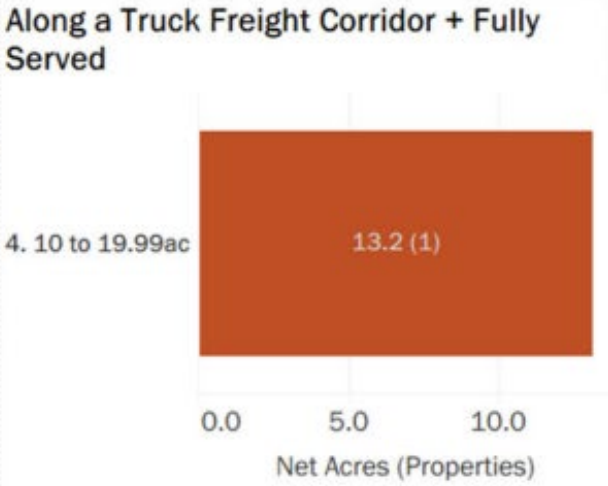
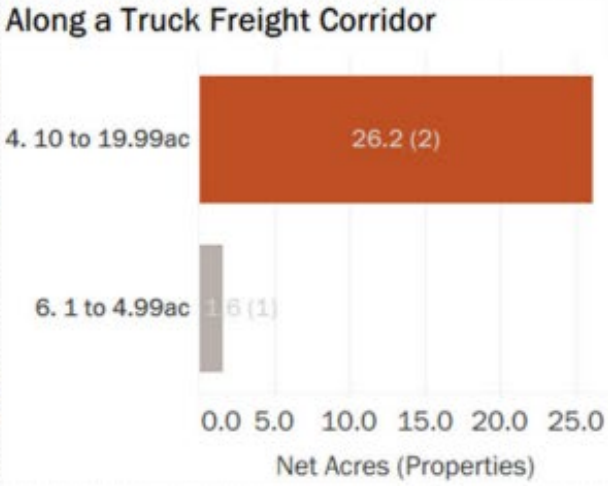
Industrial Area Map

Sumas Industrial



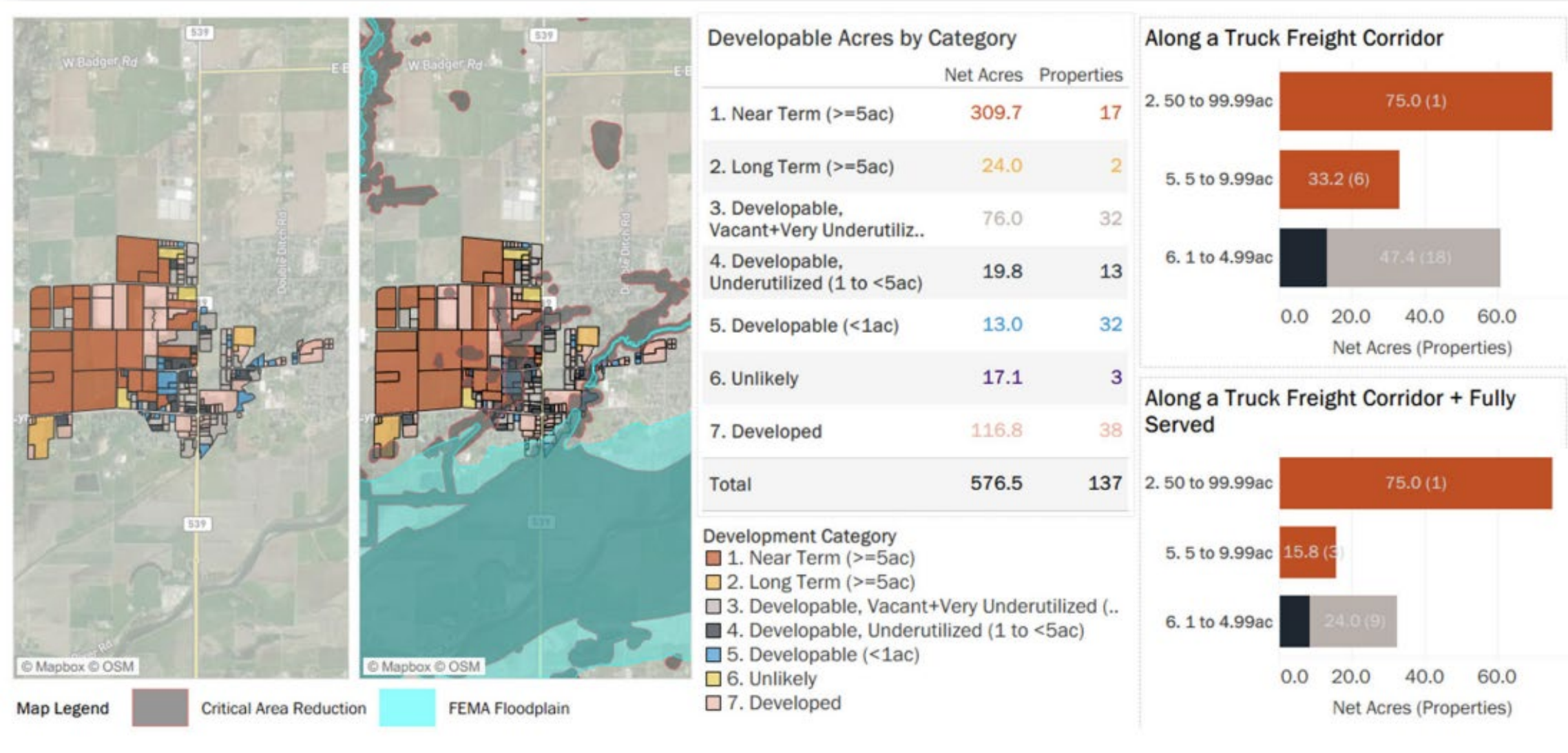
Developable Acres by Category		
	Net Acres	Properties
1. Near Term (>=5ac)	132.1	7
2. Long Term (>=5ac)	19.0	1
3. Developable, Vacant+Very Underutiliz..	7.0	4
5. Developable (<1ac)	4.3	18
6. Unlikely	7.0	1
7. Developed	110.9	24
Total	280.4	55

- Development Category
- 1. Near Term (>=5ac)
 - 2. Long Term (>=5ac)
 - 3. Developable, Vacant+Very Underutilized (..
 - 5. Developable (<1ac)
 - 6. Unlikely
 - 7. Developed



Industrial Area Map

West Lynden Area





Trends

WATERFRONTINDUSTRIAL.COM

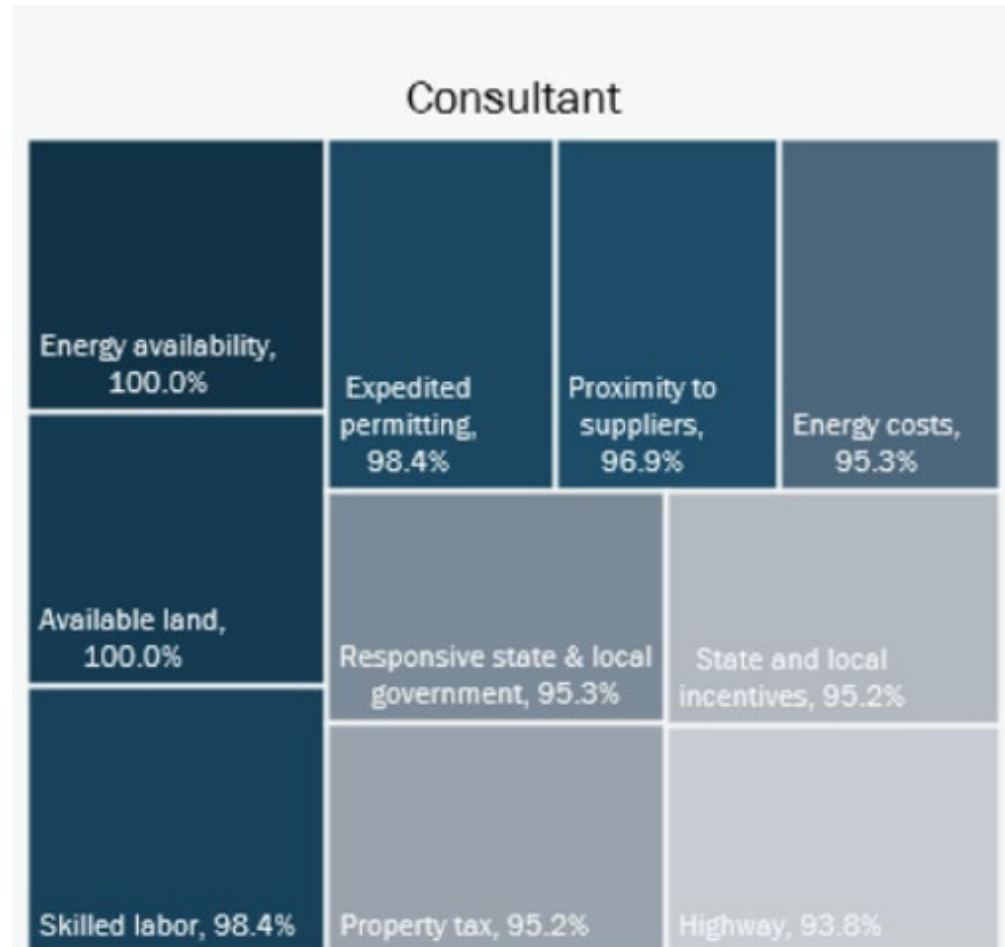
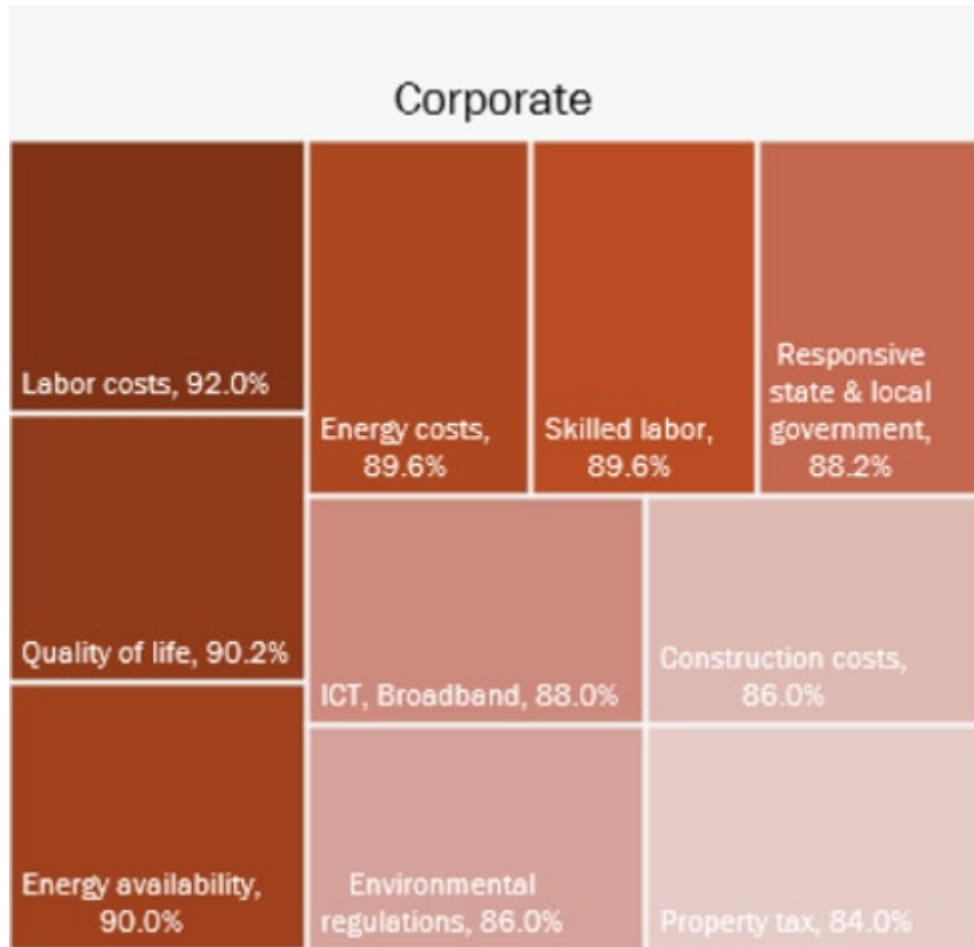


NEXT



**Kidder
Mathew**

Trends: Site Selection Factors





Trends: Target Industries

Food

Extraction
Fish
Berries
Shellfish
Processing
Cold Storage
Tidal Vision

Maritime

Boat Building
Ropes/Netting
Engine

Wood Products

Doors
Offsite Construction
Mass Timber
Paper Products

Supportive Manufacturing

Parts Manufacturing
Fabrication

Energy

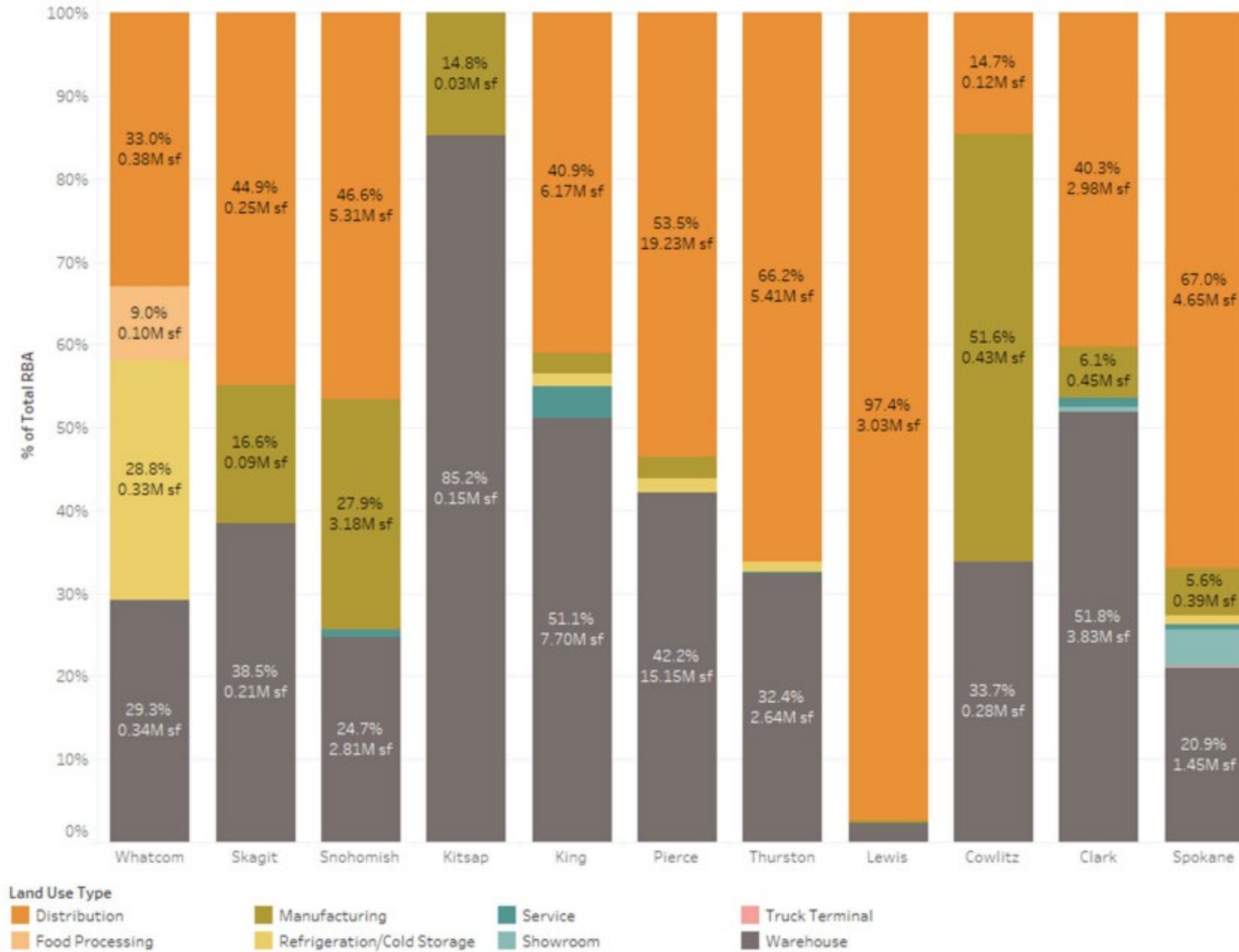
Solar
Batteries
Alternative Fuel Vehicles
Producers: Alta/BP

Recreation

Bikes
Kayaks
Gear

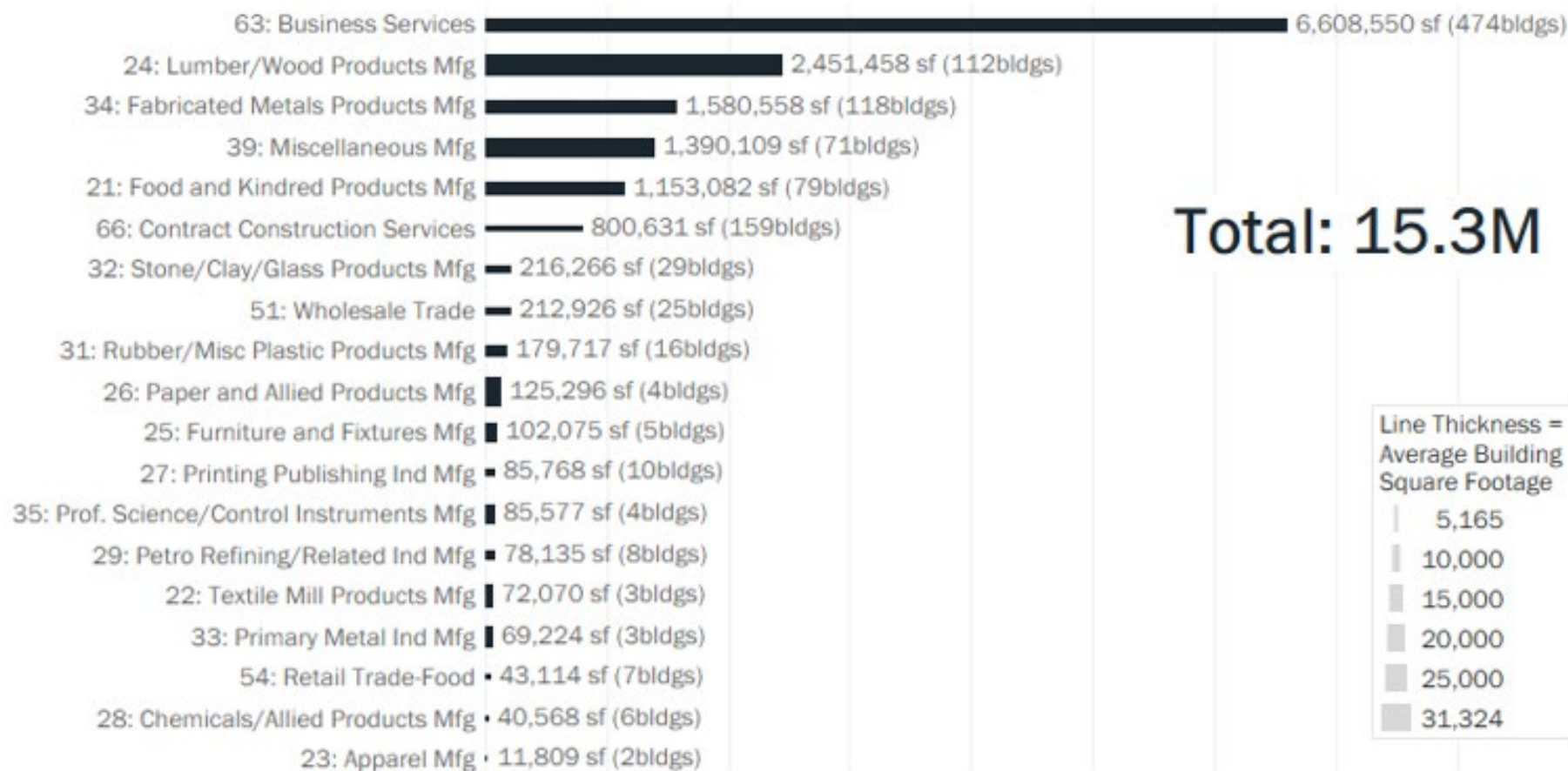


Figure 3-8 Industrial Buildings Built after 2010 by Type



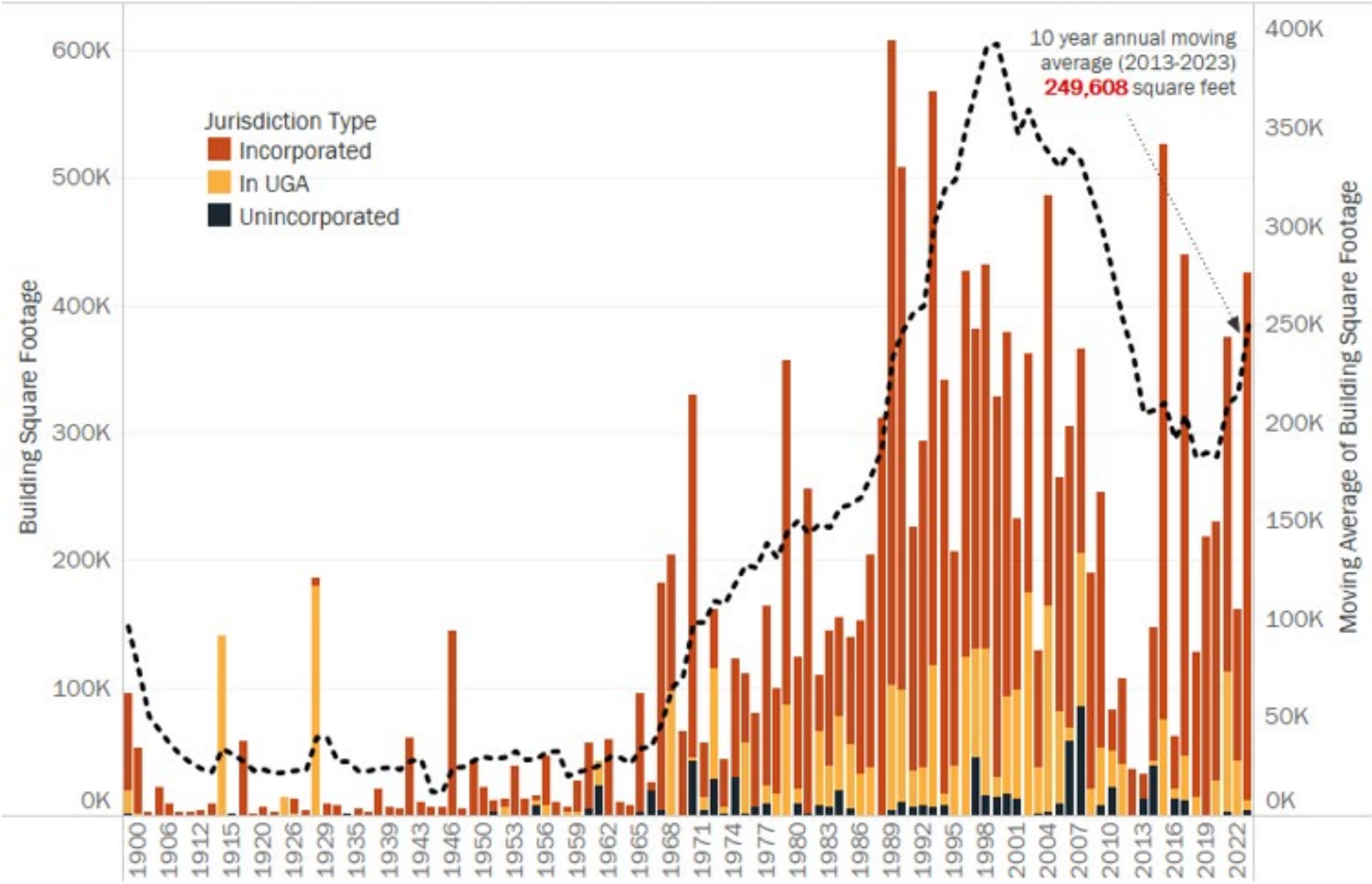
Whatcom County Industrial Landscape

Industrial Building Square Footage by Primary Use Code



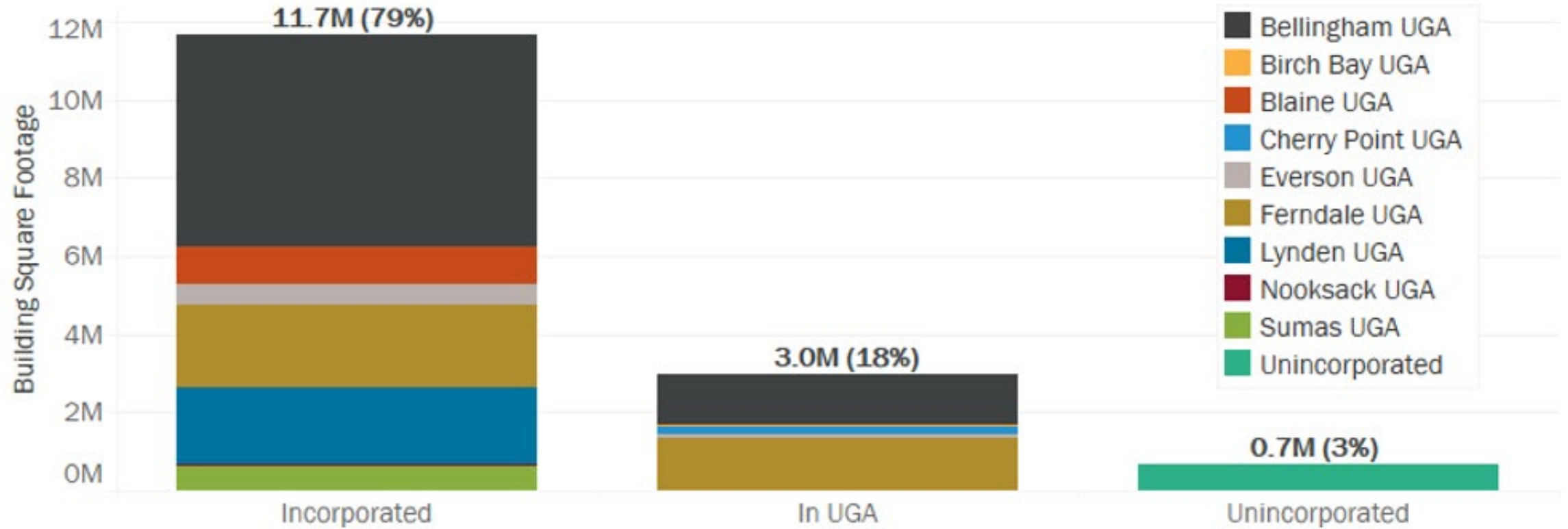


Annual New Industrial Building Square Footage Construction Trends





Industrial Building Square Footage by Jurisdiction Type





Regulatory Consistency



NEXT

Industrial Land Use – Allowed Uses Crosswalk

Bellingham	Blaine	Ferndale	Lynden	Sumas	Everson	Nooksack	Whatcom County
Heavy Industrial Permitted	AP Other Permitted	GB Commercial Conditional	CSL Commercial Conditional	I Industrial Permitted	C Commercial Conditional	CD Commercial Conditional	AO Industrial Conditional
Light Industrial Permitted	CB - W Mixed Use Conditional	LI Industrial Conditional	CSR Commercial Conditional	MW Commercial Conditional	R Residential Conditional	CM Commercial Conditional	CP Industrial Conditional
Marine Industrial Permitted	GW Commercial Conditional	M Industrial Permitted	IBZ Industrial Conditional		LI Industrial Permitted	LI Industrial Permitted	GM Industrial Permitted
Planned Commercial Conditional	HC Commercial Conditional		ID Industrial Permitted				HII Industrial Permitted
Planned Industrial Permitted	M Industrial Permitted		Medical Services Overlay Conditional				LII Industrial Permitted
	MPR Other Conditional						PUD Mixed Use Permitted
							RF Other Conditional
							RGC Other Conditional
							RIM Industrial Permitted
							STC Commercial Conditional
							WRP Other Conditional

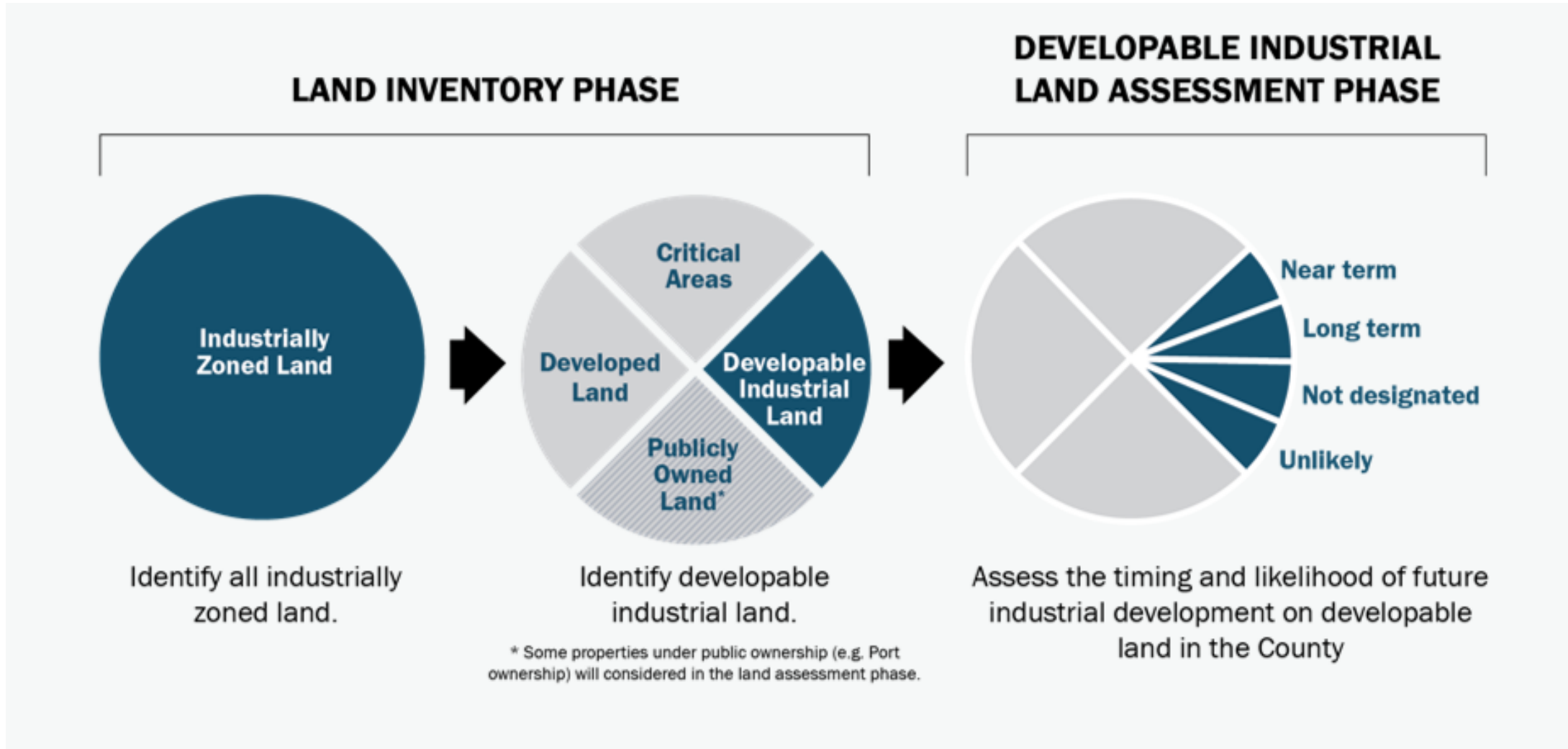
An aerial photograph of an industrial area, featuring large warehouse-like buildings, parking lots filled with cars, and surrounding greenery. In the background, a range of mountains is visible under a clear sky. The image has a blue tint and a semi-transparent dark blue overlay at the bottom.

Developable Industrial Lands



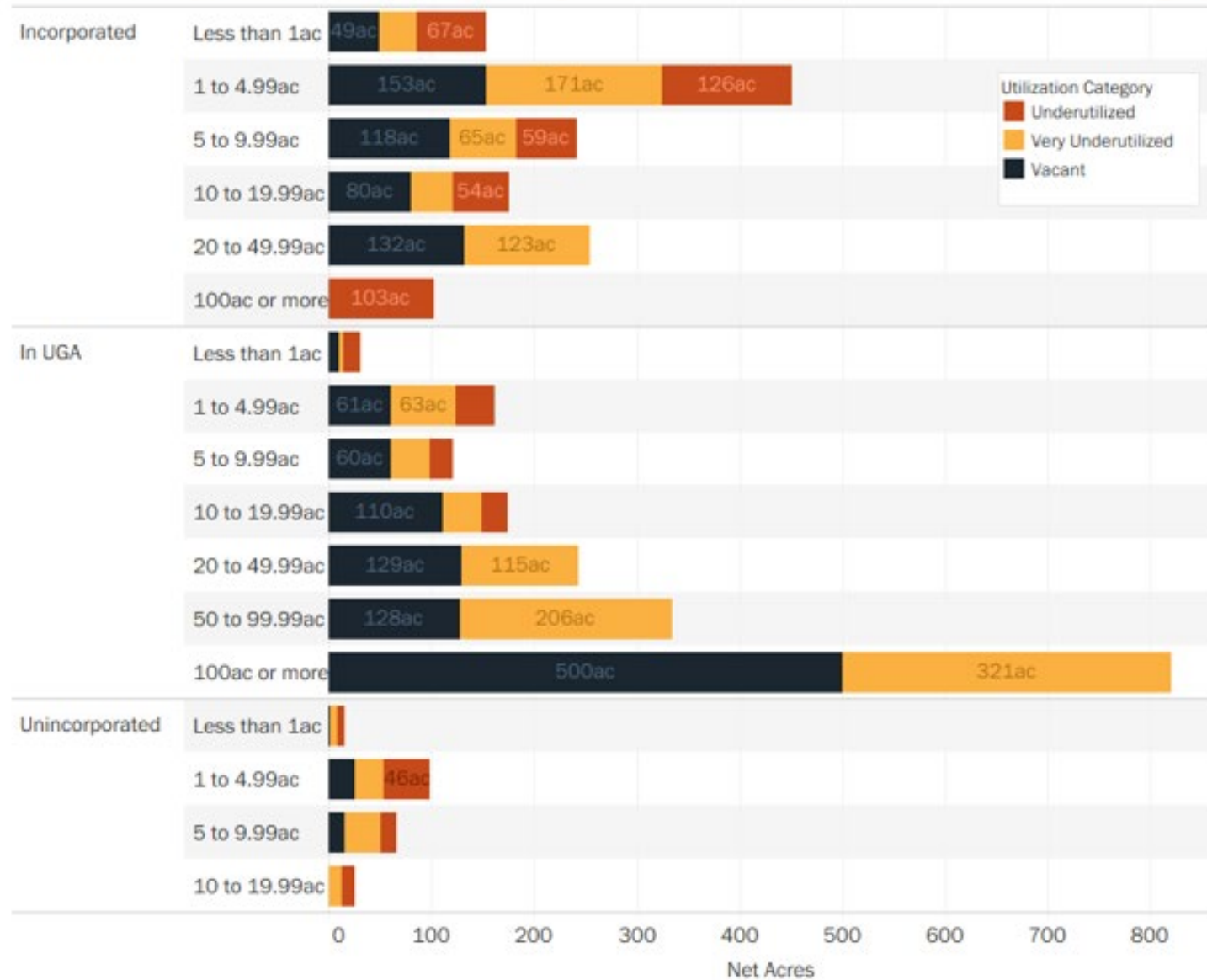
NEXT

Developable Industrial Lands



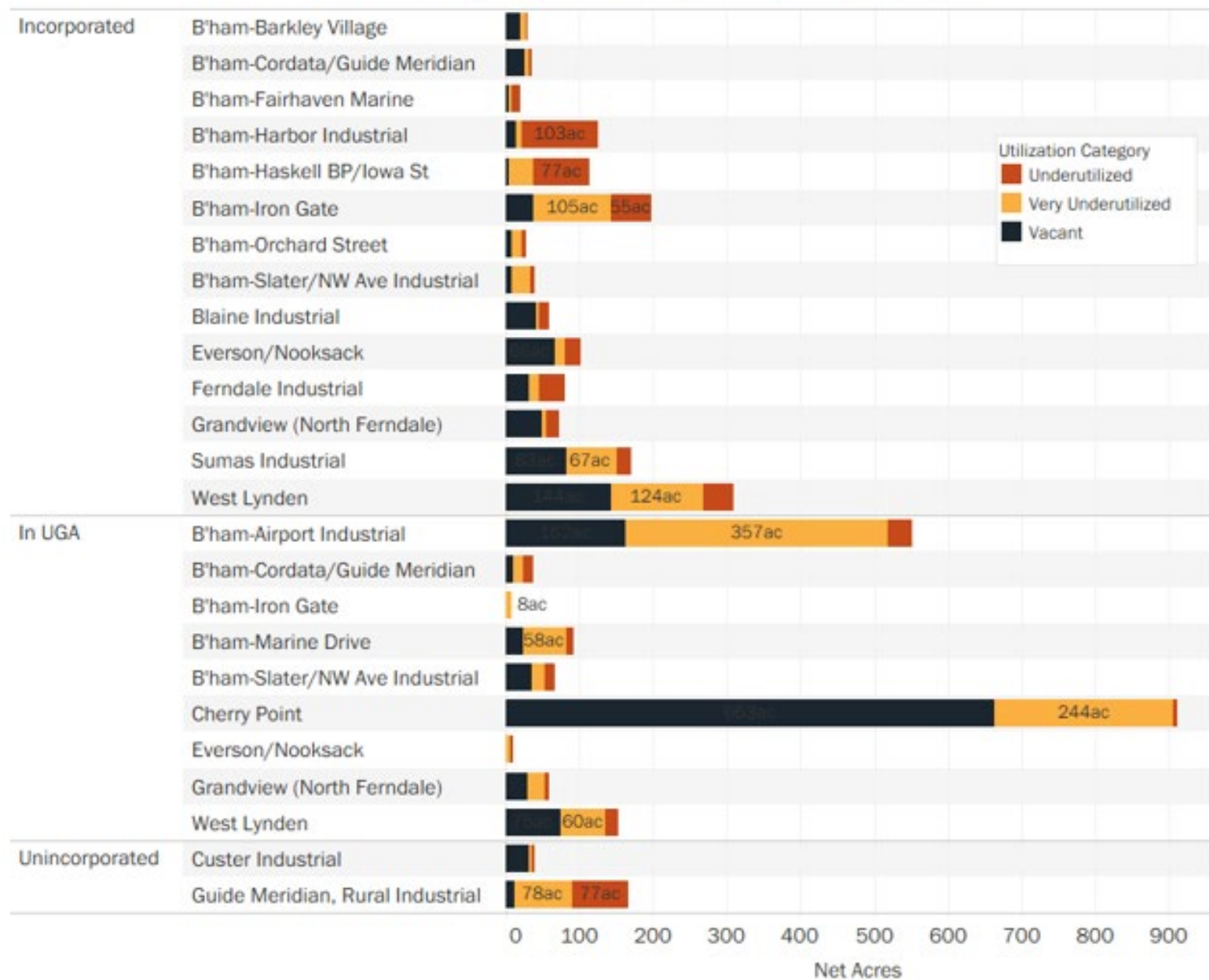


Net Developable Industrial Acres by Jurisdiction Type and Utilization Category

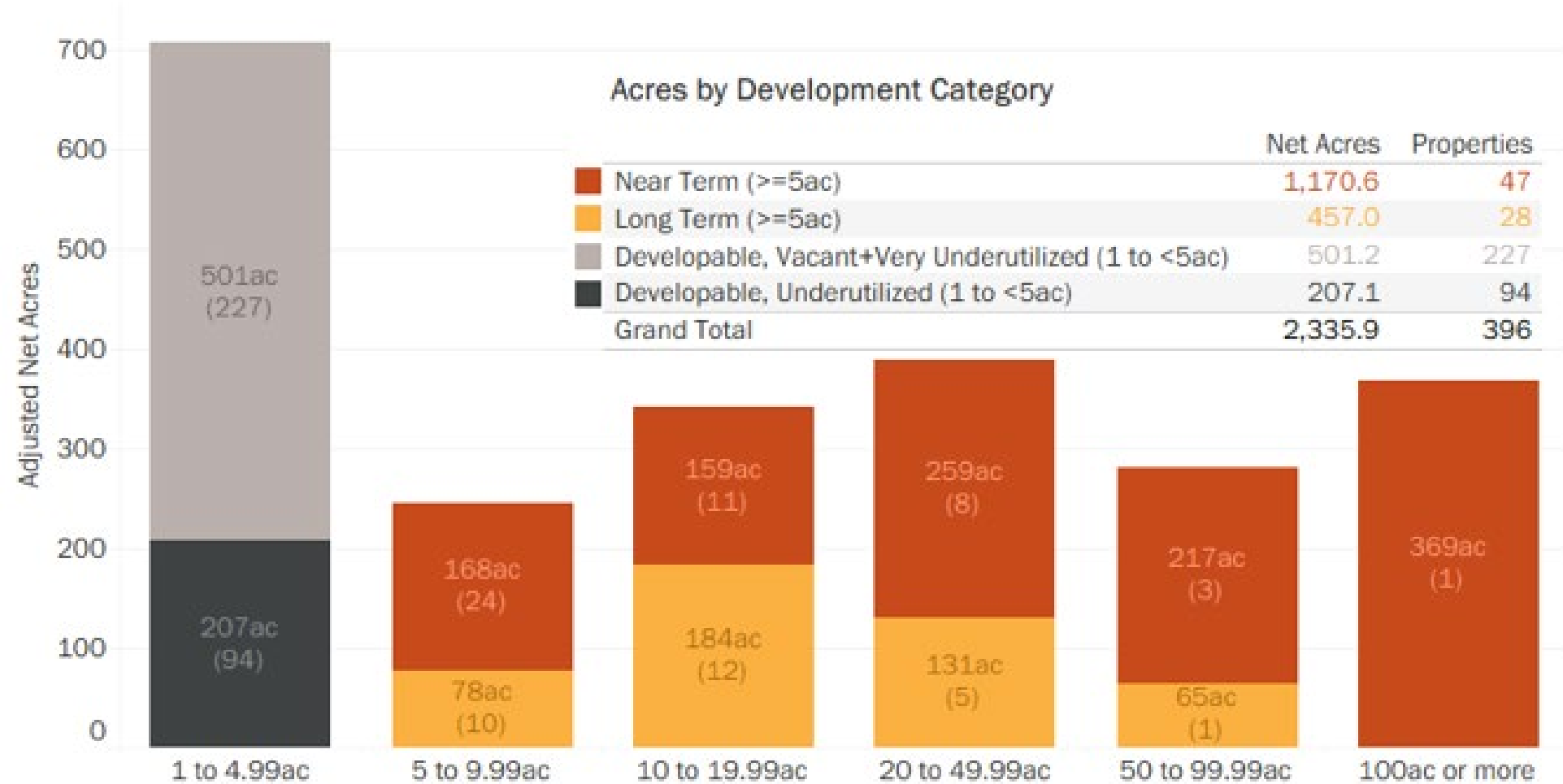




Net Developable Land by Industrial District



Net Acreage and Property Count of Developable Properties by Property Size





Net Acreage of Developable Properties by Industrial Area, along a Freight Corridor, Proximate to an I-5 Interchange, and Fully Served

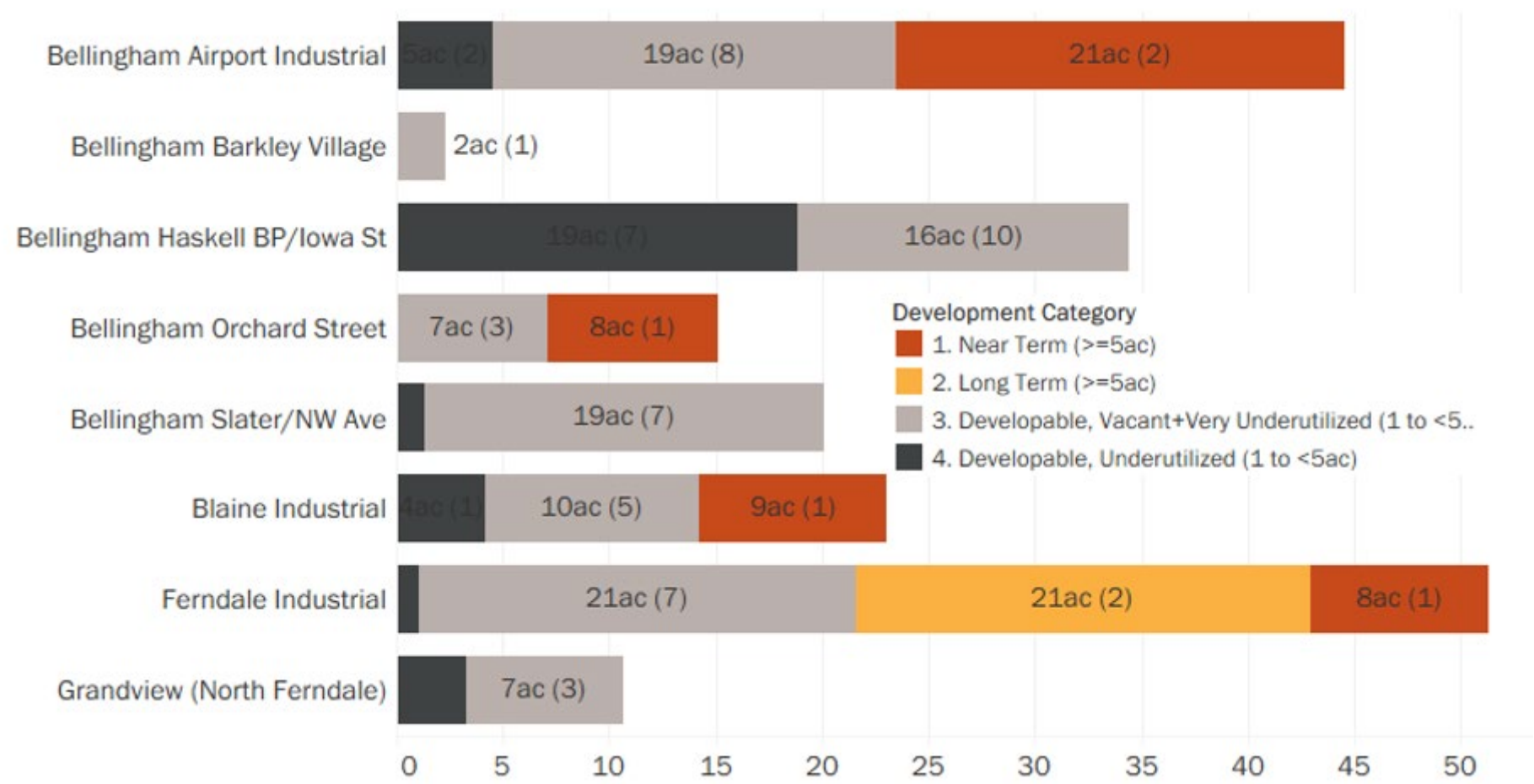
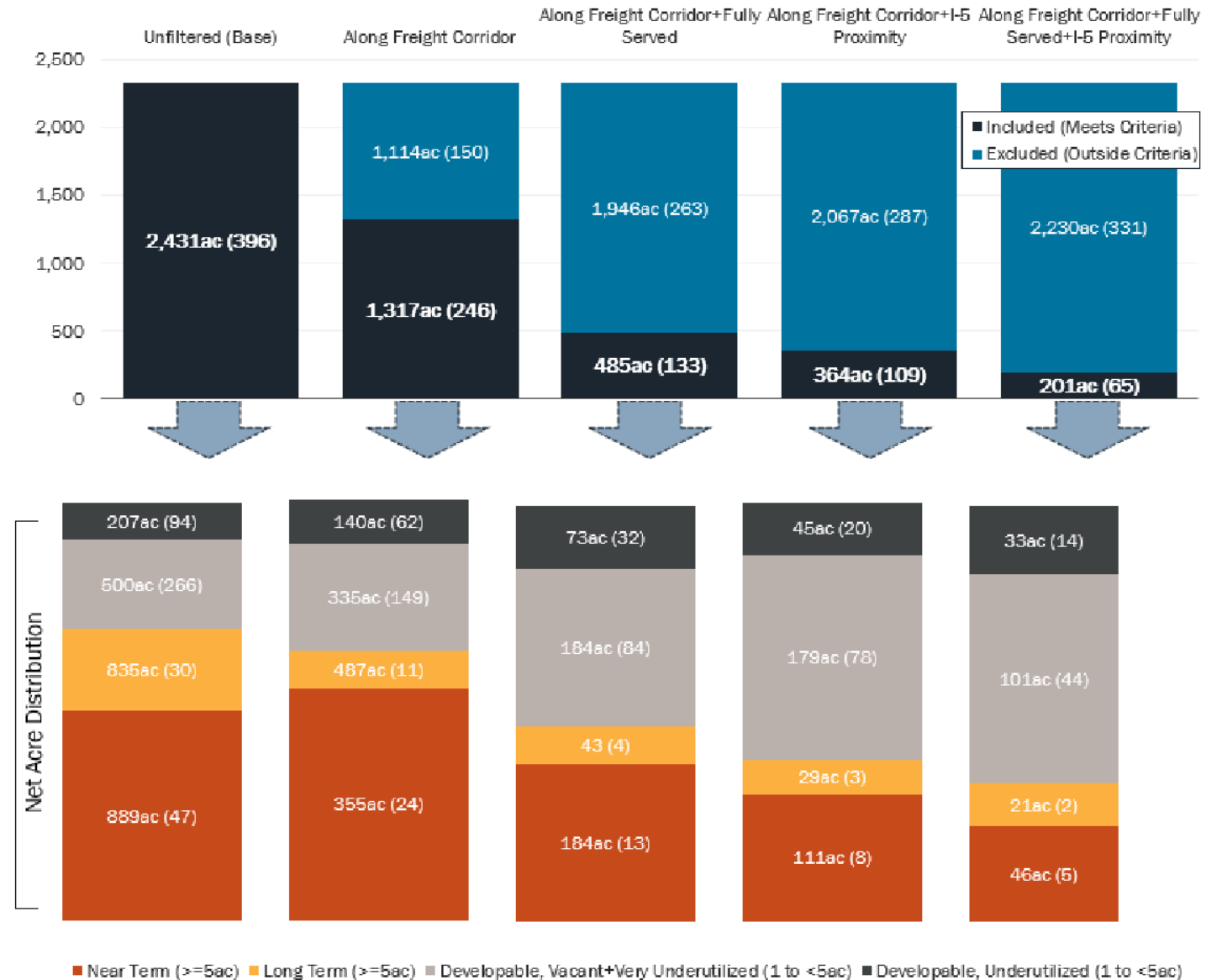




Figure 4-11 Summary of Land Inventory and Developable Industrial Land Assessment



An aerial photograph of a city landscape, featuring a large parking lot, a large open field, and a dense forest. In the background, there are mountains and a body of water. The image is overlaid with a semi-transparent blue filter.

Report Findings



NEXT

Report Findings

Projected Land Needs for Industrial Growth

	Scenario 1 Middle	Scenario 2a Middle-High	Scenario 2b Middle-High	Scenario 3 High
Employment Growth				
Industrial Job Growth (2023-45)	6,333	8,438	9,892	13,599
Manu Job Growth (2023-45)	2,251	3,563	5,238	8,279
T&W Job Growth (2023-45)	561	850	911	1,277
Building Needs				
Industrial Bldg Sq Ft Needed	6,649,990	8,860,354	10,386,402	14,278,960
Manu Bldg Sq Ft Needed	1,687,883	2,704,847	3,701,895	5,765,037
T&W Bldg Sq Ft Needed	1,159,928	2,134,749	2,258,274	3,173,072
Other Industrial Bldg Sq Ft Needed	3,802,180	4,020,758	4,426,233	5,340,851
Sq Ft Built/Year (2023-45)	302,272	402,743	472,109	649,044
Land Needs				
Industrial Acres Needed	587	782	917	1,261
Acres Needed per Year	26.7	35.6	41.7	57.3

Notes

Bldg = building.

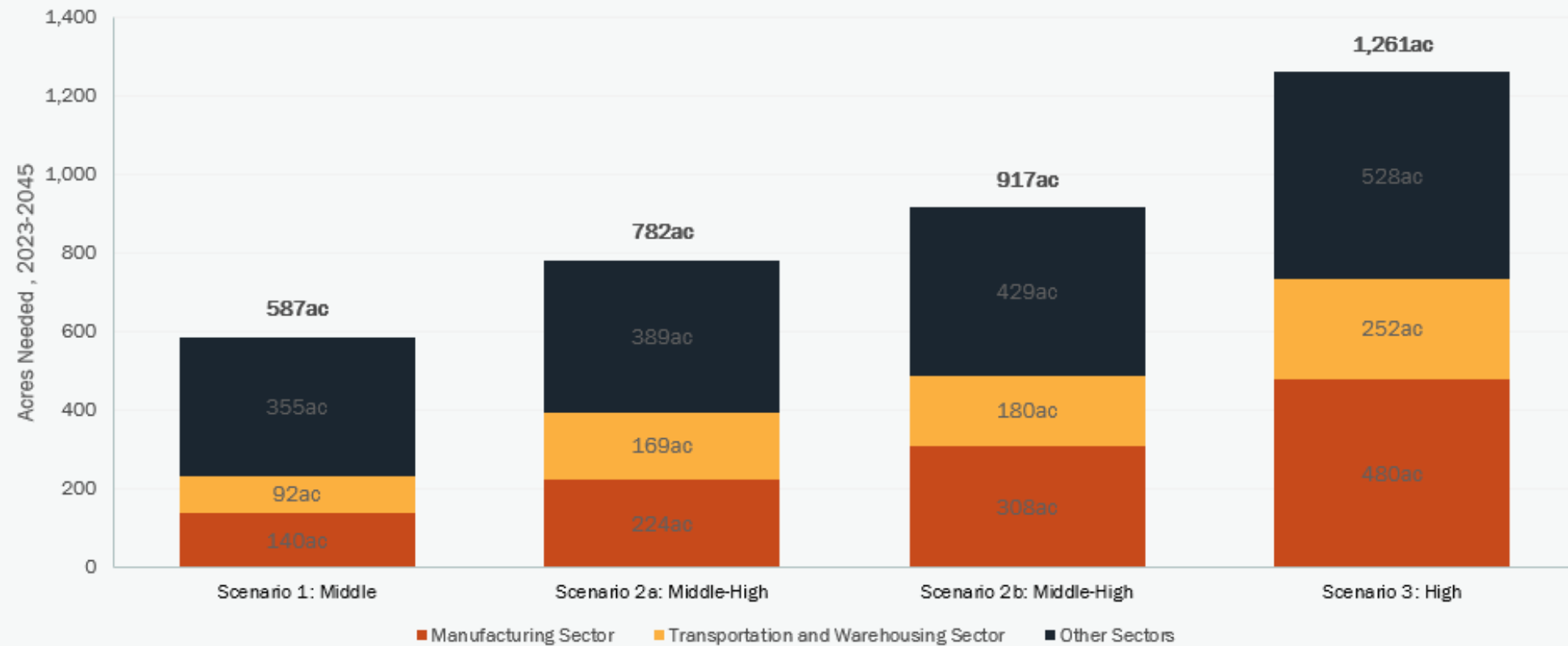
Manu = Manufacturing.

T&W = Transportation and Warehousing.

Sq Ft = square feet.

Report Findings

Industrial Acre Needs by Sector, 2023-2045





Report Findings

- Total industrial land supply meets projected demand based on scenario 2b.
- The quality of industrially zoned land, from the perspective of an industrial user, is a greater challenge (Freight access, rail access, utilities, wetland mitigation)
- Fully served industrial land along freight corridors does not meet projected demand based on scenario 2b.
 - At 485 acres, this key profile of land will not meet the 782 to 917 acres of industrial land needed to support employment projections.
- The industrial land supply is further challenged by a lack of properties in the county that could accommodate large-scale manufacturers (> 30 acres).





Report Strategies

- To meet the projected industrial employment growth between 782 acres and 917 acres will be needed (Currently at 485 acres). To meet this demand the land supply should be:
- Be concentrated along truck freight corridors that connect industrial areas to the Interstate 5 (I-5) corridor.
- Include a concentration of ready-to-develop industrially zoned properties within one-half-mile of an I-5 interchange
- Have properties available that are at least five acres in area, including a ready set of properties totaling 20 or more acres for major industrial users.
- Be the focus of coordination among local jurisdictions, the Port, and utility providers to ensure properties are ready for development with water, sewer, and power service





Recommendations

Wetland Mitigation Banking



Coordinating Port with Local Jurisdictional Planning for Infrastructure

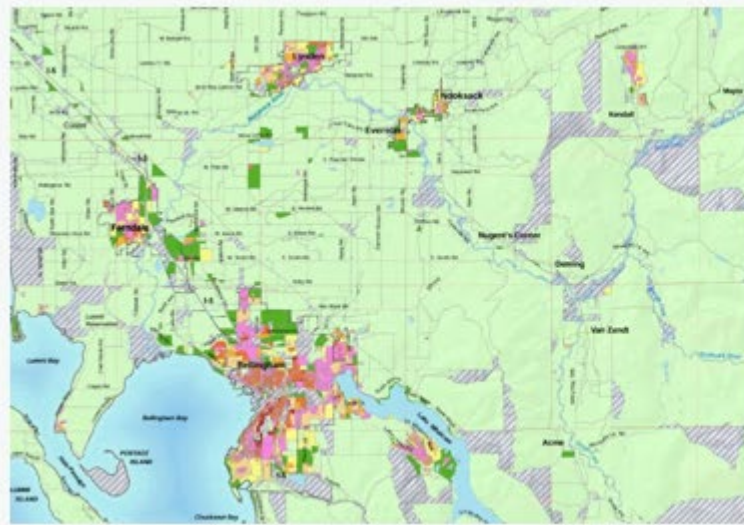


Improving and Extending Truck Freight Corridors



Recommendations

Facilitating Regulatory Consistency



Land for Emerging and Growing Target Industry Businesses



Active Comprehensive Planning



Industrial Land Study Links

Industrial Land Study, Tableau:

<https://public.tableau.com/app/profile/hoffma52/viz/PoBIndLands/IndustrialAreas>

Industrial Land Study, County Comparison, Tableau:

https://public.tableau.com/app/profile/hoffma52/viz/CountyComparison_17539844493090/Story



Questions/Comments: Contact Tyler Schroeder
Tylers@portofbellingham.com