Whatcom County Industrial Lands Study

Whatcom County, Washington

Prepared for Port of Bellingham

Prepared by

MAUL FOSTER ALONGI

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Prepared for:
Port of Bellingham
Bellingham, Washington
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The material and data in this report were prepared under the supervision and direction of the undersigned.

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Abbreviations

BESS.....battery energy storage system

BIA.....Bellingham International Airport

BLA.....Buildable Lands Analysis

County.....Whatcom County

DEIS.....draft environmental impact statement

FAR.....floor area ratio

FGTS.....Freight and Goods Transportation System

GMA.....Growth Management Act

I-5.....Interstate 5

IDD.....industrial development districts

LCA.....Land Capacity Analysis

NAICS.....North American Industry Classification System

Port.....Port of Bellingham

RCW.....Revised Code of Washington

UGA.....urban growth area

Executive Summary

The Port of Bellingham (the Port) initiated a study to better understand key market dynamics to support the growth of existing manufacturing businesses in Whatcom County and enhance competitiveness for new opportunities. This includes trends shaping the current industrial real estate landscape, developments in strategic industries that influence land positioning, and the status of industrial land supply in relation to various future employment projections. As Whatcom County's designated Associate Development Organization, the Port also leads the Regional Economic Partnership. This initiative focuses on retaining and attracting livable-wage jobs, while supporting businesses, entrepreneurs, and local organizations in achieving long-term success. This study aligns with the Port's mission to promote sustainable economic development, optimize transportation gateways, and manage publicly owned land and facilities to benefit Whatcom County.

This report comes at an important point in time as Whatcom County finalizes its 2025 Comprehensive Plan Update. The goal of this study is to determine whether there is a sufficient industrial land base to help existing Whatcom County-based manufacturing sector businesses grow and new manufacturing sector businesses locate in the County over the next 20 years.

APPROACH

The study focused on the following key objectives:

- Understand key manufacturing industries in the county and the trends influencing how those industries use land.
- Provide a baseline of current industrial land use by assessing the historical industrial building trends and related land consumption as well as how much industrially zoned land remains in the county.
- Assess the quantity and quality of net developable industrially zoned land in the county overall and in 19 industrial areas.
- Project industrial employment growth through 2045 and estimate the land needed to support anticipated employment growth.
- Balance anticipated future industrial land needs with the net developable land current in the county.

SUMMARY FINDINGS

Industrial Land Supply

There are approximately 15,095 acres of industrially zoned land in Whatcom County. After deducting land that is developed and critical areas that impede development, there are approximately 3,387 acres of net developable land (either vacant, very underutilized, or underutilized) currently zoned for industrial use. However, after applying more site-specific analyses that consider zoning constraints, existing uses, critical areas, and inhibiting property-level characteristics as well as removing properties under one acre from the set, the total is reduced to 2,431 net acres. These properties represent the industrial land supply with development potential that may accommodate future industrial employment growth.

This refined inventory includes 889 acres designated for near-term development (potential for development within the next five years.), 835 acres for long-term development (development more likely to occur in more than 10 years), 500 acres in the 1-to-4.99-acre range that are vacant or very underutilized (properties with near-term development for smaller industrial projects), and 207 in the 1-to-4.99-acre range that are vacant or very underutilized (improved properties long-term redevelopment potential for smaller industrial developments).

Industrial Employment Growth Scenarios

Four industrial employment growth scenarios were modeled rooted in the Whatcom County middle, middle-high, and high

employment growth projections used in its draft Environmental Impact Statement (DEIS) for its 2025 Comprehensive Plan Update. Based on this modeling, the total acres needed to support the industrial employment growth scenarios between 2023 and 2045 range from 587 acres under Scenario 1 to 1,261 acres under Scenario 3. The two middle scenarios are rooted in the County's middle-high growth scenario and represent the more likely range of industrial employment growth. The resulting industrial land supply needed to support growth between 2023 and 2045 for Scenarios 2a and 2b is between 782 and 917 acres.

Reconciliation

Based on a tally of acreage, there appears to be an ample supply of industrial land in the county. However, a closer evaluation of the conditions of the land highlights persistent challenges with the industrial land supply.

The estimated 889 acres of industrially zoned land with near-term development potential exceed the identified need of between 782 and 917 acres needed to support growth between 2023 and 2045. When applying a conservative market factor (percentage of owners that may not act on an offer to sell) of 20 percent, the resulting acreage of 711 acres is under the targeted demand for industrial land. However, when including excludes properties with longer-term potential and land under five acres in area the anticipated demand can likely be met.

The quality of industrially zoned land, from the perspective of an industrial user, is a greater challenge for meeting anticipated needs than the quantity of land. The land supply in the county does not have enough ready land to support target industries. Almost all industrial users rely on transportation corridors that can reliably move freight. Truck corridors are the primary, and most flexible, mode for accessing near and long-distance supply chain connections and distribution, markets followed by rail and waterways. Another key factor is utility readiness for connecting to water, sewer, and power service. The following observations underscore the challenge with meeting the estimated industrial employment growth needs:

- **Industrially zoned properties along a freight corridor:** There are 1,317 acres on 246 properties along a freight corridor. Of this total, 355 net acres on 35 properties totaling at least five acres have near-term potential and meet this criterion. 335 acres on 149 properties are under five acres and are vacant or very underutilized.
- **Industrial zoned properties along truck freight corridors and fully served:** This profile of industrially zoned land represents locations where industrial users and industrial developers will gravitate. 485 acres on 133 properties are along freight corridors and fully served with water, sewer, and power utilities. Within this set, there are only 184 acres on 13 properties that are at least five acres. At 485 acres, this key profile of land will not meet the 782 to 917 acres of industrial land needed to support employment projections.
- **Industrially zoned land for large scale users:** Industrial users seeking land over 30 acres along a truck freight corridor have limited options, especially if the user is seeking land with near-term development potential. There are four properties that meet these criteria, however, only one has access to power, water, and sewer service. It is important that there is a mix of industrial land for the full range of target industry users including smaller and emerging businesses to large-scale industrial manufacturers.

Appendix F provides maps and property level insights for each industrial area in the county.

Additionally, there are two interactive web-based tools available:

- **Industrial Area Mapping Tool** (https://public.tableau.com/app/profile/hoffma52/viz/PoBIndLands/IndustrialAreas)
- **County Comparison Dashboard** (https://public.tableau.com/app/profile/hoffma52/viz/CountyComparison_17539844493090/Story)

SUMMARY OF RECOMMENDATIONS

To meet the projected industrial employment growth scenarios, between 782 acres to 917 acres will be needed to accommodate the projected growth between 2023 and 2045. To meet this anticipated demand for industrial land the Port should ensure that the land supply:

- 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.

Key recommendations to support a ready industrial land base are:

- **Wetland Mitigation Banking:** Nearly half (48 percent or 7,190 gross acres) of industrially zoned land in Whatcom County has a wetland and an associated buffer that cannot be developed. The top three most impacted industrial areas are Cherry Point (3,293 acres), Bellingham Airport Industrial (1,033 acres), and Bellingham Slater/NW Ave (479 acres). Approximately 57 percent (2,667 acres) of the City of Bellingham's 4,674 gross acre industrial land base is impacted by wetlands. The City of Bellingham owns approximately 100 acres of property in the Bellingham Slater/NW Ave industrial area that is identified to be a wetland mitigation bank. This bank may be used to unlock industrial development potential on other properties in Bellingham impacted by wetland. In coordination with jurisdictional partners, the Port should advance the exploration of wetland mitigation banking in the City and Bellingham and other parts of the county
- **Coordinating Port Powers with Local Jurisdictional Planning for Infrastructure:** The Port and the county jurisdictions, individually or in coordination, should proactively construct utility extensions to industrial areas lacking service. For example, the Port can establish industrial development districts (IDDs). These are geographic districts comprising idle and underutilized lands where the Port can acquire, plan and develop, and sell properties. Additionally, the Port can make infrastructure improvements consistent with jurisdictional planning that may be financed with bonds or an IDD levy. The Port may review the status of the current IDDs and consider the creation of new IDDs in industrial areas where infrastructure construction will support new development.

  Cities also construct extensions using their financing tools including Latecomers agreements or Local Improvement Districts. Cities may also prepare subarea plans and related planned action ordinances that remove administrative hurdles for private development and make industrial land in these areas more marketable.

  A Washington State Department of Commerce Community Economic Development Board planning grant would support the assessment of infrastructure needs with each utility provider and associated delivery costs as well as the feasibility and impact that a subarea may have on the timing of development. Industrial areas that may benefit from this type of action include Grandview (North Ferndale), Cherry Point, West Lynden, Sumas, and Bellingham Irongate.
- **Improving and Extending Truck Freight Corridors:** Of the properties totaling at least five acres, 882 acres are not along a truck freight corridor but are in an industrial area. Cherry Point, West Lynden, Sumas, and Everson/Nooksack have at least 60 acres of land not along a truck freight corridor. Cherry Point and West Lynden each have over 200 acres. Every two years the Washington State Department of Transportation designates and updates the Freight and Goods Transportation System. The purpose of the update is to classify multimodal freight corridors for trucks, rail, and waterways based on annual freight tonnage, which is used to support transportation planning processes and inform freight investment decisions. This is mandated by state legislative requirements. The Port should actively coordinate

with the Whatcom Council of Governments, the county lead for this effort, to ensure that industrial areas have reliable truck corridors to meet future demand. A map showing land that is along, and not along, truck freight corridors can be found in Appendix D.

- **Facilitating Regulatory Consistency:** Collaborate with the County and local jurisdictions to clarify industrial land uses in zoning districts designated for industrial development. This process involves eliminating nonindustrial uses permitted by right in each industrial zone, as well as uses categorized as industrial that do not contribute high-demand or high-wage jobs or align with target industries. Additionally, the Port may recommend regulatory changes aimed at ensuring greater consistency among the County and jurisdictions regarding industrial project code review and permit approval processes.
- **Land for Emerging and Growing Target Industry Businesses:** In addition to ensuring a supply of ready industrial land that is at least 20 acres for large-scale industrial users, properties that are in the one-to-five-acre range are an important part of the industrial land mix. While these properties are not likely to attract large-scale manufacturers and institutional industrial developers; these properties play a vital role in supporting emerging and growing industrial operations that are essential to the county's manufacturing ecosystem. Cities may facilitate industrial development on developable properties through continued accessible data sharing to provide readily available due diligence information. The Port may be proactive with these property owners by levering its brownfield knowledge base and/or conducting surveys to understand willingness to listen to sale offers or explore redevelopment options.
- **Active Comprehensive Planning Involvement:** The Port should continue to be an active participant in the comprehensive planning and land use modification process, whether it be for adding land into the industrial land base or protecting land that is being considered for redesignation from industrial use. The Port should support land use changes and UGA expansions that facilitate industrial development including the following:
  - Along I-5 between the north end of the Ferndale UGA and Bellingham including the area east of I-5 between the Grandview (North Ferndale) industrial area and the Ferndale industrial area.
  - South and east of the south end of the Blaine UGA, acknowledging that wetland mitigation will be needed.
  - The area northeast of the Columbia Valley UGA, which could support small-scale industrial development or resource-based industries.
  - Ferndale, east of I-5 in the Grandview (North Ferndale) industrial area.

1. Introduction

1.1 BACKGROUND

The economic base in Whatcom County is unique to the rest of Washington state with its abundant natural resources, major international border crossing, robust maritime industry, and growing energy sector. The Port of Bellingham (Port) seeks to understand trends influencing the current industrial real estate market, trends in key industries that will influence how to position land so that it is attractive, and the current state of the industrial land supply relative to a range of future industrial employment projections. This study will help the Port, as the Whatcom County Associate Development Organization, identify properties with near-term development potential, prioritize areas for investment, and advocate for industrial policies to help make the county attractive to industrial development. This analysis can be used to inform Whatcom County (County) as it finalizes its 2025 Comprehensive Plan Update as mandated by the Washington State Growth Management Act (GMA) under Revised Code of Washington (RCW) Section 36.70A.130.

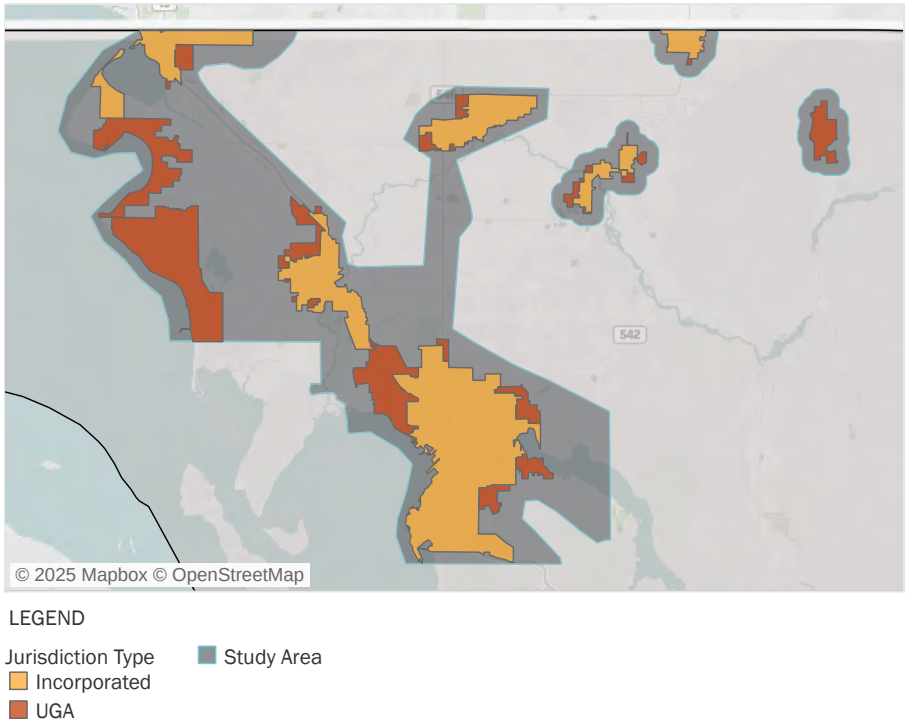
1.2 PURPOSE

The purpose of the study is to determine whether an adequate supply of industrial lands exists to accommodate future demand-based employment projections. The study covers a review of existing industrial land supply, economic trends, industrial land policy, and how industrial employment growth scenarios may influence industrial land use over the next 20 years. The growth scenarios will be accompanied by recommended changes to policies and regulatory requirements. The findings from this report will help the Port identify and prioritize potential areas for infrastructure investment and zoning modifications.

1.3 AREA OF STUDY

The area of study includes the industrial land located in and just outside of the county's ten urban growth areas (UGAs) and the incorporated jurisdictions within each UGA. The map in Figure 1-1 depicts the area of study featuring the land that is within incorporated cities in a UGA and the unincorporated land outside of a UGA.

Figure 1-1. Area of Study



1.4 RELEVANT GROWTH MANAGEMENT ACT-RELATED STUDIES

The area of study includes the industrial land located in and just outside of the county's ten urban growth areas (UGAs) and the incorporated jurisdictions within each UGA. The map in Figure 1-1 depicts the area of study featuring the land that is within incorporated cities in a UGA and the unincorporated land outside of a UGA.

1.4.1 Land Capacity Analysis

Overview

An LCA, established under RCW 36.70A.115, is also tied to the comprehensive planning process. Although the BLA and LCA share similar data collection and analysis processes, the two practices have separate outcomes.

- The BLA is intended to evaluate existing conditions. It measures the difference between current data and comprehensive planning assumptions.
- The LCA is intended to evaluate future needs. It assesses whether there is sufficient land capacity on land suitable for development when comprehensive plans and development regulations are updated.
- The County completed its most recent LCA in 2016 as a part of the 2016 Bellingham comprehensive plan periodic update process (County 2016).

Whatcom County Land Capacity Analysis

County planning staff developed and completed the LCA, with support from each city, to estimate each UGA's capacity for population and employment growth during the 20-year planning period as part of the 2016 comprehensive plan updates. The LCA found there to be sufficient net developable commercial and industrial land capacity to support anticipated employment growth in the county overall. Two UGAs, Ferndale and Lynden, identified a deficit. Ferndale's employment lands were estimated to support 3,807 jobs while the area's employment allocation was 4,000 jobs (a 193-job deficit). Lynden was projected to support 2,157 new jobs during the 20-year planning period but had enough land to support only 1,694 jobs (a 463-job deficit). The LCA did not isolate land capacity for industrial jobs specifically.

1.4.2 Buildable Lands Analysis

Overview

Counties in Washington must conduct an LCA and a BLA as part of the periodic update of their comprehensive plan. The review and evaluation program under the RCW 36.70A.215 requires seven Washington counties (including Whatcom County) to complete a BLA every ten years to inform periodic countywide comprehensive plan updates. The BLA assesses the following comprehensive planning elements:

- Determine whether a county and its cities are achieving required urban densities.
- Identify reasonable measures, other than adjusting urban growth areas, that will be taken to comply with urban density requirements.
- Truth-test growth and development assumptions and targets in county-wide planning policies and the county and city comprehensive plans with current data on actual development patterns.

Whatcom County Buildable Lands Analysis

Whatcom County adopted its most recent BLA report on March 21, 2023, in support of its upcoming comprehensive plan update, which is required to be completed by December 2025. The 2023 BLA compared recent development data in the cities and UGAs with the planning assumptions, targets, and objectives adopted in the County's planning policies. It also assessed how much land is available to serve future growth and whether that amount is sufficient to accommodate expected growth. Note that the BLA includes industrial land in the broader "employment lands" category, which also includes commercial land. The report identified the following buildable land trends in the county:

- From 2016 to 2021, new commercial and industrial construction in Whatcom County and the cities accommodated an estimated 17 percent of the projected employment growth for the 20-year planning period and will need to accommodate another 26,829 jobs by 2036.
- Actual commercial and industrial densities are lagging behind planned densities in several small cities.
- On a countywide basis, surplus capacity exists to accommodate employment growth for the rest of the 20-year planning period through 2036.

A related technical memorandum prepared for Whatcom County in February 2022 outlines recommended methods for meeting the state BLA requirements. Included in this background document is an analysis on industrial building square feet per employee, a key input for calculating land needs based on employment projections. Table 1-1 summarizes the output from this assessment.

Table 1-1. 2020 Whatcom County Square Foot Per Job Summary by Grouped Areas

Analysis Area	Adjusted Average Industrial Sq Ft/Job	Adjusted Median Industrial Sq Ft/Job
Bellingham UGA	974	661
Small City UGAs	1,097	795
Non-City UGAs	1,513	1,326
Small City & Non-City UGAs	1,118	812
All UGA Areas	1,035	718
Rural Areas	1,039	717
All Whatcom County	1,036	717

Notes
Industries included in the industrial employment category include construction (NAICS 23), manufacturing (NAICS 31-33), transportation and warehousing (NAICS 48-49), and utilities (NIACS 22).
NAICS = North American Industry Classification System.
Sq Ft/Job = industrial building square feet per job.
UGA = urban growth area.

Source
Community Attributes, Inc. 2022. *Whatcom County Review and Evaluation Program Methodology*. Seattle, Washington. February.

1.4.3 Comprehensive Planning

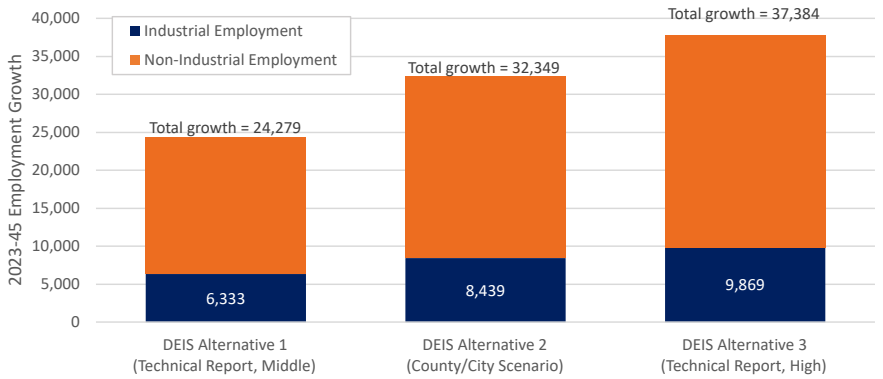
The GMA requires Whatcom County to revise its comprehensive plan and development regulations by December 31, 2025. To support this, the County published two documents that present total employment and industrial employment projections for the period between 2023 and 2045.

The documents are:

- Population and Employment Projections technical report prepared in May 2024
- Draft Environmental Impact Statement (DEIS) from the comprehensive plan issued April 2025.

The technical report presents low-, medium-, and high-growth scenarios for total employment and industrial employment for the county and by UGA. The DEIS assesses the technical report's medium-growth scenario (DEIS Alternative 1) and high-growth scenario (DEIS Alternative 3). A middle alternative, the County/City multi-jurisdictional resolution scenario (DEIS Alternative 2), is also presented. The DEIS was prepared as part of the State Environmental Policy Act review required for the 2025 Comprehensive Plan Update. Figure 1.2 shows the total employment growth scenarios between 2023 and 2045 presented in the DEIS and the portion that is projected to be industrial employment.

Figure 1-2. DEIS Employment Growth Scenarios, 2023–2045



Source: *Whatcom County. 2025. Comprehensive Plan Update Draft Environmental Impact Statement. Bellingham, Washington. April.*

Consistent Metric Observations from the Technical Report and DEIS

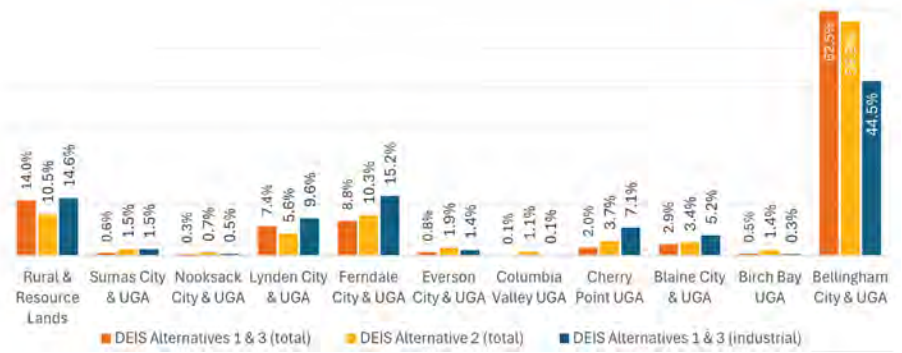
Annual Growth Rates
Employment compound annual growth rates, both total jobs and industrial jobs, are the same for each alternative between 2023 and 2045. Alternative 1: 0.89% | Alternative 2: 1.15% | Alternative 3: 1.33%

Industrial Jobs Capture Rate
The industrial jobs capture rate of total jobs is 26.1%. This metric is used for all alternatives.

The GMA requires that countywide growth projections be allocated between the UGAs. Total employment growth was allocated consistently between DEIS Alternatives 1 and 3; however, the DEIS Alternative 2 allocation is different.

Allocation among industrial jobs was also consistent for Alternatives 1 and 3. No tables showing the UGA allocation for industrial jobs were identified in the DEIS for Alternative 2. The industrial employment allocations among the UGAs are consistent with the 2021 industrial job distribution per the technical report. It is presumed that the industrial job allocations are the same for all three DEIS Alternatives. Figure 1-3 shows the employment allocation rates between the UGAs and Table 1-2 provides the 2023–2045 industrial job growth projections by UGA.

Figure 1-3. Total and Industrial Employment Allocation Rates by UGA



Source: *Community Attributes, Inc. 2022. Whatcom County Review and Evaluation Program Methodology. Seattle, Washington. February.*

Table 1-2. Industrial Employment Growth Allocated by UGA, 2023–2045

Urban Growth Area	DEIS Alternative 1	DEIS Alternative 2	DEIS Alternative 3
Bellingham City & UGA	2,820	3,758	4,395
Birch Bay UGA	22	29	35
Blaine City & UGA	327	436	510
Cherry Point UGA	450	600	702
Columbia Valley UGA	6	8	9
Everson City & UGA	88	117	137
Ferndale City & UGA	961	1,281	1,497
Lynden City & UGA	606	807	944
Nooksack City & UGA	29	39	45
Sumas City & UGA	98	131	152
Rural & Resource Lands	927	1,235	1,445
Total	**6,333**	**8,439**	**9,869**

Notes
The DEIS Alternative 2 allocations are implied and based on the allocation rates used for DEIS Alternatives 1 and 2.
DEIS = Comprehensive Plan Update Draft Environmental Impact Statement.
UGA = urban growth area.

Sources
Leland Consulting Group. 2024. *Population and Employment: Growth Projections and Preliminary Allocations.* Portland, Oregon May 2024.
Whatcom County. 2025. *Comprehensive Plan Update Draft Environmental Impact Statement.* Bellingham, Washington April 2025.

1.5 REPORT OUTLINE

Each major section of this study represents a core component of the analysis. These sections are structured around key questions designed to guide the reader through the study's findings and insights. Together, the information contained in these sections builds a comprehensive understanding of industrial land dynamics in Whatcom County—from current trends and land use patterns to the availability of developable land and the alignment of supply with projected employment growth. A brief description of the report sections, along with the corresponding questions they address, are outlined below.

- **Industrial Sector Trends:** Assesses key industrial sectors in the county and the trends influencing how those industries use land.
  - What are industry trends that may impact how industrial land is used?
  - How does Whatcom County compare to other competitive counties in Washington based on key industrial sector trends?

- **Whatcom County Industrial Landscape:** Provides an understanding of current industrial land use by assessing the historical industrial building trends and related land consumption as well as how much industrially zoned land remains in the county.
  - What are the existing industrial building and land absorption trends in the county?
  - Where can new industrial buildings be built in the county?
- **Developable Land Analysis:** Analyzes the quantity and quality of net developable industrially zoned land in the county overall and in 19 industrial areas.
  - Of identified developable land in each industrial area, how many acres are potentially available, after excluding critical areas that preclude development?
  - What are the defining characteristics of the net developable land areas?
- **Reconciliation Analysis:** Balances anticipated future industrial land needs with the net developable land in the county.
  - Using comprehensive plan employment projections, how many new manufacturing sector jobs are there estimated to be over the next 20 years?
  - Based on historical industrial land absorption trends and manufacturing sector employment projections, is there a sufficient inventory of developable land to support anticipated growth over the next 20 years?
- **Recommendations**: Offers policy and decision-making recommendations to address identified inadequacies of land supply and demand.
  - Based on the findings of the land reconciliation, what strategic actions can the Port and County pursue to advance their industrial development objectives?

2. Industrial Sector Trends

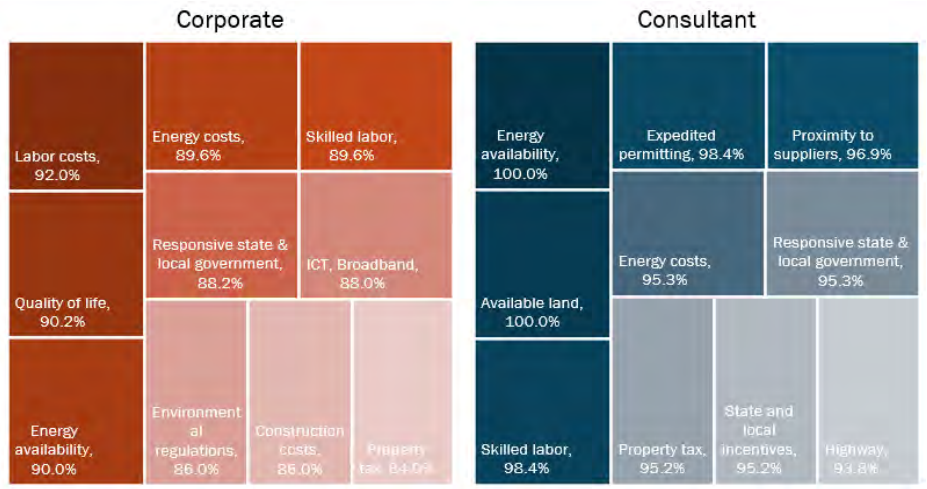
This section presents information that influences industrial land use, particularly for the key industries that the Port is focused on attracting to the county. This is a competitive county comparison that shows how Whatcom County's industrial market relative to the other counties along the Interstate 5 (I-5) corridor and Spokane County.

2.1 INDUSTRIAL SITE SELECTION OVERVIEW

The annual corporate and consultant surveys conducted by Area Development summarize the top trends in nationwide industrial and commercial site selection according to both site selection consultants and corporate executives (Area Development 2025). The surveys provide an understanding of the economic and political conditions that are shaping the commercial development landscape. According to the 2025 survey, corporate leaders and site selection consultants alike report that general economic pressures, labor availability, and business-friendly government programs remain at the forefront of their decision-making processes.

Figure 2-1 shows the top ten site selection factors according to both consultants and corporate leaders. Skilled labor availability, energy availability and costs, and responsive state and local governments are consistently ranked as top site selection factors by both consultants and corporate leaders. While consultants prioritize available land, energy availability, and expedited permitting, corporate decision-makers place greater emphasis on labor costs, quality of life, and construction expenses.

Figure 2-1. Top Ten Site Selection Factors, 2025



Source: *Area Development. 2025. 21st Annual Consultants Survey. Accessed May 22, 2025. https://www.areadevelopment.com/Corporate-Consultants-Survey-Results/q1-2025/39th-annual-corporate-21st-annual-consultants-surveys-what-business-leaders-and-consultants-are-saying-about-site-selection.shtml*

2.1.1 Consultant Results

Site selection consultants play a critical role in guiding business expansion and location decisions, offering valuable insight into the evolving priorities and challenges companies face when determining where to invest. Notably, 92 percent of the 2025 survey respondents are actively engaged in manufacturing projects, underscoring the continued strength of industrial investment. Distribution and warehousing projects are also a strong focus, with over 60 percent of consultant respondents supporting clients in logistics and supply chain growth. Consultants are betting that companies will be needing a domestic presence to avoid tariffs in their supply chain. Despite concerns about tariffs and political uncertainty, the volume of projects being delivered has remained steady, with a growing focus on strategic investments in manufacturing, logistics, and corporate headquarters. The following list reflects the industry trends illuminated by the consultants surveyed:

- The main site selection factors for consultants in 2025 are energy availability, land availability, and skilled labor. The biggest influences on this perspective are political uncertainties related to geopolitical conflict, tariffs, and domestic policy.
- Skilled labor remains the top selection priority, rated as very important or important by nearly all respondents, reflecting persistent labor shortages across sectors.
- Nearshoring and reshoring are also prominent themes in 2025, with many consultants supporting clients in relocating supply chain operations from Asia to Mexico, Canada, or the U.S.—a reflection of ongoing efforts to diversify and stabilize supply chains.
- More than half of the consultants surveyed are working on projects expected to generate over 1,000 jobs, reflecting a modest increase from last year and suggesting a continued trend toward larger-scale investments despite ongoing economic uncertainty.
- Compared to the previous year, there has also been a notable uptick in headquarters (from 41 percent to 48 percent) and data center projects (from 30 percent to 40 percent), suggesting renewed interest in corporate expansion beyond traditional industrial facilities.
- Energy availability and cost have risen sharply in perceived importance, driven by concerns over grid reliability and rising demand in energy-intensive industries.
- Access to development-ready land and fast-track permitting processes are perceived as critical, underscoring the importance of speed to market.

Table 2-1 presents the leading factors influencing consultant decision-making in industrial site selection, as reported by respondents to the 2025 survey

Table 2 1. Factors Affecting Expansion/Investment Plans in 2025, Consultants

	Score	1st	2nd	3rd	4th
Energy availability and cost	2.89	43.9%	15.2%	27.3%	13.6%
Economic pressures	2.56	22.7%	33.3%	21.2%	22.7%
Workforce, labor availability	2.45	22.3%	19.7%	24.2%	28.8%
Supply chain reliability	2.11	6.2%	32.3%	27.7%	33.9%

Source: *Area Development. 2025. 21st Annual Consultants Survey. Accessed May 22, 2025. https://www.areadevelopment.com/Corporate-Consultants-Survey-Results/q1-2025/39th-annual-corporate-21st-annual-consultants-surveys-what-business-leaders-and-consultants-are-saying-about-site-selection.shtml*

2.2 OVERVIEW

This report focuses on assessing the capacity and suitability of industrially zoned lands to understand whether the county land base is competitive enough to attract and grow businesses in target manufacturing industries. The industries of focus are maritime, energy, food products, wood products, recreation, and supportive manufacturing.

- **Sector:** A sector is a broader classification that encompasses multiple industries, such as manufacturing or retail. The first two digits of the North American Industry Classification System (NAICS) code indicate the sector.
- **Industry:** Industries comprise businesses and organizations involved in similar or related types of production or services. Businesses are classified using a NAICS code based on their primary activity, which is generally the activity that generates the most revenue for the establishment. Three-, four-, five-, and six-digit NAICS codes further refine this classification into subsectors, industry groups, specific industries, and national industries.
- **Cluster or Traded Cluster:** An industrial cluster is a geographic concentration of interconnected businesses, suppliers, and associated institutions in a particular field.

The analysis in this section uses the NAICS to evaluate trends in the county and in competitive counties. The primary focus is on uses categorized in the manufacturing sector (NAICS 31-33). In addition to manufacturing uses, industrial lands are also used by businesses in the construction sector (NAICS 23) and transportation and warehousing sector (NAICS 48-49). As is highlighted in Section 3.2, other nonindustrial uses are also

permitted in many zoning districts that allow industrial uses throughout the county. The Port is focused on ensuring that industrial land is ready and available to support the creation of higher-wage manufacturing jobs.

Target industries for which the Port is focused on retaining and attracting businesses are categorized by two- and six-digit NAICS codes. These codes provide a detailed classification of the industries involved. The six-digit NAICS codes that comprise each target industry are provided in Appendix A.

2.3 TARGET INDUSTRIES

This section outlines the target industries examined in the study—maritime, food products, wood products, energy, recreation, and supportive manufacturing—and explores industry trends that may influence future industrial land use.

2.3.1 Maritime

Maritime industrial businesses are those that operate within the broader maritime industry, focusing on activities related to the transportation of goods and people across waterways, as well as services and operations that support marine activities. These businesses often include shipping companies, boat (less than 50 meters in length) and ship (at least 50 meters in length) building and repair facilities, ports and terminals, fishing operations, marine equipment manufacturing, and offshore energy production. Whatcom County benefits from its numerous marine-industrial areas, which provide extensive opportunities for maritime-related activities. Important operators in Whatcom County include All American Marine, Birdon Group, and Northwest Marine Industries.

The National Marine Manufacturers Association reports steady but moderate growth in U.S. boat building, with forecasts showing continued demand in 2025. The industry is seeing a shift toward more specialized and custom-built vessels, particularly in commercial and workboat segments (NMMA 2025). The state is positioning itself as a global hub for maritime innovation. This includes investment in advanced vessel design, automation, and digital shipbuilding technologies. Washington's strengths in aerospace and clean technology are being leveraged to modernize boat building practices (Commerce 2018a).

There is a growing emphasis on building vessels (boats and ships) that support environmental goals. Washington Maritime Blue, a public-private initiative, is leading efforts to transition the state's maritime sector—including building commercial marine vessels—toward low-carbon and zero-emission technologies. This includes electrification of vessels, hybrid propulsion systems, and alternative fuels like hydrogen and methanol (Commerce 2019). A local example is the first hydrogen fuel cell-powered vessel, in use as a ferry, was created by All American Marine on Bellingham Bay. The ferry, which is offering free service between San Francisco's Downtown Ferry Terminal and the city's Pier 41, can carry 75 passengers at a time (AA Marine n.d.).

2.3.2 Food Products

Food product manufacturing involves enhancing raw agricultural or food materials by transforming them into higher-value products through processing, packaging, or specialized preparation. This industry adds economic worth by improving the quality, convenience, or desirability of food items, catering to consumer preferences and market demands. Examples of value-added food products include ready-to-eat meals, organic or specialty foods, gourmet snacks, frozen or canned goods, and fortified or functional foods (such as those with added nutrients). The industry often incorporates innovative techniques like preserving, fermenting, freezing, or incorporating unique ingredients to create products with extended shelf life, improved taste, or specific health benefits. The Whatcom County food products sector currently supports activities from extraction to processing and production. Notable operators in the County include Northline Seafoods, Fat-Cat Fish, and Chuckanut Bay Foods.

2.3.3 Wood Products

The wood products industry encompasses businesses involved in the harvesting, processing, and manufacturing of wood and wood-based materials. This industry processes materials

harvested in forestry and logging operations to produce a variety of products such as lumber, plywood, particleboard, veneer, and engineered wood products. The existing Whatcom County wood products industry includes mass timber, paper products, offsite construction, and door-making.

In addition to the manufacture of structural and construction materials, the industry also includes the production of furniture, cabinetry, wood flooring, paper, and packaging materials. Companies in this sector often focus on maximizing efficiency and sustainability by using byproducts, such as wood chips and sawdust, for energy production or secondary products such as fiberboard and mulch. The wood products industry plays a vital role in supporting construction, manufacturing, and various consumer goods markets, while also contributing to rural economies and offering employment opportunities.

According to the Institute for Supply Management and reported by Woodworking Network, the wood products manufacturing sector is expected to see continued economic improvement in 2025. Revenues are projected to rise, with capital expenditures increasing by 5.2 percent and employment growing by 0.8 percent. This reflects broader optimism across manufacturing sectors, including the wood products sector (Woodworking Network 2024a). Industry leaders, including Amanda Conger of the Cabinet Makers Association and the National Woods Board, report a promising outlook across commercial, residential, and organizational niches. Commercial and institutional millwork is expected to have a strong year, with many contracts already secured Woodworking Network 2024a). There's also notable growth in closets and organized storage, with some companies forecasting revenue increases of 10 to 12 percent (Woodworking Network 2024b). Recent tariffs imposed on raw materials may impact the demand of Wahington wood product exports (Kentley Insights 2025).

2.3.4 Energy

The energy products manufacturing industry focuses on the design, production, and distribution of technologies and systems that generate, store, or utilize energy in more efficient ways. This industry includes a wide array of products, such as exported petroleum products, energy storage solutions such as batteries, and renewable energy technologies such as solar panels and wind turbines. Notable operators in the county include British Petroleum, and Phillips 66. An emerging energy related operator is NextEra Energy who is proposing a utility-scale battery energy storage system or BESS in Custer. At Cherry Point, AltaGas currently operates a liquid propane gas export facility (ALA Energy) that ships propane and butane globally. In parallel, AltaGas is advancing plans to build a large green hydrogen plant on the former Intalco smelter site just north of the ALA Energy property in Cherry Point. These plans and efforts are part of the Pacific Northwest Hydrogen Hub, which is pending federal funding and regulatory approvals.

Supplementing power to the electrical grid with traditional power sources and renewable sources to support the attraction of major industrial users that have significant power requirements (e.g. AltaGas's green hydrogen plant, data centers, and large-scale manufacturers) will be needed to maintain the county's competitive position. In addition to NextEra's 100-megawatt BESS, Public Utility District No. 1 of Whatcom County is exploring geothermal as a new energy option. A feasibility study was completed in 2024, and, while there is some promise for enhanced geothermal systems in the county, the path to implementation is long and wrought with hurdles. Finally, Northwest Pipeline LLC is planning the Rockies Columbia Connector Project that will expand gas transmission between southwest Idaho and Sumas, Washington. The target in-service date is November 2030.

2.3.5 Recreational Goods

Recreation is a major attractor for visitors to and residents of Whatcom County. The recreational goods manufacturing industry focuses on designing, producing, and distributing clothing, equipment, and accessories tailored for outdoor activities, sports, and recreational pursuits. This includes items such as hiking boots, outdoor jackets, athletic wear, camping gear, backpacks, tents, sleeping bags, and specialized equipment for activities

such as cycling, skiing, climbing, and water sports. Prominent local businesses in this industry include Gear Aid, Superfeet, and Transition Bikes, all of which contribute to a growing ecosystem of innovation and craftsmanship in outdoor gear. Other notable manufacturers include SMC Gear (climbing and rescue equipment), Aerotech Golf Shafts, and Allsop/Softride, which reflect the county's diversity in recreational product development.

Participation in outdoor activities rates increased by 4.1 percent year-over-year, reaching 57.3 percent of the U.S. population, providing a boost in spending on outdoor products (Hexagon Capital 2025). This trend is mirrored in Washington state, where the outdoor recreation economy reached $22.5 billion in 2023, contributing 121,445 jobs and accounting for 2.8 percent of the state's gross domestic product (AXIOS 2024). Recreational goods manufacturing is a key component of this economy, with strong demand for locally made, high-performance gear. Washington ranks sixth nationally in outdoor recreation's contribution to the state economy, with activities like boating, fishing, RVing, and snow sports driving significant consumer spending.

2.3.6 Supportive Manufacturing

The supportive manufacturing cluster involves the creation and manufacturing of custom components and parts used across various sectors, including automotive, aerospace, construction, electronics, industrial machinery, and others. Parts fabrication companies work with a wide range of materials, including metals, plastics, composites, and ceramics, depending on the application and performance needs of the end product. The industry is vital to supply chains, enabling the production of everything from consumer goods to advanced technologies. Notable industry operators in the county include Janicki Industries, App Apollo, and Hexcel.

It is expected that manufacturers are shifting operations closer to home to reduce exposure to international disruptions and logistics issues (NIST 2025). Small manufacturers will benefit from reshoring by accessing local or regional supply networks that can provide faster turnaround times and more flexible production. The rise of 3D printing allows for flexibility and rapid customization of supportive products. The precision of 3D-printed materials allows manufacturers to operate in smaller spaces, reducing the need for large production facilities in the supportive manufacturing industry.

2.4 COUNTY COMPARISON

The county comparison analysis outlines conditions influencing industrial development in the county, including trends in demographics, labor force, industrial sector employment, wages, and real estate. Key economic components in Whatcom County are compared to the following counties to understand its competitiveness for industrial users: Clark County, Cowlitz County, Lewis County, King County, Kitsap County, Skagit County, Snohomish County, and Spokane County. These competitive counties are located along the I-5 corridor, except for Spokane County which represents competitive industrial development along the Interstate 90 corridor. An expanded county comparison assessment can be found in Appendix B. A web-based interactive County Comparison Dashboard can be accessed with this link: https://public.tableau.com/app/profile/hoffma52/viz/PoBIndLands/CountyComparison.

Key Takeaways: The following analysis outlines the key economic opportunities and constraints in the county:

- County manufacturing employment is decreasing and no new industrial buildings dedicated to manufacturing have been built since 2010.
- There is an opportunity for employment growth in food and beverage processing. These growing employment sectors are supported by recent developments in food processing and refrigeration in cold storage buildings.
- County vacancy rates are low and rental rates are high compared to competitive counties which indicates demand for industrial space is high in the county.

Workforce development in the county is challenged by high unemployment and low wages compared to state unemployment

and wage rates.

Population: The county's population is growing at a rate of 1.4 percent, outpacing the state average of 1.3 percent and all other competitive counties except Clark (1.9 percent), King (1.5 percent), and Snohomish (1.5 percent).

Overall Employment: Unemployment in Whatcom County is 5.7 percent, a rate slightly higher than in Washington state and Clark, King, Kitsap, Snohomish, Spokane, and Whatcom Counties, but lower than in Cowlitz, Lewis, and Skagit Counties.

- The labor force participation for the working age population (defined as people between the ages of 25 and 54) is the same in the county as in the state.
- Most residents both work and live in the county. Workers from outside of the county, not including Canadian workers, come from Skagit, King, and Snohomish Counties.

Employment by Industry: Key industries such as food and beverage manufacturing were the only manufacturing industries to both grow the number of firms and jobs in Whatcom County between 2018 and 2023. Food manufacturing added over 80 jobs and 7 new firms, while beverage manufacturing grew by 65 jobs and also gained 7 firms. The petroleum industry and wood product industry are consolidating (growing workers but losing firms). Warehouse and storage and other transportation and warehousing sectors were the only transportation and warehousing industries that grew in the County between 2018 and 2023.

Manufacturing job growth slowed statewide (-0.9 percent) between 2018 and 2023. When compared to the competitive counties, the county lost manufacturing jobs annually at the highest rate (-2.5 percent), while Cowlitz County gained manufacturing jobs at the highest rate (2.8 percent annually).

- Transportation and warehousing job growth in the county also declined between 2018 and 2023 at a rate of 1.5 percent per year. Statewide employment in this sector grew at a rate of 5.8 percent per year during the same time. Selected competitive counties—including Spokane County (10.1 percent), Snohomish County (8.0 percent), and Whatcom County (5.8 percent)—grew at annual rates that were the same as or higher than the state.
- The number of manufacturing jobs is slipping (year over year and over three years) in the county. This is true for most competitive counties except for Cowlitz, Snohomish, and Spokane Counties, which are either gaining or leading in manufacturing employment.

Wages: Average manufacturing sector (NAICS Codes 31-33) and transportation and warehousing sector (NAICS Codes 48-49) wages are higher in Washington state overall compared to Whatcom County for every sector besides petroleum products (NAICS Code 324) and warehouse and storage (NAICS Code 493). In 2023 Snohomish County and King County were the only competitive counties with higher manufacturing wages than the state, surpassing state wages by over $10 per hour and $8 per hour, respectively. The county manufacturing wage growth rate was higher than the wage growth rate in the state, Cowlitz County, Skagit County, and Snohomish County between 2018 and 2023.

County wages in transportation and warehousing had a lower annual growth rate than in the state and one of the lowest annual growth rates among competitive counties between 2018 and 2023. County wages for transportation and warehousing were also lower in the county than in the state in 2023. Transportation and warehousing wages in Cowlitz County and King County both exceeded 2023 sector wages in the state, by $26 per hour and $8 per hour, respectively. The annual wage growth between 2018 and 2023 was greater than six percent in Clark, Cowlitz, King, and Kitsap Counties.

Real Estate: The county, with 13.7 million square feet of commercially available space, has one of the smallest inventories of industrial building space when compared to competitive counties (CoStar 2024).

- A high percentage of the industrial land inventory in the county is used for manufacturing and a low percentage is used for distribution when compared to competitive counties. Over 73

percent of all industrial buildings in the county, including all the county's industrial building space used for manufacturing, was built before 2010.

- The county has a larger inventory of recently built refrigeration/cold storage (330,000 square feet) than all competitive counties besides Pierce County (620,000 square feet) and more newly built food processing space (100,000 square feet) when compared to all competitive counties, which saw no new food processing development. Refrigeration/cold storage and food processing are complementary uses that can be further developed by improving the distribution industry in the county.
- The county has a smaller amount of proposed industrial building square footage and square footage of industrial buildings under construction when compared to most competitive counties.

Vacancy: County vacancy rates for industrial buildings were lower than in the state for most years between 2014 and 2024. By December 2024, the county had an industrial vacancy rate of 2.2 percent, 4.5 percentage points lower than the state (6.7 percent) and one of the lowest vacancy rates among competitive counties. Vacancy rates for industrial buildings grew in most competitive counties and the state between 2023 and 2024.

Rent: The county industrial rental rate was within $0.10 of the state industrial rental rate every year between 2014 and 2024. By December of 2024, only King County ($1.17 per square foot) and Snohomish County ($1.08 per square foot) had higher rents per square foot than the county ($1.02 per square foot). The county rental rate for warehouse buildings was lower than in the state from 2018 to 2024. By contrast county rental rates for industrial uses, excluding warehousing uses, trended higher than in the same period.

Shift-Share Analysis: Shift-share analysis measures changes that have taken place over time (2013 to 2023) in a county relative to the state. The manufacturing sector (NAICS 31-33) in Whatcom County is considered strong and growing based on the data trends. Of the competitive counties, only Clark, Cowlitz, Lewis, and Skagit have strong and growing manufacturing sectors. Within the manufacturing sector, there are five industries in the county that are strong and growing:

- **311:** Food manufacturing (no other counties are strong and growing)
- **314:** Textile product mills (Skagit is the only other county that is strong and growing)
- **321:** Wood product manufacturing (Cowlitz, Pierce, and Skagit are strong and growing)
- **324:** Petroleum and coal products manufacturing (no other counties are strong and growing)
- **339:** Miscellaneous manufacturing (Clark and Cowlitz are strong and growing)

3. Whatcom County Industrial Landscape

This section examines historical trends in industrial development in Whatcom County to understand current industrial land use. By examining how industrial land has been utilized over time, the study identifies key trends that have shaped the county's industrial landscape and provides insight into the pace and scale of development as a check on this study's projected building and land needs to support anticipated industrial employment. The analysis then evaluates the remaining inventory of industrially zoned land, identifying where new industrial buildings can potentially be constructed. This includes a detailed review of zoning districts, industrial areas, and property-level characteristics that influence development potential. Specifically, this section addresses two key questions:

- What are the existing industrial building and land absorption trends in the county?
- Where can new industrial buildings be built in the county?

The answers to these questions form the foundation for understanding current capacity and planning for future industrial growth.

3.1 INDUSTRIAL BUILDING PATTERNS

The following analysis provides observations of trends that help illustrate the industrial building growth in the county over the past 20 years. Understanding these patterns will show the types of industrial buildings that comprise the county's industrial building inventory and highlight recent trends. This information is also used to check the projected building needs based on employment projections.

3.1.1 Industrial Building Types

There are approximately 15.3 million square feet of industrial space with an average building size of just over 13,500 square feet. This is estimated using the Whatcom County Assessor. 2024. improvement primary use code. Table 3-1 lists the codes and building primary use description. Figure 3-1 illustrates the square footage for industrial buildings in the county.

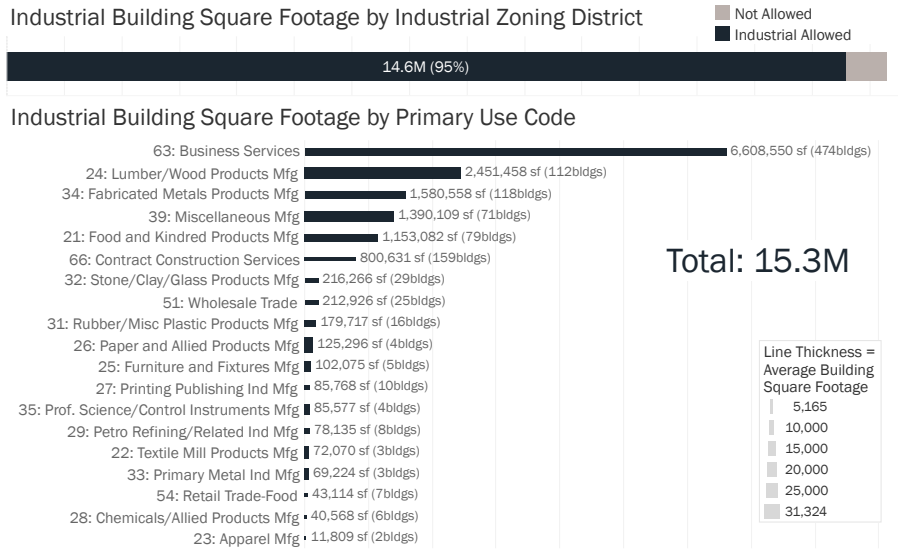
Table 3-1. Industrial Building Primary Use Codes

Improvement Primary Use Code: Description	
21: Food and Kindred Products Manufacturing	31: Rubber/Misc Plastic Products Manufacturing
22: Textile Mill Products Manufacturing	33: Primary Metal Ind Manufacturing
23: Apparel Manufacturing	34: Fabricated Metals Products Manufacturing
24: Lumber/Wood Products Manufacturing	35: Professional Science/Control Instruments Manufacturing
25: Furniture and Fixtures Manufacturing	39: Miscellaneous Manufacturing
26: Paper and Allied Products Manufacturing	51: Wholesale Trade[1]
27: Printing Publishing Ind Manufacturing	54: Retail Trade-Food[2]
28: Chemicals/Allied Products Manufacturing	63: Business Services[3]
29: Petro Refining/Related Ind Manufacturing	66: Contract Construction Services

Notes
[1] Buildings included in building primary use code 51 are food product-related, e.g., fish and seafoods, meat products, and fruits and vegetables.
[2] The only building type included as an industrial building in primary use code 54 is bakeries.
[3] Business service buildings are primarily warehousing and storage buildings, including cold storage. Mini-storage buildings are excluded.

Source
Whatcom County Assessor. 2024.

Figure 3-1. Whatcom County Industrial Building Inventory



Source: *Whatcom County Assessor, 2024.*

3.1.2 Industrial Building Construction Trends by Use and Size

Thirty eight percent, or just over 9.3 million square feet of industrial space, is concentrated in 13 warehouse and distribution buildings sized 250,000 square feet or more. Five of those buildings, totaling 3.8 million square feet or about 40 percent of that building size group, have been built since 2018. The following insights, and the chart in Figure 3-2, show there is a diversity of building sizes to support industrial activities:

- 15 percent of the inventory is in buildings between 5,000 square feet and 20,000 square feet.
- 12 percent is in buildings between 20,000 square feet and 50,000 square feet.
- 10 percent is in buildings between 50,000 square feet and 100,000 square feet.
- 19 percent is in buildings between 100,000 square feet and 250,000 square feet.

Since 2018, the county has seen just over 6.4 million square feet constructed, representing 26 percent of the overall industrial inventory. There have been 48 buildings totaling less than 100,000 square feet built, which totals 777,000 square feet, but this represents only 12 percent of the total square footage built during the past five years. Large warehouse and distribution centers total 88 percent of the building square footage built since 2018.

- A total of 11 buildings of between 100,00 square feet and 250,000 square feet (comprising 1.8 million square feet) have been constructed since 2019, comprising 28 percent of the overall total during this period.
- A total of five buildings larger than 250,000 square feet (comprising nearly 3.8 million square feet) have been constructed since 2019, comprising 59 percent of the overall total during this period.

Figure 3-2. Industrial Building Square Footage Range Trends

Source: *Whatcom County Assessor, 2024.*

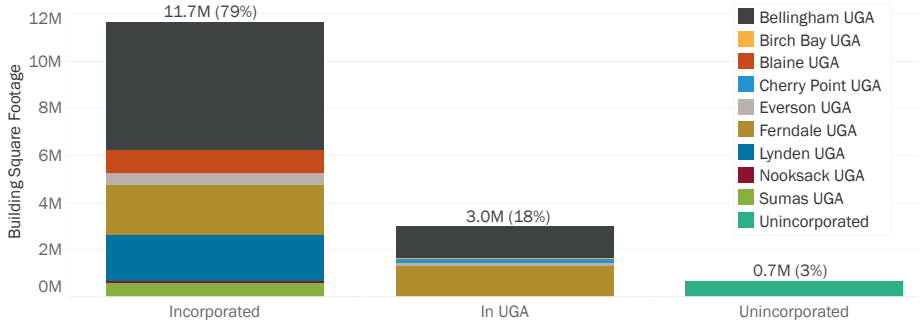
This analysis supports the *need for an industrial land supply that can support a wide range of building types to meet growing and mature industrial businesses*. Typically, buildings under 100,000 square feet support light industrial and manufacturing businesses, whereas structures over 100,000 square feet support distribution and warehouse and large scale manufacturing uses. Figure 3-2 shows that new construction of industrial buildings is concentrated in buildings over 100,000 square feet. To meet anticipated employment growth to support the broad industrial building needs of the target industries, including new and emerging businesses and mature businesses, there will need to be continued construction of buildings over 100,000 square feet and a concerted effort to support industrial building construction under 100,000 for growing business.

3.1.3 Industrial Building Construction by UGA

The cities of Bellingham, Ferndale, and Lynden have the most industrial building square footage with 5.4 million (36 percent of total), 2.2 million (14 percent of total), and 2.0 million (13 percent of total), respectively. Figure 3-3 shows the industrial building concentrations by jurisdiction.

The cities of Bellingham, Ferndale, and Lynden have the most industrial building square footage with 5.4 million (36 percent of total), 2.2 million (14 percent of total), and 2.0 million (13 percent of total), respectively. Figure 3-3 shows the industrial building concentrations by jurisdiction.

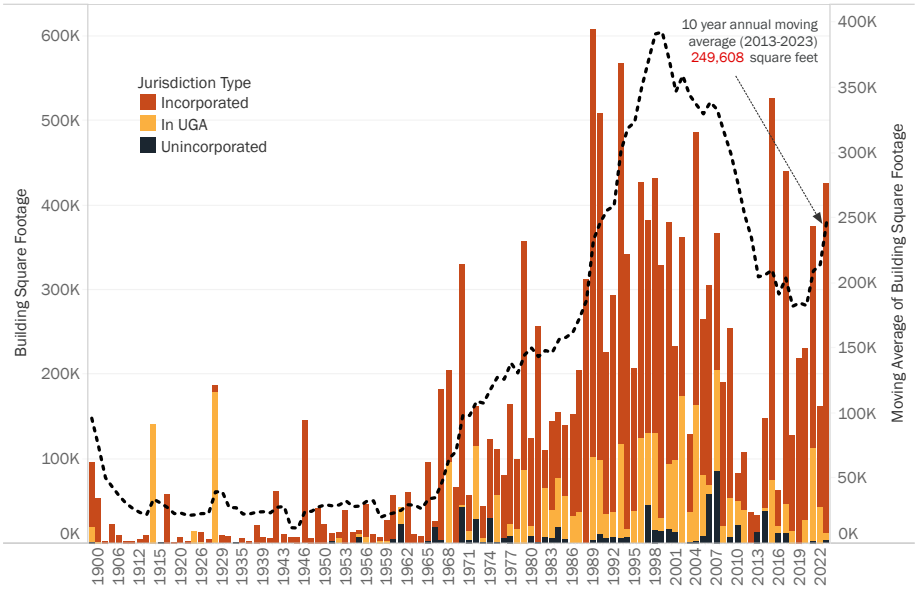
Figure 3-3. Industrial Building Square Footage by Jurisdiction Type



Source: *Whatcom County Assessor, 2024.*

Figure 3-4 shows the annual industrial square footage constructed, represented by bars, with a trend line showing the ten-year moving average. The moving average line shows steady growth until 1999 when the ten-year moving average peaked at an average of nearly 393,000 square feet per year. A downward trend in the moving average continued until 2021, when a combination of more consistent annual new construction and three years of strong deliveries (2015=527,000 square feet, 2017=440,000 square feet, and 2021=375,000 square feet) helped spur three years of sustained industrial construction growth. In 2023, the county saw 426,000 square feet of new industrial construction.

Figure 3-4. Annual New Industrial Building Square Footage Construction Trends



Source: *Whatcom County Assessor, 2024.*

The data from Figure 3-4 shows a relatively narrow band of annual averages with an average between 236,496 building square feet per year at the lower end (20-year average annual delivery, 2003 to 2023) to 278,256 square feet per year at the upper end (30-year average annual delivery, 1993 to 2023). The reason the 20-year average was the lowest and the 30-year average the highest involves two key factors. First, the 1990s were the most productive decade in Whatcom County for industrial building construction with a total of 3.7 million square feet built or 371,432 square feet per year. The 1990s annual average of building construction per year exceeds the 30-year average by nearly 100,000 square feet. The second factor was two recessions, the eight-month Dot-Bomb Recession in 2001 and the more significant Great Recession from December 2007 to June 2009. While there was only one major down year coming out of the Dot-Com Recession, there were five solid years of significant under-construction after the Great Recession until a spike in 2015 followed by an inconsistent year-over-year construction trend after 2015. Between 2020 and 2023,

despite the COVID-19 recession, 1.2 million square feet of new industrial buildings were constructed for an average of 397,327 square feet per year for that period.

The trends by decade illustrated in Table 3-2 show the degree to which industrial building construction was impacted in the 2010s when compared to the 1980s and especially the 1990s and 2000s.

Table 3 2. Industrial Building Construction Trends, by Decade

Year Built Range	Industrial Building Square Footage	
	Total	Annualized
1970s	1,528,807	152,881
1980s	2,206,450	220,645
1990s	3,714,319	371,432
2000s	2,967,511	296,751
2010s	1,780,645	178,065
2020+	1,191,980	397,327

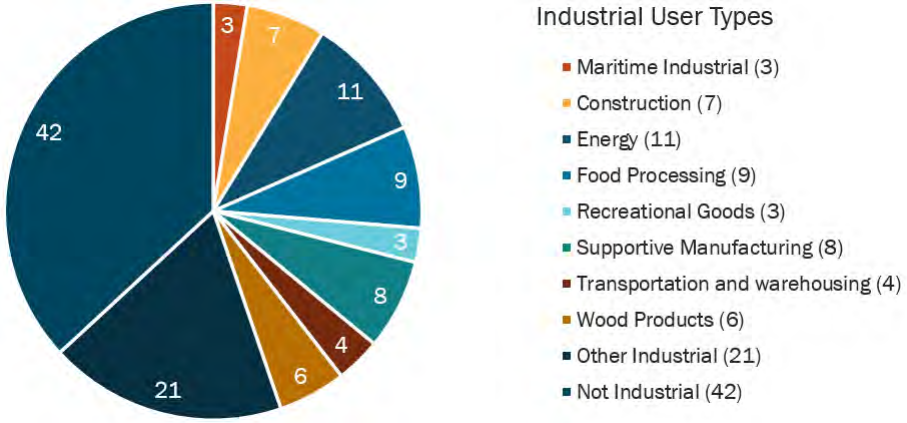
Source: Whatcom County Assessor. 2024.

3.2 INDUSTRIAL LAND

3.2.1 Zoning Districts

A comprehensive review of zoning codes across all municipalities in Whatcom County was conducted to (1) identify where industrial activities may be located and (2) assess the types of industrial uses that are permitted outright or subject to conditional approval. Among the county's seven incorporated jurisdictions and the County zoned land, there are a total of 38 zoning districts that either permit outright or conditionally permit industrial uses. Among those zoning districts there are a combined 114 different types of land uses that are either permitted outright or conditionally permitted in at least one of the jurisdictions in Whatcom County. To organize this wide range of uses, each was assigned an industrial user type. Figure 3-5 shows the number of land use categories by industrial user type. A significant number of the land use categories, 42 out of 114 categories or 37 percent, are uses that are commercial uses, but not inherently industrial uses. These include mini-storage, office buildings, restaurants, medical facilities, and daycare facilities.

Figure 3-5. Count of Industrial Land Use Categories by Industrial User Type



Source: *Whatcom County jurisdictions*

This wide range of allowed land uses in industrially zoned districts among jurisdictions in the county creates challenges for industrial users seeking development opportunities for a specific land use. For example, heavy industrial uses such as wrecking yards are permitted in certain industrial zones within the city of Bellingham but are prohibited in the industrial zones of the cities of Blaine and Lynden. Similarly, nonindustrial uses such as emergency services (e.g., police, fire, and ambulance) are allowed in the Ferndale industrial zones but are not permitted in Blaine's industrial zones. These two examples of the many discrepancies highlight the need for a more coordinated approach to industrial zoning across the county. A comprehensive table summarizing categories of land use in industrial zoning districts by jurisdiction can be found in Appendix C.

3.2.2 Industrially Zoned Land

There are approximately 15,099 gross acres, or total acres before deducting land area that cannot be built on, in the county that are zoned to support industrial development. This includes land in incorporated areas as well as county land in a UGA or outside a UGA zoned for industrial use, totaling 2,181 acres. Within UGAs, Cherry Point has the most industrially zoned land, with 7,135 acres.

Table 3-3 shows the county's total volume of industrially zoned land by UGA in acres.

Table 3-3. Acres of Industrially Zoned Land by UGA

UGA Name	Incorporated	In UGA	Unincorporated	Total
Bellingham	2,181	2,485	–	4,665
Ferndale	870	356	–	1,226
Lynden	524	169	–	693
Sumas	363	–	–	363
Blaine	322	–	–	322
Everson	175	35	–	209
Nooksack	32	–	–	32
Cherry Point	–	7,135	–	7,135
Outside UGA	–	–	453	453
Total	**4,467**	**10,179**	**453**	**15,099**

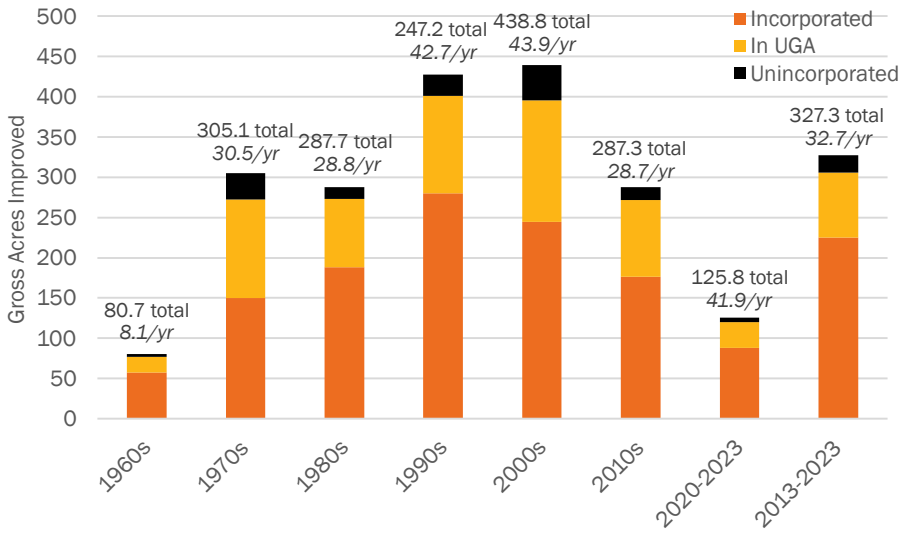
Notes
– = not applicable
UGA = urban growth area

Source
Whatcom County Assessor, 2024.

3.3 Industrial Land Absorption

Industrial land absorption refers to the rate at which industrial-zoned land is developed or occupied over a specific period. Between 2013 and 2023, approximately 327.3 gross acres were developed with industrial buildings, averaging 32.7 acres per year. From 2020 to 2023, this pace increased to an average of 41.9 acres annually. This recent activity aligns with trends observed during the 1990s and 2000s, indicating a return to historically strong construction levels. Figure 3.6 illustrates these trends by jurisdictional area.

Figure 3-6. Land Absorption Trends by Jurisdictional Area, Gross Acres



Source: *Whatcom County Assessor, 2024.*

4. Developable Land Analysis

The Developable Land Analysis establishes a comprehensive framework for evaluating both the quantity and quality of industrially zoned land available for future development across Whatcom County and within each designated industrial study area. The analysis begins by identifying the total amount of potentially developable land, as defined in the sections that follow. The initial inventory is then refined by applying zoning regulations and critical area constraints—such as the existence of wetlands, waterbodies, and floodways—to more accurately assess the usable industrial land supply. To ensure the accuracy and relevance of the findings, the desktop analysis was reviewed and validated by Port staff, incorporating local knowledge to ground-truth the results. The refined analysis is applied to each of the 19 industrial areas, providing a detailed profile of development opportunities and constraints unique to each location. This approach offers a clear view of industrial land availability to guide strategic planning for future growth and serves as a foundational input for the available land supply for the reconciliation analysis.

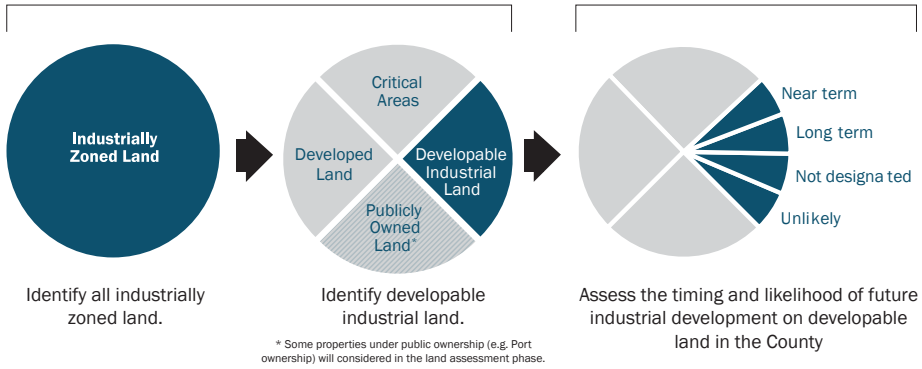
4.1 Methodology

An inventory of the available industrial land is required to assess whether there is sufficient industrial land supply to support anticipated industrial employment. This is done in two phases: the industrial land inventory phase and the developable industrial land assessment phase. The industrial land inventory phase identifies the amount of net developable industrial land available in the county, while the developable industrial land assessment phase evaluates the timing and feasibility of potential industrial development.

The comprehensive result results of these phases provide a comprehensive understanding of industrial land availability and readiness. A simplified graphic illustrating these two phases is depicted in Figure 4-1. The sections that follow will reveal how industrial land has been used in the county and the land that is remaining for development. This process answers the following questions:

- Of identified developable land in each industrial area, how many acres (exclusive of the net of critical areas that preclude development) are potentially available?
- What are the defining characteristics of the developable land net of critical areas?

Figure 4-1. Land Inventory Methodology



4.1.1 Industrial Study Areas

TTo support a more localized and focused analysis of industrial development, 19 industrial study areas across the county were identified. These areas were selected based on their concentration of industrial properties, strategic locations, and potential for industrial growth. Most of the study areas are situated within a UGA, except for the Guide Meridian Rural Industrial Area. A map illustrating the location of these industrial study areas can be found in Appendix D. The following industrial study areas were the focus of the land inventory analysis:

- **Bellingham Airport Industrial:** The immediate area surrounding Bellingham International Airport (BIA).

- **Bellingham Barkley Village:** An industrial area along Barkley Boulevard on the east side of Bellingham.
- **Bellingham Cordata/Guide Meridian:** An industrial area partially on the northern boundary of the city of Bellingham and the UGA.
- **Bellingham Fairhaven Marine:** The Port-owned property is south of the Bellingham Marina in the Fairhaven neighborhood and comprises five existing buildings.
- **Bellingham Harbor Industrial:** The Bellingham Marina and surrounding area including the Aerated Stabilization Basin (ASB) pond that will be filled to support future marine-industrial uses.
- **Bellingham Haskell BP/Iowa St:** Located in central Bellingham, this study area is just off the Iowa Street exit (254) of I-5. This industrial study area includes several industrial buildings along Virgina and Kentucky Streets.
- **Bellingham Irongate:** Located in the northeast corner of Bellingham, this study area includes portions north of the existing Irongate Industrial Area.
- **Bellingham Marine Drive:** Includes the industrial waterfront areas northeast of the Bellingham Marina.
- **Bellingham Orchard Street:** Includes an industrial and warehousing cluster east of I-5.
- **Bellingham Slater/NW Ave:** Includes the industrial area between Northwest Drive and I-5, northeast of BIA.
- **Blaine Industrial:** Includes the city's industrial area south of Blaine.
- **Cherry Point:** Defined by large fuel operators including Phillips, BP, and AltaGas. The area is served by a railroad and transloading facilities in the Salish Sea but large areas lack access to public utilities.
- **Custer Industrial:** Unincorporated industrial area along I-5, east of Birch Bay.
- **Everson/Nooksack:** The combined industrial areas of the cities of Nooksack and Everson.
- **Ferndale Industrial:** Industrial area along I-5 at the south end of the city of Ferndale and north of BIA.
- **Grandview (North Ferndale):** Industrial area along I-5 in north of Ferndale, in the UGA.
- **Guide Meridian, Rural Industrial:** This study area, located in an unincorporated region south of Lynden, is not currently zoned for industrial use. However, it holds potential for future industrial development pending a zoning change.
- **Sumas Industrial:** A cluster of industrial properties with rail access on the west side of Sumas.
- **West Lynden:** An industrial area on the west side of Lynden, partially within the Lynden UGA.

4.1.2 Parcels and Properties

Two different geographic frameworks are used to analyze the inventory and reconciliation of industrial land in the county: parcels and properties. Parcels refer to individual tax lots within the county whereas properties are defined as contiguous groupings of parcels that are under common ownership. An illustration of this distinction is shown in Figure 4-2. The analysis conducted during the land inventory phase uses property-level acreage to reflect common ownership land assemblages with higher redevelopment potential.

Figure 4-2. Depiction of a Common Ownership Parcel Set and Property

4.1.3 UTILIZATION CATEGORIES

The first step to refine the industrial land inventory is to calculate how land is used. An approach commonly used by growth management planning jurisdictions is the utilization ratio, a metric that estimates how the buildings on a parcel provide utilization relative to the value of land by dividing the assessed building value into the assessed land value. Land is considered developable if it is categorized as either underutilized, very underutilized, or vacant. Using this metric, parcels are categorized in one of four ways as shown in Table 4-1.

Table 4-1. Utilization Categories

	Utilization Category	Thresholds
Developable Property	Vacant	If the building value is less than $10,000 OR total acres less than 0.055 acres
	Very Underutilized	If the utilization ratio is less than 0.5
	Underutilized	If the utilization ratio is greater than 0.5 but less than 1.0
Developed Property	Developed	If the utilization ratio is greater than or equal to 1.0

Notes
Utilization ratio = assessed building value/assessed land value.
Developable = Land categorized as either vacant or underutilized.
Source
Washington State Department of Commerce. 2018b.

4.1.4 CRITICAL AREAS AND NET DEVELOPABLE ACREAGE

To determine the total net acreage of developable industrial land, industrially zoned areas unlikely to support development due to the presence of critical areas were excluded from the inventory. Natural influences that reduce usable acres include bodies of water and associated buffers, wetlands, and floodways that preclude development to maintain ecological function. Natural influences that impede but do not preclude usable acres include geologic hazards, aquifers, floodplains, and habitats. To determine net developable acreage, the footprints of critical areas were overlaid onto the previously calculated gross developable land. The area remaining after subtracting these critical areas represents the net developable acreage.

A summary of the critical area factors used to reduce usable areas as well as the critical area factors that were identified as impeding development, but not necessarily reduce the usable acres, is provided in Appendix E.

4.1.5 INDUSTRIAL LAND ASSESSMENT

Following the identification of net developable industrial acreage, a comprehensive assessment was undertaken to evaluate both the timing and the likelihood of future industrial development across the county and within each designated industrial study area. The review focused on developable properties over five net acres in area, aligning with the study's priority to ensure that sufficient land is available to support the expansion of existing Whatcom County manufacturers and to attract new and growing industrial businesses to the area.

Each property over five acres was evaluated for its strengths—such as freight access and utility availability—as well as its constraints, including the presence of critical areas and the current use on properties with established businesses. When available, marketing materials were reviewed to assess the property's current availability. Additionally, the project team consulted with the Port's economic development staff to incorporate their nuanced understanding of property conditions and ownership dynamics.

Properties in the 1-to-4.99-acre range are not likely to attract large-scale manufacturers and institutional industrial developers; however, these properties play a vital role in supporting emerging and growing industrial operations that are essential to the county's manufacturing ecosystem. These smaller properties were not reviewed in detail for near- or long-term potential, and categorization of these properties relies on the utilization calculation.

The developable industrial land assessment phase resulted in the classification of each property into the following development categories:

Development Categories

- **Near-term:** This development category includes properties that are at least five acres and served by necessary utilities and are ready for development and could be developed within the next five years. These properties may also have planned developments based on permit data or primary research. Planned development is a broad term that captures the following types of projects:
  - Projects that have been introduced to the jurisdiction either at a documented pre-submission conference meeting or that have advanced further through the permitting process.
  - Projects that were sourced from third-party real estate data providers. These projects have not yet been introduced by a city, but the owner has identified the highest and best use, developed conceptual site plans, and marketed the opportunity.
- **Long-term:** This development category includes properties that are at least five acres and lack utility infrastructure and/or have critical areas that result in development pockets rather than a large contiguous area. Properties identified for long-term potential require substantial investment but still present viable opportunities for future redevelopment. These long-term sites are generally projected to be on a development timeline of five to 20 years.
- **Unlikely:** This development category includes properties that are at least five acres and unlikely to be redeveloped, including those with significant critical area constraints, fragmented or noncontiguous usable land, nonindustrial zoning, or existing development that was not captured in the assessor data.
- **Developable, Vacant + Very Underutilized (1-to-4.99ac):** This development category includes properties more than one net acre and less than five net acres and falls into the utilization categories of vacant or very underutilized.
- **Developable, Underutilized (1 to <5ac):** This development category includes properties more than one net acre and less than five net acres and falls into the utilization category of underdeveloped.

4.2 COUNTYWIDE LAND INVENTORY

Table 4-2 identifies 7,826 developable acres of the 15,095 total acres of industrially zoned land in the county. Of the developable industrial land, 4,524 acres, or 58 percent, are in a UGA; 295 acres (4 percent) are in the unincorporated areas of the county; and 3,007 acres (38 percent) are in incorporated Whatcom County.

Table 4-2. Industrially Zoned Acres by Utilization Category, Gross

Utilization Category	Incorporated	In UGA	Unincorporated	Total
Developed	1,456	5,661	151	7,268
Underutilized	669	263	94	1,026
Very Underutilized	926	1,614	127	2,667
Vacant	1,412	2,647	74	4,133
Total Gross Acres	4,463	10,185	446	15,094
Developable Acres	3,007	4,524	295	7,826

Note
UGA = urban growth area.

Source
Whatcom County Assessor, 2024.

Table 4-3 presents the net remaining industrial land, calculated by excluding developed properties and subtracting potentially impacted critical areas from the total gross industrial acreage. Countywide, there are approximately 3,387 acres of net developable land that are currently zoned to support industrial development. This is a reduction of 57 percent from the total developable acreage calculated by utilization category. Approximately 1,805 acres (53 percent) of the net developable acreage are located within UGAs, 1,376 acres (41 percent) are within incorporated areas, and 206 net acres (6 percent) are in unincorporated areas. The industrial land will be assessed further in Section 4.5.

Table 4-3. Developable Industrial Acres, Net

Geography	Incorporated	UGA	Unincorporated	Total
Underutilized	409	102	81	593
Very Underutilized	436	705	83	1,223
Vacant	531	998	43	1,571
Total Net Acres	1,376	1,805	207	3,387

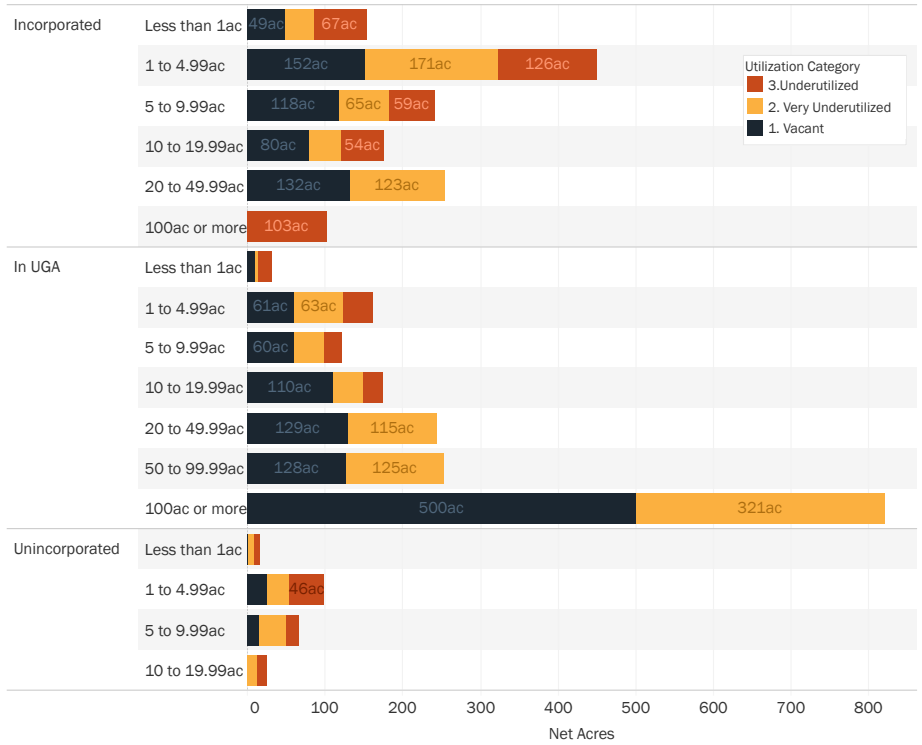
Note
UGA = urban growth area.

Source
Whatcom County

There is an estimated 3,470 total net acres of developable industrial zoned land in Whatcom County. Most of the acreage lies within a UGA, which comprises the largest share of land classified as underutilized, particularly in larger properties. Notably, the population of parcels over 100 acres in area includes 500 total acres of very underutilized land and 321 total acres of vacant land. Large properties (20 to 49.99 acres and 50 to 99.99 acres) show redevelopment potential, with approximately 497 acres acres categorized as vacant or very underutilized. The concentration of large underutilized parcels highlights areas within UGAs as key targets for future industrial development.

Incorporated areas also include a substantial amount of vacant, very underutilized, and underutilized land, especially in the 1-to-4.99-acre range, which accounts for a combined 450 acres across all utilization categories. A single 103-acre vacant parcel accounts for the entire large properties population across all incorporated areas. In contrast, unincorporated areas offer limited potential, with mostly small parcels under five acres represented, totaling just 81 acres of vacant land. This is illustrated in Figure 4-3.

Figure 4-3. Net Developable Industrial Acres by Jurisdiction Type and Utilization Category



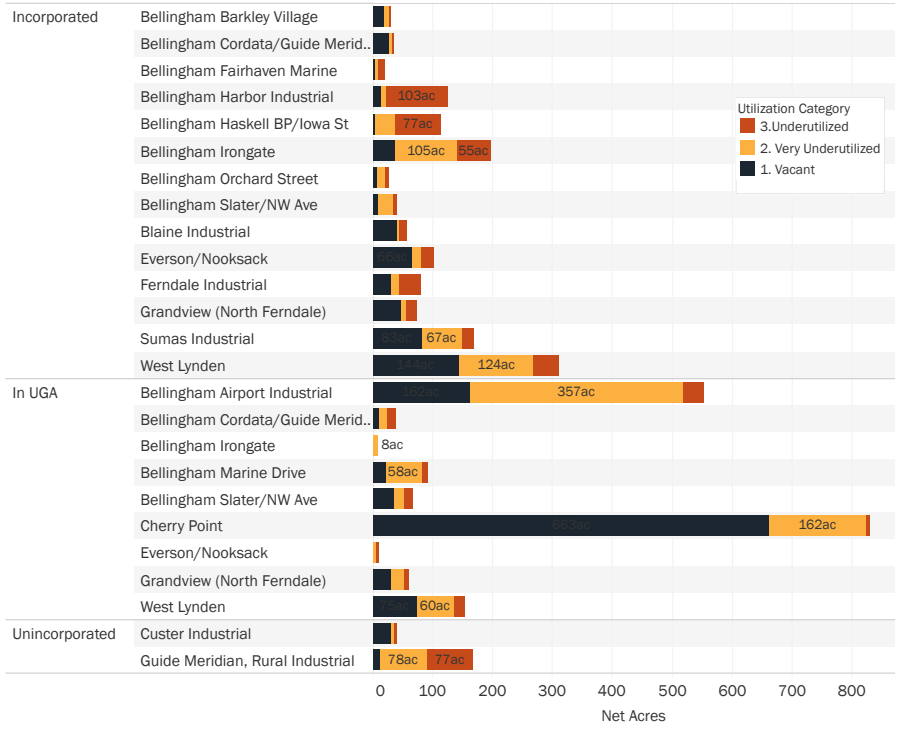
Source: *Whatcom County, MFA*

4.3 INDUSTRIAL STUDY AREA LAND INVENTORY

Figure 4-4 illustrates the industrial areas that have the highest concentration of net developable industrial land. Cherry Point has 830 acres of net developable industrial land, the most acreage compared to any other industrial area. Most of this land is currently vacant and lacks utility infrastructure, indicating a need for significant investment to support future development. The Airport Industrial District ranks second, with 552 acres of net developable land, most of which is concentrated in a single 320-acre parcel that includes the airport runway. West Lynden follows with 462 acres, characterized by largely vacant and underutilized

land. Across these leading districts, the predominance of vacant or very underutilized land suggests that utility extensions will be necessary to unlock development potential. In contrast, the Bellingham Harbor Industrial, Bellingham Haskell BP/Iowa Street, and Irongate industrial areas, all within incorporated areas, comprise a notable number of properties that may offer easier redevelopment opportunities due to the existence of infrastructure and improvements already in place.

Figure 4 4. Net Developable Land by Industrial District



Source: *Whatcom County, MFA*

4.4 COUNTYWIDE DEVELOPABLE INDUSTRIAL LAND ASSESSMENT

Following the identification of net developable industrial acreage, a comprehensive evaluation was conducted to assess both the timing and probability of future industrial development across the county and within each designated study area. This analysis resulted in the classification of properties into development categories, as outlined in Section 4.1.5, based on their readiness, constraints, and strategic potential.

Property Acreage Adjustments

In addition to assigning development categories to developable properties in each industrial area during the industrial land assessment process, property-specific net property acreage adjustments were made based on insights gathered through the detailed property-level analysis. These adjustments reflect real-world conditions that affect development potential and resulted in either increases or decreases in the amount of net developable land compared to the original assessor data. Table 4-4 summarizes these adjustments, providing a description and justification of the differences between the initial land inventory and the reconciled figures. This reconciliation process ensures that the final estimates of net developable land more accurately reflect current on-the-ground conditions and development readiness.

Table 4-4. Acreage Adjustments

Property Name	Industrial Area	Development Window	Adjustment	Note
Laut Properties LLC	Bellingham Irongate	Long-Term	+10 acres	The property owner is currently marketing 10 acres of industrial land that was previously considered undevelopable due to wetland constraints. Recent assessments suggest that development may be feasible; however, opening new opportunities for industrial use
Port Airfield Property	Airport Industrial	Near-Term	- 285 acres	Developable land of the Port's airport property is outlined in the 2019 Bellingham International Airport Master Plan. The total area targeted for aviation supporting industrial redevelopment amounts to approximately 35 acres.
Port All American Marine	Bellingham Harbor Industrial	Long-Term	+15 acres	A portion of the existing ASB pond will be filled to support roughly 15 acres of future marine-supportive industrial upland development.
Port Harbor Ind west of Boardman	Bellingham Harbor Industrial	Long-Term	+18.4 acres	A redevelopment plan envisions redevelopment of underutilized space on the property for industrial uses.

Source
Whatcom County; MFA

Developable Industrial Land by Development Category

Figure 4-5 shows the distribution of developable industrial land by property size and their associated development category, omitting properties deemed unlikely for redevelopment. The resulting adjusted net acres totals 2.431 acres on 396 properties.

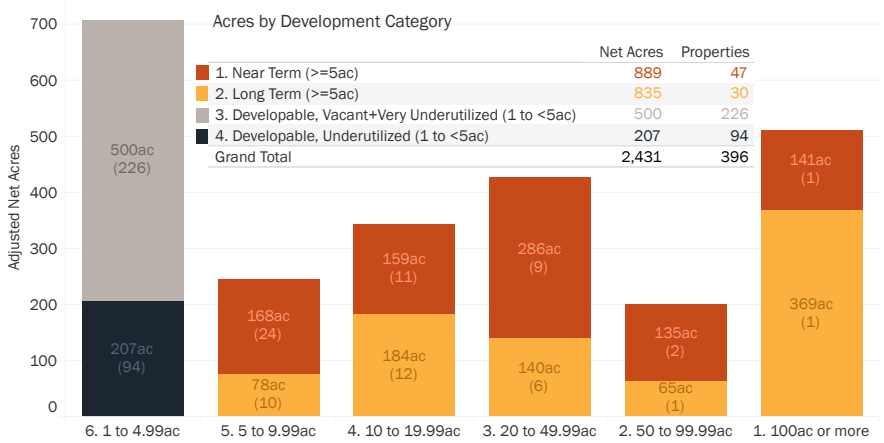
Properties More than One Acre and Less than Five Acres

- 81 percent of the properties (320 out of 396), representing 29 percent of the total net acreage (707 acres of 2,431 acres), are in the 1-to-4.99-acre range.
- 94 of the properties in the 1-to-4.99-acre range, accounting for 207 acres, are underutilized but improved with a building that may have a going business concern. These are more likely to be longer-term development properties.
- There are 226 properties totaling 500 acres in the 1-to-4.99-acre range that are vacant or very underutilized.

Properties Five Acres or More

- **Properties in the 5–9.99 acre range:** 24 properties totaling 168 net acres are identified for near-term development, and 10 properties totaling 78 acres are designated for long-term development.
- **Properties in the 10–19.99 acre range:** 11 properties totaling 159 net acres are identified to have near-term development potential, while 12 properties totaling 184 net acres are identified as having long-term development potential.
- **Properties in the 20–49.99 acre range:** There are nine near-term and six long-term properties in this category, totaling 286 and 140 net acres, respectively.
- **Properties in the 50–99.99 acre range:** There are two near-term properties and one long-term property in this category, totaling 135 and 65 net acres, respectively.
- **Properties 100 acres or more:** Only one property over 100 acres is currently identified for near-term use, highlighting the relative scarcity of very large development-ready industrial sites in the region. Given the location, lack of utilities, and ownership of this property (Cherry Point/Alta Gas), the timeline for any development activity is at the end of the near-term time frame, or in five years, if development planning starts in 2025. One property over 100 acres has long-term development, the 369 acres of Alta Gas owned land surrounding the former Inalco smelter property.

Figure 4-5. Net Acreage and Property Count of Developable Properties by Property Size



Source: *Whatcom County, MFA*

4.5 INDUSTRIAL STUDY AREA DEVELOPABLE INDUSTRIAL LAND ASSESSMENT

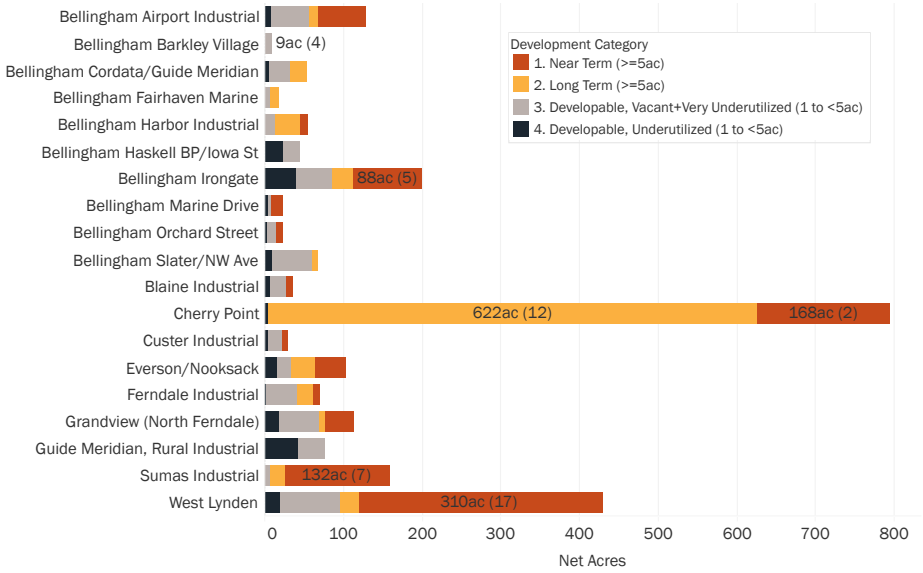
Industrial development, whether purpose-built by an owner/user or speculative for multiple tenants, is most likely to happen where there is reliable access to freight and utilities. This section analyzes the distribution of developable industrial lands by development category across the industrial study areas based on these two key factors, freight access and utility availability.

4.5.1 Industrial Land by Development Category

Figure 4-6 provides a breakdown of developable industrial land across various districts by development readiness. Cherry

Point has 168 acres designated as near-term development, highlighting its strategic importance for future industrial growth while acknowledging there are existing access, infrastructure, critical area, and cultural resource challenges in much of this area. While acknowledging these limitations with the properties identified as near-term, Cherry Point also has 622 acres of long-term development land, more than all other study areas combined. West Lynden also shows strong near-term potential, with 310 acres ready for development, making it another key area for immediate investment. Sumas Industrial also has a notable near-term development capacity with 132 acres.

Figure 4-6. Net Acreage of Developable Properties by Industrial Area



Acres by Development Category

	Net Acres		Properties		Total Combined	Net Acres	Properties
1. Near Term (>=5ac)	889		47			889	47
2. Long Term (>=5ac)	835		30			835	30
3. Developable, Vacant+Very Underutilized (1 to <5..		500		226		500	226
4. Developable, Underutilized (1 to <5ac)		207		94		207	94
Grand Total	1,724	707	76	320		2,431	396

Source: *Whatcom County, Port, MFA*

The Bellingham Airport Industrial Area shows a notable reduction in available acreage from the land inventory, with only 61 acres designated for near-term development and 11 acres for long-term, down from the 552 acres of net developable land identified in the land inventory. This is due to development restrictions related to wetlands and Federal Aviation Administration runway protection zones at either end of the runway that regulate building location and allowed height.

The Bellingham Haskell BP/Iowa Street Industrial Area stands out for having only developable properties under five acres, totaling 45 acres, indicating a lack of larger development-ready properties but an abundance of smaller industrial properties. Other industrial study areas with notable developable industrial land between one and five acres include Bellingham Airport Industrial, Bellingham Haskell BP/Iowa St, Bellingham Irongate, Bellingham Slater/NW Ave, Grandview, and Guide Meridian Rural Industrial.

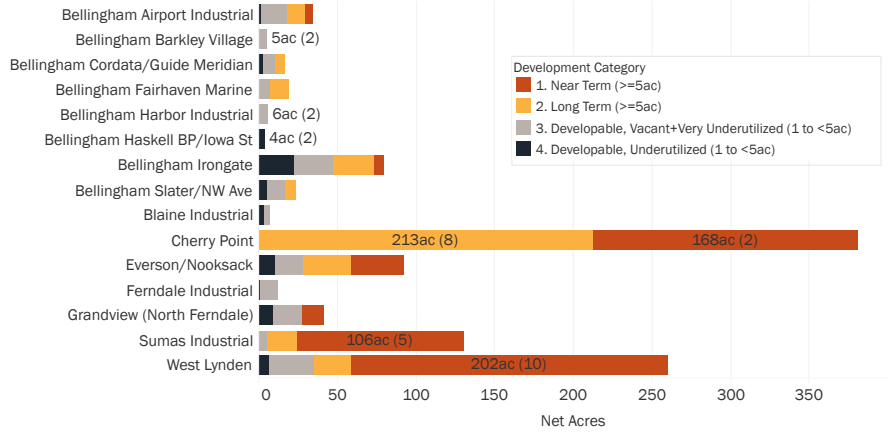
Figure 4-6 shows that 889 acres (37 percent) of the total 2,431 net acres are classified as near-term development, while developable properties under five acres (707 acres) still represent a large portion of the inventory. Long-term development-ready parcels account for 835 acres.

4.5.2 INDUSTRIAL LAND ALONG TRUCK FREIGHT CORRIDORS

Almost all industrial users rely on transportation corridors that can reliably move freight. Truck corridors are the primary, and most flexible, mode for accessing near and long-distance supply chain connections and distribution markets followed by rail and waterways. Every two years, The Washington State Department of Transportation designates and updates the Freight and Goods Transportation System (FGTS) to meet state legislative requirements, support transportation planning processes, and inform freight investment decisions. The FGTS is a classification system of multimodal freight corridors classifies freight corridors for truck, rail, and waterways based on annual freight tonnage. The FGTS is unique to Washington state.

Overall, there are 246 developable properties, totaling acres, along a truck freight corridor. This filter excludes 150 properties, totaling 1,114 acres, that are not along a corridor. These 150 properties represent areas where freight corridor reclassification and road improvements to support the freight transportation investments could unlock additional industrial development capacity. Figure 4.7 summarizes the net acres by industrial area, that have property frontage along a truck freight corridor.

Figure 4-7. Net Acreage of Developable Properties by Industrial Area, along a Truck Freight Corridor



Acres by Development Category

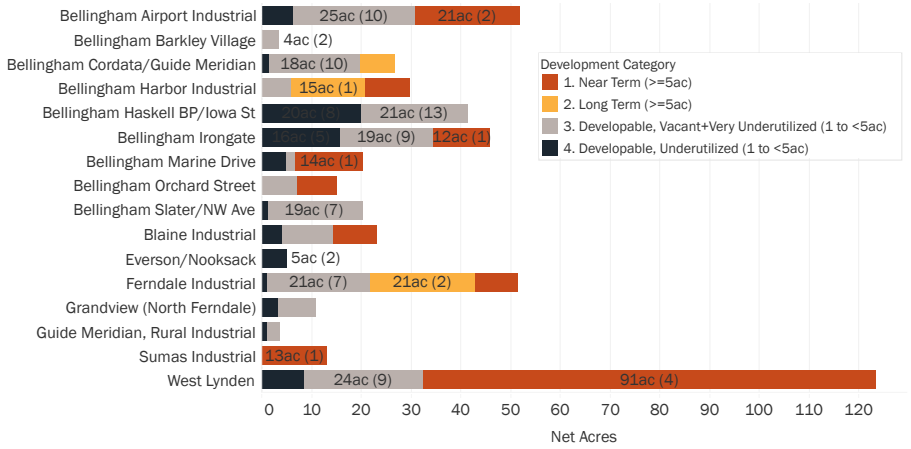
	Net Acres		Properties		Total Combined	Net Acres	Properties
1. Near Term (>=5ac)	355		24			355	24
2. Long Term (>=5ac)	487		11			487	11
3. Developable, Vacant+Very Underutilized (1 to <5..		335		149		335	149
4. Developable, Underutilized (1 to <5ac)		140		62		140	62
Grand Total	842	476	35	211		1,317	246

Source: *Whatcom County, Port, MFA*

4.5.3 INDUSTRIAL LAND ALONG TRUCK FREIGHT CORRIDORS AND FULLY SERVED

Utility access is a critical indicator of site readiness and development potential. A property is considered fully served when it has access to essential infrastructure, including water, sewer, and power. Figure 4-8 illustrates the net acreage of properties by industrial area that are along a freight corridor and fully served.

Figure 4-8. Net Acreage of Developable Properties by Industrial Area, along a Freight Corridor and Fully Served



Acres by Development Category

	Net Acres		Properties		Total Combined	Net Acres	Properties
1. Near Term (>=5ac)	184		13			184	13
2. Long Term (>=5ac)	43		4			43	4
3. Developable, Vacant+Very Underutilized (1 to <5..		184		84		184	84
4. Developable, Underutilized (1 to <5ac)		73		32		73	32
Grand Total	228	257	17	116		485	133

Source: *Whatcom County, Port, MFA*

After filtering the developable industrial land inventory to include only fully served properties along a truck freight corridor, the available acreage is reduced to a total of 485 net acres. West Lynden has the most utility-ready area, offering the largest amount of near-term, fully served industrial land (123 net acres). Additionally, the analysis reveals that developable properties under five acres account for 53 percent of the 485 net acres, or 257 net acres. In contrast, Cherry Point—the area with the largest near- and long-term development potential—has no fully served acreage due to its location in unincorporated Whatcom County, where utility infrastructure is limited.

4.5.4 INDUSTRIAL LAND ALONG TRUCK FREIGHT CORRIDOR AND PROXIMATE TO AN I-5 INTERCHANGE

Proximity to I-5—the only Tier 1 freight corridor (that is a corridor carrying more than 10 million tons carried per year) in Whatcom County—is a critical factor in supporting industrial development in Whatcom County. The information presented in Figure 4-9 shows the net acres and property count of developable industrially zoned land that is along a truck freight corridor and located within one-half mile of an I-5 interchange.

Figure 4-9. Net Acreage of Developable Properties by Industrial Area, Proximate to an I-5 Interchange

Acres by Development Category

	Net Acres		Properties		q Total Combined	Net Acres	Properties
1. Near Term (>=5ac)	111		8			111	8
2. Long Term (>=5ac)	29		3			29	3
3. Developable, Vacant+Very Underutilized (1 to <5..		179		78		179	78
4. Developable, Underutilized (1 to <5ac)		45		20		45	20
Grand Total	140	224	11	98		364	109

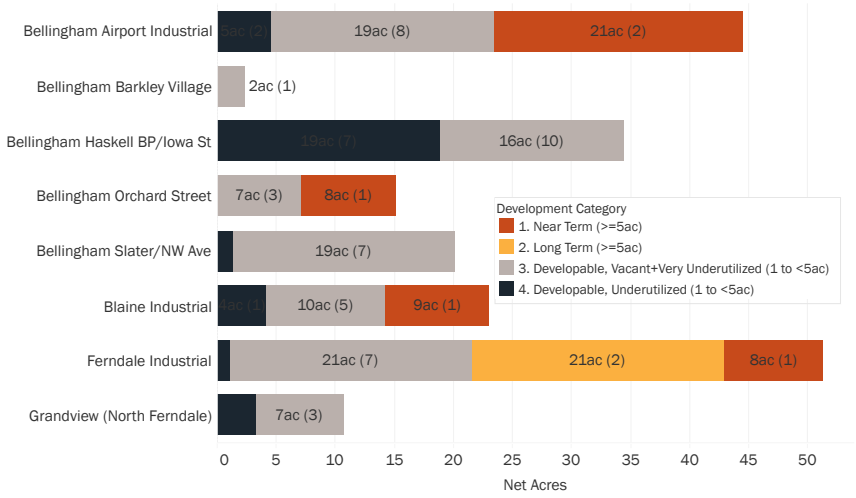
Source: *Whatcom County, Port, MFA*

For industrial users that value freight reliability, where the overlapping filters of freight corridor frontage and proximity to an I-5 interchange are required, there are 109 properties totaling 364 acres that match these criteria. Only 11 of these properties are greater than 5 acres in area. Many industrially zoned properties are filtered out under this scenario, including Cherry Point, West Lynden, and Sumas.

4.5.5 INDUSTRIAL LAND ALONG A TRUCK FREIGHT CORRIDOR, FULLY SERVED, AND PROXIMATE TO AN I-5 INTERCHANGE

Prime industrially zoned land is located along a freight corridor, near I-5, and fully served. Not surprisingly, the options fitting this profile are limited. In total, there are 65 properties totaling 201 acres matching these criteria. Only seven properties, totaling 68 acres, are five acres or greater. Figure 4-10 illustrates the output from applying these filters by industrial area.

Figure 4-10. Net Acreage of Developable Properties by Industrial Area, along a Freight Corridor, Proximate to an I-5 Interchange, and Fully Served



Acres by Development Category

	Net Acres		Properties		q Total Combined	Net Acres	Properties
1. Near Term (>=5ac)	46		5			46	5
2. Long Term (>=5ac)	21		2			21	2
3. Developable, Vacant+Very Underutilized (1 to <5..		101		44		101	44
4. Developable, Underutilized (1 to <5ac)		33		14		33	14
Grand Total	68	134	7	58		201	65

Source: *Whatcom County, Port, MFA*

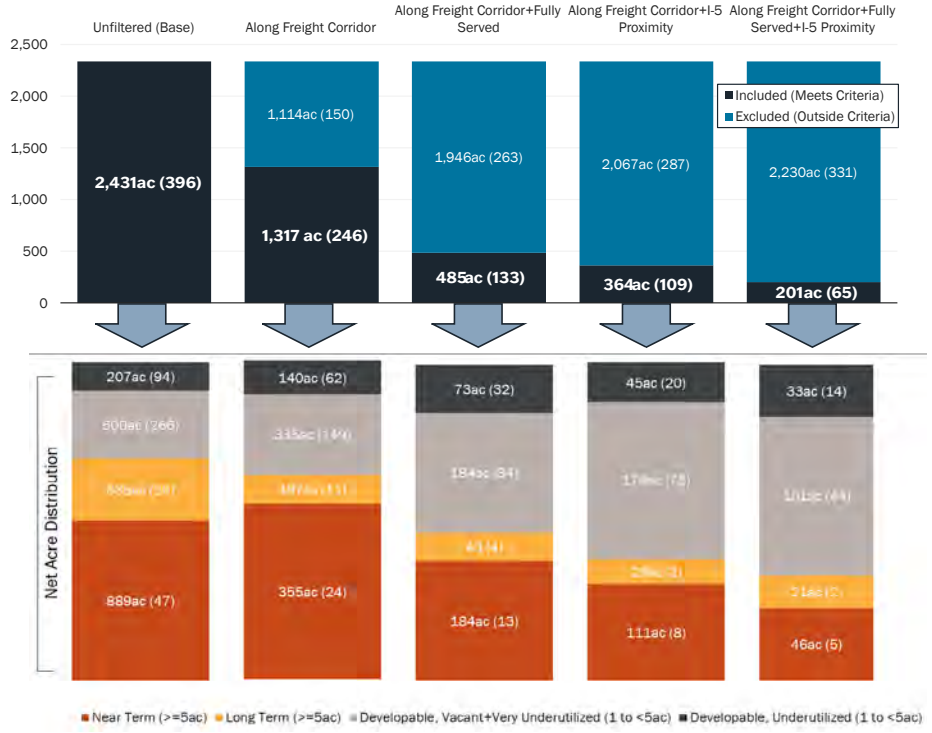
4.6 SUMMARY OF LAND INVENTORY AND DEVELOPABLE INDUSTRIAL LAND ASSESSMENT

Based on utilization categories of industrially zoned properties across Whatcom County and its municipalities, there are approximately 3,387 acres of net developable land (either vacant, very underutilized, or underutilized) currently zoned for industrial use. However, after applying more site-specific analysis in the developable industrial land assessment—considering zoning constraints, existing uses, critical areas, and inhibiting property-level characteristics—the total is reduced to 2,431 acres. This refined inventory includes 889 acres designated for near-term development, 835 acres for long-term development, 500 acres between one and five acres that are vacant or very underutilized, and 207 between one and five acres that are vacant or very underutilized.

Figure 4-11 demonstrates the refinement of the inventory. The upper bar chart represents the total unfiltered developable industrial land; the lower bar chart shows the distribution by utilization category. The four sets of columns on the right side of Figure 4-11 depict the net acre distribution for the properties that meet the filter criteria (e.g., along a freight corridor, fully served by utilities, near an I-5 corridor or a mix of these factors). Key observations include the following:

- 1,317 acres on 246 properties are along a freight corridor. There are 150 properties totaling 1,114 acres that are industrially zoned and not along a freight corridor. Future freight routes may warrant consideration.
  - The lower chart shows that 355 net acres on 24 properties totaling at least five acres meet this criterion and have near-term potential. A total of 335 acres on 149 properties are under five acres and are vacant or very underutilized.
- The number of properties that may suit a manufacturer or industrial investor's location requirements decreases when other key location factors such as utility services and interstate access are considered, particularly if the search requires land that is at least five acres.
- What Figure 4-11 does not show is where these opportunities are within each industrial area. The set of maps with area-specific data and notes found in Appendix F provide a detailed look at the developable properties at the industrial area level.

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



Source: *Whatcom County, Port, MFA*

5. Reconciliation Analysis

The reconciliation analysis estimates industrial land needs through 2045 under four industrial employment growth scenarios and then balances the range of potential industrial land needs with the current inventory of net developable industrial land. The scenarios are rooted in the middle, middle-high, and high employment growth projections provided by the County and used in the DEIS for its 2025 Comprehensive Plan Update summarized in Section 1.

5.1 INDUSTRIAL EMPLOYMENT GROWTH SCENARIOS

The County's overall employment projections also isolate industrial employment growth projections as described in Table 1-3. Industrial employment comprises the major industry sectors listed in Table 5-1. This table also provides employment data points for each major industrial sector. In 2023 the manufacturing sector accounted for 42 percent of industrial employment but had grown at an annual rate of 0.14 percent between 2013 and 2023, considerably slower than other major sectors. Construction sector jobs grew at the greatest rate and captured most of the growth.

Table 5-1. Industrial Employment Major Industry Sectors

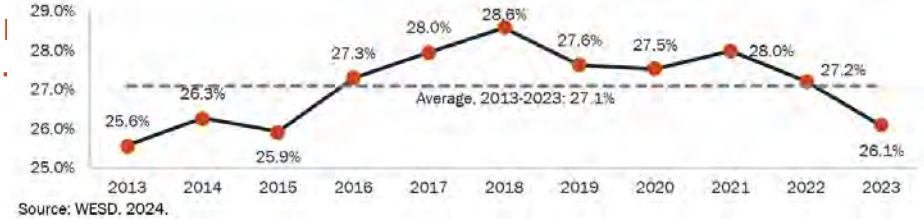
2-Digit NAICS Code	Major Industry Sector	Industry Sector Type	2023 Job Distribution	2013–2023 Metrics		
				Annual Growth Rate	Job Growth	Industry Share of Growth
22	Utilities	Good producing	–	–	–	–
23	Construction	Good producing	36%	4.63%	2,867	88.6%
31-33	Manufacturing	Good producing	42%	0.14%	130	4.0%
42	Wholesale trade	Service providing	13%	0.70%	181	5.6%
48-49	Transportation and warehousing	Service providing	10%	0.27%	57	1.8%

Notes
NAICS = North American Industry Classification System.
This analysis excludes jobs classified in the Utilities major industry sector (NAICS 22). The Utilities sector accounts for less than one percent of total industrial employment in Whatcom County.

Source
Sector Categories: Leland Consulting Group. 2024. *Whatcom County Comprehensive Plan Population and Employment: Growth Projections and Preliminary Allocations.*
Employment Data: QWEC

5.1.1 Historical Industrial Employment Growth Trends

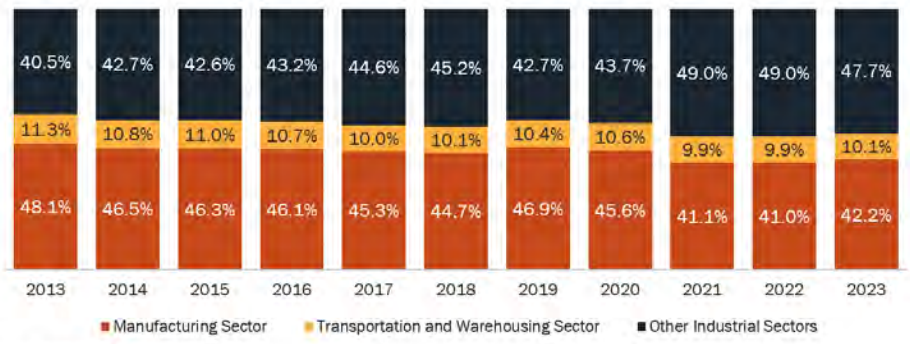
To estimate employment growth, the 2025 Comprehensive Plan Update uses the 2023 industrial jobs to total jobs capture rate of 26.1 percent for all of the scenarios. Figure 5-1 shows that this rate has varied since 2013 and the average capture rate between 2013 and 2023 is 27.1 percent (County 2025).



Source: WESD, 2024.

As illustrated in Table 5-1, industrial employment is made up of five industry sectors, but the utility sector is excluded from this part of the analysis. The chart in Figure 5-2 shows the distribution of the manufacturing sector, transportation and warehousing sector, and the combined construction and wholesale trade sectors jobs within industrial employment. In the period preceding COVID-19 (i.e., 2013 to 2020) manufacturing sector jobs consistently averaged 46.2 percent of total industrial jobs and only once, in 2018, were under 45 percent in that pre-COVID period.

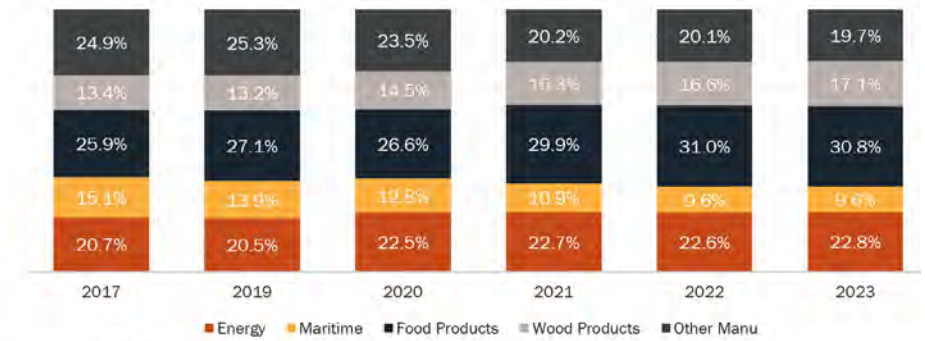
Figure 5-2. Industrial Employment Capture Rate by Sector, 2013–2023



Source: WESD, 2024.

Within the manufacturing sector, energy-, maritime-, food product-, and wood product-related industries, employment trends were isolated to further inform land use needs based on employment projections for each scenario. Figure 5-3 shows the distribution for 2017 and 2019 through 2023. Years were not included if there was an insufficient number of firms for at least one of the industries to publish employment data in that year.

Figure 5-3. Manufacturing Sector Employment Capture Rate by Industry, 2017, 2019–2023



Source: WESD, 2024

5.1.2 EMPLOYMENT GROWTH SCENARIO ASSUMPTIONS

The key assumptions used to develop industrial employment growth scenarios are summarized in Table 5-2. All four scenarios use the total growth employment estimates prepared for the 2025 Comprehensive Plan Update DEIS. Scenario 1 and Scenario 2a use the same industrial employment capture rate of 26.1 percent; Scenario 2b assumes that industrial jobs in 2045 will have a capture rate of 27.1 precent, which is equivalent to the 2013 to 2023 average capturer rate. Scenario 3, the High scenario, assumes the high capture rate of industrial jobs of 28.6 percent, which is the capture rate observed in 2018 (see Figure 5-1).

Table 5-2. Industrial Employment Growth Scenario Assumptions

	Scenario 1 Middle	Scenario 2a Middle-High	Scenario 2b Middle-High	Scenario 3 High
Total Employment Annual Growth Rate (2023–2045)	0.89%	1.15%	1.15%	1.33%
Industrial Employment Capture Rate of Total Jobs	26.1% (2023)	26.1% (2023)	27.1% (Avg. 2013-23)	28.6% (Max. 2018)
Manufacturing Sector Share of Industrial Employment	41.0% (Min. 2022)	42.2% (2023)	44.9% (Avg. 2013-23)	48.1% (Max. 2013)
Transportation and Warehousing Sector Share of Industrial Employment	9.9% (Min. 2021)	10.1% (2023)	9.9% (Min. 2021)	9.9% (Min. 2021)

Notes
Leland Consulting Group. 2024. *Whatcom County Comprehensive Plan Population and Employment: Growth Projections and Preliminary Allocations.*
WESD. 2024.

The bottom two rows in Table 5-2 show the assumptions used for estimating employment by manufacturing sector and transportation and warehousing sector. The projected manufacturing sector jobs are broken down further by manufacturing industries consistent with period used for the manufacturing sector capture rate. For example, the manufacturing sector under Scenario 1 is anticipated to capture 41.0 percent of industrial jobs. This 2022 rate is the minimum capture rate observed between 2013 and 2023. Within that set of manufacturing sector jobs, the projections further estimate the number of energy, maritime, food product, and wood product industry jobs based on the capture rates by industry in 2022 (see Figure 5-3).

5.2 ESTIMATED INDUSTRIAL LAND NEED BY SCENARIO

Estimating the number of acres needed to support industrial employment estimates is done using two key inputs: employees per building square feet and the floor area ratio (FAR). The analysis for this report applies those factors at the industry level within the manufacturing sector for the following key industries: energy, maritime, food products, and wood products in addition to other supportive industrial sectors and industries that use industrially zoned land. The transportation and warehousing sector is also included because buildings in this sector tend to be larger than most manufacturing buildings and the building square feet needed

per employee is higher. This approach enables a more detailed projection of how much manufacturing land is likely needed through 2045 because industry level metrics are used rather than applying a single metric of building square foot needed per employee and FAR input to estimate industrial land needs. Table 5-3 shows the sector and industry level metrics used to calculate building square footage needs and acreage needs based on employment growth for each scenario.

Table 5-3. Summary of Inputs Used to Estimate Industrial Building and Land Needs

Sector/Industry	Square Feet Per Employee[a]	FAR[b]
Industrial Overall	1,000	0.26
Manufacturing Sector		
Energy Industry	740	0.26
Maritime Industry	470	0.27
Food Products Industry	730	0.28
Wood Products Industry	990	0.29
All Other Manufacturing Industries	730	0.28
Transportation and Warehousing Sector		
Support Activities for Transportation	2,240	0.28
Warehousing and Storage	3,700	0.36
Other Transportation and Warehousing	1,660	0.27

Notes
FAR = floor area ratio.
NAICS = North American Industry Classification System.
[a] Based on a survey of industrial businesses listed in CoStar and Data Axle for Whatcom County and the competitive Washington counties using reported NAICS codes.
[b] Based on a survey of industrial businesses listed in CoStar for Whatcom County and the competitive Washington counties using reported NAICS codes.

5.2.1 Employment Growth Scenario Outputs

The Port aims to boost manufacturing opportunities and maintain suitable land for diverse industrial needs during the planning period. The net industrial acres needed to support the employment projections in each scenario are shown in the bottom line of Table 5-4. Total acres needed to support the industrial employment growth scenarios between 2023 and 2045 range from 587 acres under Scenario 1 to 1,261 acres under Scenario 3.

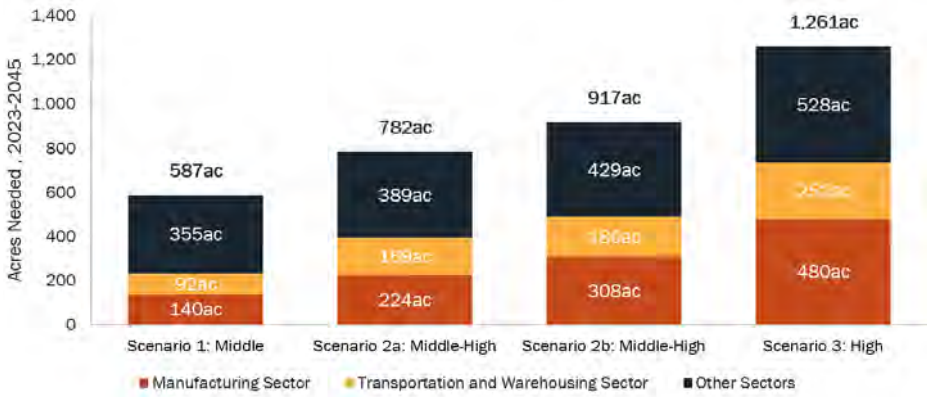
Table 5-4. Projected Land Needs for Industrial Growth Scenarios

	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.

Figure 5-4 illustrates the industrial acreage need by sector for the period between 2023 and 2045. Based on employment projections, between 140 and 480 acres will be needed for new manufacturing sector jobs.

Figure 5-4. Industrial Acre Needs by Sector, 2023-2045



The Port should support efforts to ensure there is a suitable industrial land supply range of 782 acres (Scenario 2a) to 917 acres (Scenario 2b) to accommodate the projected industrial employment growth between 2023 and 2045. To meet this

demand the industrial land supply should:

- Be concentrated along truck freight corridors that connect industrial areas to the I-5 corridor.
- Have properties available that are at least five acres in area, including a 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.
- Include a concentration of ready-to-develop industrially zoned properties within one-half-mile of an I-5 interchange.

5.3 RECONCILIATION

This analysis reveals that between 587 and 1,261 acres of industrially zoned land are needed to support the projected industrial employment scenarios. The two middle scenarios represent the more likely range of industrial employment growth and resulting industrial land supply needed to support growth between 2023 and 2045. Scenarios 2a and 2b estimate that the industrial land needed will be between 782 and 917 acres.

To achieve this projected demand, Whatcom County will need to become a destination for key industries including maritime, energy, wood products, and food products. In addition to ensuring industrial land readiness, the Port, local jurisdictions, and state and local partners will need to focus on efforts in the following areas: workforce development, target industry retention and attraction to build on the existing set of industrial clusters, and supporting the development of ownership and rental housing affordable to workers. The agencies will need to be able to answer the following question: Is there a suitable supply of land to meet this projected demand assuming Whatcom County is successful in creating an environment conducive to attracting and retaining industrial businesses in key target industries?

- **Total Industrial Land Supply:** The total unfiltered inventory of developable industrial land is 2,431 acres on 396 properties. The county appears to have a sufficient supply of industrial land to support the 917 acres of projected demand based on Scenario 2b. In a 2022 study, Community Attributes, Inc. identified a market factor that reduces the land supply by 15 to 20 percent because not all owners will move from their property during a planning period even if the property is considered developable. Even with a market factor applied to the current supply, there are over 1,800 developable acres.
- **Industrial Land along Truck Freight Corridors:** 1,317 acres on 246 properties are located along freight corridors. Industrial operations concentrate on industrially zoned land located along these corridors for efficient movement of goods produced. A 20 percent market factor may reduce this supply by 264 acres down to 1,053 acres. Based on the upper end of the land need range (917 acres, Scenario 2b) there is a sufficient supply of industrial land. It is important to note that this supply along truck freight corridors has varying degrees of readiness as summarized in the following:

Industrial Land along Truck Freight Corridors Positioned for Development

- 355 acres on 24 properties are five or more acres in area and are identified as having near-term development potential.
- 335 acres on 149 properties are more than one acre and less than five acres in area and are vacant or very underutilized.

Industrial Land Along Truck Freight Corridors with Long-Term Development Potential

- 487 acres on 11 properties are five or more acres that are identified as having long-term development potential.
- 140 acres on 62 properties are more than one acre and less than five acres and are underdeveloped. Underdeveloped for this study indicates that existing buildings on a property are valued at less than the land value, but these buildings may still support existing businesses and have longer-term development potential.
- Combined, these two groups with longer-term development

potential total 258 acres, or the approximate equivalent to the 20 percent market factor.

- **Industrial Land along Truck Freight Corridors and Fully Served:** 485 acres on 133 properties are along freight corridors and fully served with water, sewer, and power utilities. This profile of industrially zoned land represents locations that will be most attractive to industrial users and industrial developers. At 485 acres, **this key profile of land will not meet the 782 to 917 acres of industrial land needed** to support employment projections for Scenarios 2a and 2b. Without nearby utilities and/or a clear path to construction on these properties, these users will likely look elsewhere.

The industrial land supply is further challenged by a lack of properties in the county that could accommodate large-scale manufacturers (e.g., 20 or more acres). There are only 18 properties totaling 1,127 acres. Of this total, 845 acres on 12 properties are near-term and 196 acres on 6 properties are long-term. Table 5-5 provides the names of the industrial areas where the near-term and long-term properties that are at least 20 acres are located.

Table 5-5. Number of Properties 20 Acres or More by Industrial Area

	Bellingham Airport Industrial	Bellingham Irongate	Cherry Point	Grandview (North Ferndale)	Sumas Industrial	West Lynden	Everson/ Nooksack	Total
Near-Term (>=5ac)								
20 to 49.99ac	1	2	1	1	2	2		9
50 to 99.99ac						2		2
100ac or more			1					1
Subtotal	1	2	2	1	2	4	0	12
Long-Term (>=5ac)								
20 to 49.99ac			4					4
50 to 99.99ac			1					1
100ac or more								1
Subtotal	0	0	6	0	0	0	1	6
Combined Total								
20 to 49.99ac	1	2	5	1	2	2		13
50 to 99.99ac			1			2		3
100ac or more			2					2
Total	1	2	8	1	2	4	0	18

The property total is reduced from 18 to six properties countywide when limiting this set of 20 acre and greater properties to only those that have frontage along a truck freight corridor. Five of the properties have near-term development potential and one has long-term development potential.

- There is one property in the Cherry Point industrial area that exceeds 100 acres, and it requires sewer utility connections. The is the long-term property.
- The Bellingham Irongate Industrial Area has two properties fronting a truck freight corridor, both are in the 20 acre to 49.99 acre range.
- The Bellingham Airport Industrial and Grandview (North Ferndale) Industrial Areas each have one property over 20 acres, both in the 20 acre to 49.99 acre range.
- The West Lynden industrial area has one property meeting the freight corridor criterion and it is in the 50 acre to 99.99 acre range.

This analysis finds there to be enough land to meet the anticipated land needs to support industrial employment growth; however, considering location, utility readiness, and acreage bins, more needs to be done to ensure the industrial land base is usable and marketable to encourage local business growth and attract new target industry employers to Whatcom County.

6. Recommendations

Consider this hypothetical scenario: a site selector has a client that requires 30 to 60 acres of industrially zoned land that can be developed within the next three years to support a 200,000-square-foot manufacturing facility that will create 150 to 200 jobs. The site selector notes that it is important for this business to be located along a freight corridor, but it does not need rail or proximity to a highway interchange. Based on the analysis conducted to support this report, there are four properties that meet these criteria.

- The Port owns one of the properties. It is vacant; however, it is not currently served with utilities and is in a height restricted zone due to its location near the airport runway.
- One property is privately owned and located in the Cherry Point UGA, though it lacks sewer service, creating the need for time-consuming and costly infrastructure investment.
- Another privately owned property is in the Bellingham Irongate Industrial Area, and it too lacks sewer service.
- The fourth property is privately owned in the West Lynden Industrial Area. It is fully served, vacant, and fronting a freight corridor. The only outstanding question is whether the owner is willing to consider an offer to sell.

This scenario is one of many the Port regularly addresses as the county Associate Development Organization. In the above scenario, if the fourth property proved a match and the hypothetical manufacturer built on this property, the remaining supply of properties for a similar set of siting requirements would need additional infrastructure investment to be well positioned to secure this business. If investments are not made—or, at a minimum, a path is not established for how and when the infrastructure can be built—the manufacturer will look elsewhere in the region for more build-ready properties.

Many more requests for industrial land are anticipated through 2045 based on the employment projections. Between 782 acres (Scenario 2a) to 917 acres (Scenario 2b) will be needed to accommodate the projected industrial employment growth between 2023 and 2045. To meet this anticipated demand for industrial land, the Port should first ensure that the land supply:

- Be concentrated along truck freight corridors that connect industrial areas to the 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.

Key recommendations to support a ready industrial land base are:

- **Wetland Mitigation Banking:** Nearly half (48 percent or 7,190 gross acres) of industrially zoned land in Whatcom County has a wetland and an associated buffer that cannot be developed. The top three most impacted industrial areas are Cherry Point (3,293 acres), Bellingham Airport Industrial (1,033 acres), and Bellingham Slater/NW Ave (479 acres). Approximately 57 percent (2,667 acres) of the City of Bellingham's 4,674 gross acre industrial land base is impacted by wetlands. The City of Bellingham owns approximately 100 acres of property in the Bellingham Slater/NW Ave industrial area that is identified to be a wetland mitigation bank. This bank may be used to unlock industrial development potential on other properties in Bellingham impacted by wetland. In coordination with jurisdictional partners, the Port should advance the exploration of wetland mitigation banking in the City and Bellingham and other parts of the county.

- **Coordinating Port Powers with Local Jurisdictional Planning for Infrastructure:** The Port and the county jurisdictions should proactively construct utility extensions to industrial areas lacking service. This can be done by the Port alone, the jurisdictions alone, or in coordination with one another. For example, the Port can establish industrial development districts (IDDs). These are geographic districts comprising idle and underutilized lands where the Port can acquire, plan and develop, and sell properties. Additionally, the Port can make infrastructure improvements consistent with jurisdictional planning that may be financed with bonds or an IDD levy. The Port may review the status of the current IDDs and consider the creation of new IDDs in industrial areas where infrastructure construction will support new development.

Cities also construct extensions using their financing tools including Latecomers agreements or Local Improvement Districts. Cities may also prepare subarea plans and related planned action ordinances that remove administrative hurdles for private development and make industrial land in these areas more marketable. Port and local jurisdiction coordination has been successfully done by the Port in conjunction with the Bellingham Waterfront District Redevelopment project. An example of another Washington port supporting a subarea plan is the Port of Bremerton and the City of Bremerton's Puget Sound Industrial Center – Bremerton subarea plan.

A Washington State Department of Commerce Community Economic Development Board planning grant would support the assessment of infrastructure needs with each utility provider and associated delivery costs as well as the feasibility and impact that a subarea may have on the timing of development. Industrial areas that may benefit from this type of action include Grandview (North Ferndale), Cherry Point, West Lynden, Sumas, and Bellingham Irongate.

- **Improving and Extending Truck Freight Corridors:** Of the properties totaling at least five acres, 882 acres are not along a truck freight corridor but are in an industrial area. Cherry Point, West Lynden, Sumas, and Everson/Nooksack have at least 60 acres of land not along a truck freight corridor. Cherry Point and West Lynden each have over 200 acres. Every two years the Washington State Department of Transportation designates and updates the Freight and Goods Transportation System. The purpose of the update is to classify multimodal freight corridors for trucks, rail, and waterways based on annual freight tonnage, which is used to support transportation planning processes and inform freight investment decisions. This is mandated by state legislative requirements. The Port should actively coordinate with the Whatcom Council of Governments, the county lead on this effort, to ensure that industrial areas have reliable truck corridors to meet future demand. A map showing land that is along, and not along, truck freight corridors can be found in Appendix D.
- **Facilitating Regulatory Consistency:** Collaborate with the County and local jurisdictions to clarify industrial land uses in zoning districts designated for industrial development. This process involves eliminating nonindustrial uses permitted by right in each industrial zone, as well as uses categorized as industrial that do not contribute high-demand or high-wage jobs or align with target industries. Additionally, the Port may recommend regulatory changes aimed at ensuring greater consistency among the County and jurisdictions regarding industrial project code review and permit approval processes.
- **Land for Emerging and Growing Target Industry Businesses:** In addition to ensuring a supply of ready industrial land that is at least 20 acres for large-scale industrial users, properties that are in the one-to-five-acre range are an important part of the industrial land mix. While these properties are not likely to attract large-scale manufacturers and institutional industrial developers; these properties play a vital role in supporting emerging and growing industrial operations that are essential to the county's manufacturing ecosystem. Cities may facilitate industrial development on developable properties through continued accessible data sharing to provide readily available due diligence information. The Port may be proactive with these property owners by levering its brownfield knowledge base and/or conducting surveys to understand willingness to listen to sale offers or explore redevelopment options.

- **Active Comprehensive Planning Involvement:** The Port should continue to be an active participant in the comprehensive planning and land use modification process, whether it be for adding land into the industrial land base or protecting land that is being considered for redesignation from industrial use. The Port should support land use changes and UGA expansions that facilitate industrial development including the following:
  - Along I-5 between the north end of the Ferndale UGA and Bellingham including the area east of I-5 between the Grandview (North Ferndale) industrial area and the Ferndale industrial area.
  - South and east of the south end of the Blaine UGA, acknowledging that wetland mitigation will be needed.
  - The area northeast of the Columbia Valley UGA, which could support small-scale industrial development or resource-based industries.
  - Ferndale, east of I-5 in the Grandview (North Ferndale) industrial area.

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Limitations

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Appendix A

Target Industry NAICS Codes

Target Industry Definitions

Overview

This appendix provide the framework that delineates target industries within Whatcom County in support of the Whatcom County Industrial Lands and Employment Study. Each target industry is characterized by a collection of two- and six-digit NAICS (North American Industry Classification System) codes, which provide a detailed classification of the industries involved. The definitions of these industies, as outlined in this appendix, will serve as a reference for conducting comprehensive employment analyses. Definitions are listed below.

Sector	A sector is a broader classification that encompasses multiple industries. The first two digits of a NAICS code indicate the sector, such as manufacturing or retail.
Industry	Industries are comprised of businesses and organizations involved in similar or related types of production or services. Businesses are classified using a NAICS code based on their primary activity, which is generally the activity that generates the most revenue for the establishment. Three, four, five, and six digit NAICS codes further refine this classification into subsectors, industry groups, specific industries, and national industries, respectively.
Cluster or Traded Cluster	An industrial cluster is a geographic concentration of interconnected businesses, suppliers, and associated institutions in a particular field.

Maritime

Maritime industrial businesses are those that operate within the broader maritime industry, focusing on activities related to the transportation of goods and people across waterways, as well as services and operations that support marine activities. These businesses often include shipping companies, shipbuilding and repair facilities, ports and terminals, fishing operations, and marine equipment manufacturing, and offshore energy production. Whatcom County benefits from its numerous marine-industrial areas, which provide extensive opportunities for maritime-related activities. The maritime industrial sector consists of the following industries.

Sector Code	Sector Description	National Industry Code	National Industry Title	National Industry Description
31-33	Manufacturing	314994	Rope, Cordage, Twine, Tire Cord, and Tire Fabric Mills	This U.S. industry comprises establishments primarily engaged in (1) manufacturing rope, cable, cordage, twine, and related products from all materials (e.g., abaca, sisal, henequen, cotton, paper, jute, flax, manmade fibers including glass) and/or (2) manufacturing cord and fabric of polyester, rayon, cotton, glass, steel, or other materials for use in reinforcing rubber tires, industrial belting, and similar uses.
31-33	Manufacturing	336611	Ship Building and Repairing	This U.S. industry comprises establishments primarily engaged in operating shipyards. Shipyards are fixed facilities with drydocks and fabrication equipment capable of building a ship, defined as watercraft typically suitable or intended for other than personal or recreational use. Activities of shipyards include the construction of ships, their repair, conversion and alteration, the production of prefabricated ship and barge sections, and specialized services, such as ship scaling.Illustrative Examples:Barge buildingCargo ship buildingDrilling and production platforms, floating, oil and gas, buildingPassenger ship buildingSubmarine buildingYachts built in shipyards
31-33	Manufacturing	336612	Boat Building	This U.S. industry comprises establishments primarily engaged in building boats. Boats are defined as watercraft not built in shipyards and typically of the type suitable or intended for personal use. Included in this industry are establishments that manufacture heavy-duty inflatable rubber or inflatable plastic boats (RIBs).Illustrative Examples:Inflatable plastic boats, heavy-duty, manufacturingInflatable rubber boats, heavy-duty, manufacturingBoats (e.g., motorboats, rowboats, canoes, kayaks) manufacturingRigid inflatable boats (RIBs) manufacturingSailboat building, not done in shipyardsYacht building, not done in shipyards
48-49	Transportation and Warehousing	488310	Port and Harbor Operations	This industry comprises establishments primarily engaged in operating ports, harbors (including docking and pier facilities), or canals.
48-49	Transportation and Warehousing	488320	Marine Cargo Handling	This industry comprises establishments primarily engaged in providing stevedoring and other marine cargo handling services (except warehousing).
48-49	Transportation and Warehousing	488330	Navigational Services to Shipping	This industry comprises establishments primarily engaged in providing navigational services to shipping. Marine salvage establishments are included in this industry.Illustrative Examples:Docking and undocking marine vessel servicesPiloting services, water transportationMarine vessel traffic reporting servicesTugboat services, harbor operation
48-49	Transportation and Warehousing	488390	Other Support Activities for Water Transportation	This industry comprises establishments primarily engaged in providing services to water transportation (except port and harbor operations; marine cargo handling services; and navigational services to shipping).Illustrative Examples:Floating drydocks (i.e., routine repair and maintenance of ships)Ship scaling servicesMarine cargo checkers and surveyors

Wood Products

The wood products industry encompasses businesses involved in the harvesting, processing, and manufacturing of wood and wood-based materials. This industry processes materials harvested in forestry and logging operations to produce a variety of products such as lumber, plywood, particleboard, veneer, and engineered wood products. The existing Whatcom County wood products industry includes mass timber, paper products, offsite construction, and door making. In addition to structural and construction materials, the industry also includes the production of furniture, cabinetry, wood flooring, paper, and packaging materials. Companies in this sector often focus on maximizing efficiency and sustainability by utilizing byproducts, such as wood chips and sawdust, for energy production or secondary products like fiberboard and mulch. The wood products industry plays a vital role in supporting construction, manufacturing, and various consumer goods markets, while also contributing to rural economies and offering employment opportunities. The wood products industrial sector consists of the following industries.

Sector Code	Sector Description	National Industry Code	National Industry Title	National Industry Description
11	Agriculture, Forestry, Fishing and Hunting	113110	Timber Tract Operations	This industry comprises establishments primarily engaged in the operation of timber tracts for the purpose of selling standing timber.
11	Agriculture, Forestry, Fishing and Hunting	113210	Forest Nurseries and Gathering of Forest Products	This industry comprises establishments primarily engaged in (1) growing trees for reforestation and/or (2) gathering forest products, such as gums, barks, balsam needles, rhizomes, fibers, Spanish moss, ginseng, and truffles.
11	Agriculture, Forestry, Fishing and Hunting	113310	Logging	This industry comprises establishments primarily engaged in one or more of the following: (1) cutting timber; (2) cutting and transporting timber; and (3) producing wood chips in the field.
31-33	Manufacturing	321113	Sawmills	This U.S. industry comprises establishments primarily engaged in sawing dimension lumber, boards, beams, timbers, poles, ties, shingles, shakes, siding, and wood chips from logs or bolts. Sawmills may plane the rough lumber that they make with a planing machine to achieve smoothness and uniformity of size.
31-33	Manufacturing	321114	Wood Preservation	This U.S. industry comprises establishments primarily engaged in (1) treating wood sawed, planed, or shaped in other establishments with creosote or other preservatives, such as alkaline copper quat, copper azole, and sodium borates, to prevent decay and to protect against fire and insects and/or (2) sawing round wood poles, pilings, and posts and treating them with preservatives.
31-33	Manufacturing	321211	Hardwood Veneer and Plywood Manufacturing	This U.S. industry comprises establishments primarily engaged in manufacturing hardwood veneer and/or hardwood plywood.
31-33	Manufacturing	321212	Softwood Veneer and Plywood Manufacturing	This U.S. industry comprises establishments primarily engaged in manufacturing softwood veneer and/or softwood plywood.
31-33	Manufacturing	321215	Engineered Wood Member Manufacturing	This U.S. industry comprises establishments primarily engaged in manufacturing fabricated or laminated wood arches, wood roof and floor trusses, and/or other fabricated or laminated wood structural members.Illustrative Examples:Finger joint lumber manufacturingI-joists, wood, fabricatingLaminated veneer lumber (LVL) manufacturingParallel strand lumber manufacturingTimbers, structural, glue laminated or pre-engineered wood, manufacturingTrusses, wood roof or floor, manufacturing
31-33	Manufacturing	321219	Reconstituted Wood Product Manufacturing	This U.S. industry comprises establishments primarily engaged in manufacturing reconstituted wood sheets and boards.Illustrative Examples:Medium density fiberboard (MDF) manufacturingOriented strandboard (OSB) manufacturingParticleboard manufacturingReconstituted wood sheets and boards manufacturingWaferboard manufacturing
31-33	Manufacturing	321911	Wood Window and Door Manufacturing	This U.S. industry comprises establishments primarily engaged in manufacturing window and door units, sash, window and door frames, and doors from wood or wood clad with metal or plastics.
31-33	Manufacturing	321912	Cut Stock, Resawing Lumber, and Planing	This U.S. industry comprises establishments primarily engaged in one or more of the following: (1) manufacturing dimension lumber from purchased lumber; (2) manufacturing dimension stock (i.e., shapes) or cut stock; (3) resawing the output of sawmills; and (4) planing purchased lumber. These establishments generally use woodworking machinery, such as jointers, planers, lathes, and routers to shape wood.
31-33	Manufacturing	321918	Other Millwork (including Flooring)	This U.S. industry comprises establishments primarily engaged in manufacturing millwork (except wood windows, wood doors, and cut stock).Illustrative Examples: Clear and finger joint wood moldings manufacturing, Decorative wood moldings (e.g., base, chair rail, crown, shoe) manufacturing, Ornamental woodwork (e.g., cornices, mantel) manufacturing Planing mills, millwork Stairwork (e.g., newel posts, railings, stairs, staircases), wood, manufacturing, Wood flooring manufacturing, Wood shutters manufacturing
31-33	Manufacturing	321920	Wood Container and Pallet Manufacturing	This industry comprises establishments primarily engaged in manufacturing wood pallets, wood box shook, wood boxes, other wood containers, and wood parts for pallets and containers.
31-33	Manufacturing	321991	Manufactured Home (Mobile Home) Manufacturing	This U.S. industry comprises establishments primarily engaged in making manufactured homes (i.e., mobile homes) and nonresidential mobile buildings. Manufactured homes are designed to accept permanent water, sewer, and utility connections and although equipped with wheels, they are not intended for regular highway movement.
31-33	Manufacturing	321992	Prefabricated Wood Building Manufacturing	This U.S. industry comprises establishments primarily engaged in manufacturing prefabricated wood buildings and wood sections and panels for prefabricated wood buildings.

Wood Products

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Sector Code	Sector Description	National Industry Code	National Industry Title	National Industry Description
31-33	Manufacturing	321999	All Other Miscellaneous Wood Product Manufacturing	This U.S. industry comprises establishments primarily engaged in manufacturing wood products (except establishments operating sawmills and preservation facilities; establishments manufacturing veneer, engineered wood products, millwork, wood containers, pallets, and wood container parts; and establishments making manufactured homes (i.e., mobile homes) and prefabricated buildings and components). Illustrative Examples: Cabinets (i.e., housings), wood (e.g., sewing machines, stereo, television), manufacturing, Cork products (except gaskets) manufacturing, Kiln drying lumber, Shoe trees manufacturing, Wood dowels manufacturing, Wood extension ladders manufacturing, Wood handles (e.g., broom, handtool, mop) manufacturing, Wood kitchenware manufacturing, Wood stepladders manufacturing, Wood toilet seats manufacturing, Wood toothpicks manufacturing
31-33	Manufacturing	322110	Pulp Mills	This industry comprises establishments primarily engaged in manufacturing pulp without manufacturing paper or paperboard. The pulp is made by separating the cellulose fibers from the other impurities in wood or other materials, such as used or recycled rags, linters, scrap paper, and straw.
31-33	Manufacturing	322120	Paper Mills	This industry comprises establishments primarily engaged in manufacturing paper from pulp. These establishments may manufacture or purchase pulp. In addition, the establishments may convert the paper they make. The activity of making paper classifies an establishment into this industry regardless of the output.
31-33	Manufacturing	322130	Paperboard Mills	This industry comprises establishments primarily engaged in manufacturing paperboard (e.g., can/drum stock, container board, corrugating medium, folding carton stock, linerboard, tube) from pulp. These establishments may manufacture or purchase pulp. In addition, the establishments may also convert the paperboard they make.
31-33	Manufacturing	322211	Corrugated and Solid Fiber Box Manufacturing	This U.S. industry comprises establishments primarily engaged in laminating purchased paper or paperboard into corrugated or solid fiber boxes and related products, such as pads, partitions, pallets, and corrugated paper without manufacturing paperboard. These boxes are generally used for shipping.
31-33	Manufacturing	322212	Folding Paperboard Box Manufacturing	This U.S. industry comprises establishments primarily engaged in converting paperboard (except corrugated) into folding paperboard boxes without manufacturing paper and paperboard.
31-33	Manufacturing	322219	Other Paperboard Container Manufacturing	This U.S. industry comprises establishments primarily engaged in converting paperboard into paperboard containers (except corrugated, solid fiber, and folding paperboard boxes) without manufacturing paperboard.Illustrative Examples:Fiber cans and drums (i.e., all-fiber, nonfiber ends of any material) made from purchased paperboardMilk cartons made from purchased paper or paperboardSanitary food containers (except folding) made from purchased paper or paperboard Setup (i.e., not shipped flat) boxes made from purchased paperboard
31-33	Manufacturing	322220	Paper Bag and Coated and Treated Paper Manufacturing	This industry comprises establishments primarily engaged in one or more of the following: (1) cutting and coating paper and paperboard; (2) cutting and laminating paper, paperboard, and other flexible materials (except plastics film to plastics film); (3) manufacturing bags, multiwall bags, sacks of paper, metal foil, coated paper, laminates, or coated combinations of paper and foil with plastics film; (4) manufacturing laminated aluminum and other converted metal foils from purchased foils; and (5) surface coating paper or paperboard.
31-33	Manufacturing	322230	Stationery Product Manufacturing	This industry comprises establishments primarily engaged in converting paper or paperboard into products used for writing, filing, art work, and similar applications.Illustrative Examples:Computer paper, die-cut, made from purchased paperDie-cut paper products for office use made from purchased paper or paperboardEnvelopes (i.e., mailing, stationery) made from any materialStationery made from purchased paperTablets (e.g., memo, note, writing) made from purchased paperTapes (e.g., adding machine, calculator, cash register) made from purchased paper
31-33	Manufacturing	322291	Sanitary Paper Product Manufacturing	This U.S. industry comprises establishments primarily engaged in converting purchased sanitary paper stock or wadding into sanitary paper products, such as facial tissues, handkerchiefs, table napkins, toilet paper, towels, disposable diapers, sanitary napkins, and tampons.
31-33	Manufacturing	322299	All Other Converted Paper Product Manufacturing	This U.S. industry comprises establishments primarily engaged in converting paper or paperboard into products (except containers, bags, coated and treated paper, stationery products, and sanitary paper products) or converting pulp into pulp products, such as egg cartons, food trays, and other food containers from molded pulp.Illustrative Examples:Crepe paper made from purchased paperDie-cut paper products (except for office use) made from purchased paper or paperboardMolded pulp products (e.g., egg cartons, food containers, food trays) manufacturingPaper novelties made from purchased paper

Wood Products

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Sector Code	Sector Description	National Industry Code	National Industry Title	National Industry Description
31-33	Manufacturing	333243	Sawmill, Woodworking, and Paper Machinery Manufacturing	This U.S. industry comprises establishments primarily engaged in (1) manufacturing sawmill and woodworking machinery (except handheld), such as circular and band sawing equipment, planing machinery, and sanding machinery, and/or (2) manufacturing paper industry machinery for making paper and paper products, such as pulp making machinery, paper and paperboard making machinery, and paper and paperboard converting machinery.
31-33	Manufacturing	337110	Wood Kitchen Cabinet and Countertop Manufacturing	This industry comprises establishments primarily engaged in manufacturing wood or plastics laminated on wood kitchen cabinets, bathroom vanities, and countertops (except freestanding). The cabinets and counters may be made on a stock or custom basis.
31-33	Manufacturing	337122	Nonupholstered Wood Household Furniture Manufacturing	This U.S. industry comprises establishments primarily engaged in manufacturing nonupholstered wood household-type furniture and freestanding cabinets (except television, stereo, and sewing machine cabinets). The furniture may be made on a stock or custom basis and may be assembled or unassembled (i.e., knockdown).
31-33	Manufacturing	337211	Wood Office Furniture Manufacturing	This U.S. industry comprises establishments primarily engaged in manufacturing wood office-type furniture. The furniture may be made on a stock or custom basis and may be assembled or unassembled (i.e., knockdown).
31-33	Manufacturing	337212	Custom Architectural Woodwork and Millwork Manufacturing	This U.S. industry comprises establishments primarily engaged in manufacturing custom designed interiors consisting of architectural woodwork and fixtures utilizing wood, wood products, and plastics laminates. All of the industry output is made to individual order on a job shop basis and requires skilled craftsmen as a labor input. A job might include custom manufacturing of display fixtures, gondolas, wall shelving units, entrance and window architectural detail, sales and reception counters, wall paneling, and matching furniture.
31-33	Manufacturing	337215	Showcase, Partition, Shelving, and Locker Manufacturing	This U.S. industry comprises establishments primarily engaged in manufacturing wood and nonwood office and store fixtures, shelving, lockers, frames, partitions, and related fabricated products of wood and nonwood materials, including plastics laminated fixture tops. The products are made on a stock or custom basis and may be assembled or unassembled (i.e., knockdown). Establishments exclusively making furniture parts (e.g., frames) are included in this industry.

Recreational Goods

Recreation is a major attractor of visitors and residents in Whatcom County. The recreational goods manufacturing industry focuses on designing, producing, and distributing clothing, equipment, and accessories tailored for outdoor activities, sports, and recreational pursuits. This includes items such as hiking boots, outdoor jackets, athletic wear, camping gear, backpacks, tents, sleeping bags, and specialized equipment for activities like cycling, skiing, climbing, and water sports. The reacreatiional goods manufacturing sector consists of the following industries.

Sector Code	Sector Description	National Industry Code	National Industry Title	National Industry Description
31-33	Manufacturing	314910	Textile Bag and Canvas Mills	This industry comprises establishments primarily engaged in manufacturing textile bags (except luggage) or other canvas and canvas-like products, such as awnings, sails, tarpaulins, and tents from purchased textile fabrics or yarns.Illustrative Examples:Covers (e.g., boat, swimming pool, truck) made from purchased fabricsLaundry bags made from purchased woven or knitted materialsSeed bags made from purchased woven or knitted materialsTextile bags made from purchased woven or knitted materials
31-33	Manufacturing	316110	Leather and Hide Tanning and Finishing	This industry comprises establishments primarily engaged in one or more of the following: (1) tanning, currying, and finishing hides and skins; (2) having others process hides and skins on a contract basis; and (3) dyeing or dressing furs.
31-33	Manufacturing	316210	Footwear Manufacturing	This industry comprises establishments primarily engaged in manufacturing footwear (except orthopedic extension footwear).Illustrative Examples:Athletic shoes manufacturingBallet slippers manufacturingCleated athletic shoes manufacturingShoes, children's and infants' (except orthopedic extension), manufacturingShoes, men's (except orthopedic extension), manufacturingShoes, women's (except orthopedic extension), manufacturing
31-33	Manufacturing	316990	Other Leather and Allied Product Manufacturing	This industry comprises establishments primarily engaged in manufacturing leather products (except footwear and apparel) from purchased leather or leather substitutes (e.g., fabric, plastics).Illustrative Examples: Billfolds, all materials, manufacturing, Boot and shoe cut stock and findings, leather, manufacturing, Dog furnishings (e.g., collars, harnesses, leashes, muzzles), manufacturing, Luggage, all materials, manufacturingShoe soles, leather, manufacturing, Purses, women's, all materials (except metal), manufacturingToilet kits and cases (except metal) manufacturing, Watch bands (except metal) manufacturing, Welders' jackets, leggings, and sleeves, leather, manufacturing
31-33	Manufacturing	336991	Motorcycle, Bicycle, and Parts Manufacturing	This U.S. industry comprises establishments primarily engaged in manufacturing motorcycles, bicycles, tricycles and similar equipment, and parts.
31-33	Manufacturing	339920	Sporting and Athletic Goods Manufacturing	This industry comprises establishments primarily engaged in manufacturing sporting and athletic goods (except apparel and footwear).

Supportive Manufacturing

The supportive manufacturing cluster involves the creation and manufacturing of custom components and parts used across various sectors, including automotive, aerospace, construction, electronics, industrial machinery, among others. Parts fabrication companies work with a wide range of materials, including metals, plastics, composites, and ceramics, depending on the application and performance needs of the end product. The industry is vital to supply chains, enabling the production of everything from consumer goods to advanced technologies. The supportive manufacturing sector consists of the following industries.

Sector Code	Sector Description	National Industry Code	National Industry Title	National Industry Description
23	Construction	237990	Other Heavy and Civil Engineering Construction	This industry comprises establishments primarily engaged in heavy and civil engineering construction projects (excluding highway, street, bridge, and distribution line construction). The work performed may include new work, reconstruction, rehabilitation, and repairs. Specialty trade contractors are included in this industry if they are engaged in activities primarily related to heavy and civil engineering construction projects (excluding highway, street, bridge, distribution line, oil and gas structure, and utilities building and structure construction). Construction projects involving water resources (e.g., dredging and land drainage), development of marine facilities, and projects involving open space improvement (e.g., parks and trails) are included in this industry.Illustrative Examples:Channel constructionLand drainage contractorsDam constructionMarine constructionDock constructionMicrotunneling contractorsDredging (e.g., canal, channel, ditch, waterway)Nuclear waste disposal site constructionEarth retention system constructionFlood control project constructionPark ground and recreational open space improvement constructionRailroad constructionGolf course constructionSubway constructionHorizontal drilling (e.g., cable, pipeline, sewer installation)Trenching, underwaterHydroelectric generating station constructionTunnel construction
54	Professional, Scientific, and Technical Serv	541330	Engineering Services	This industry comprises establishments primarily engaged in applying physical laws and principles of engineering in the design, development, and utilization of machines, materials, instruments, structures, processes, and systems. The assignments undertaken by these establishments may involve any of the following activities: provision of advice, preparation of feasibility studies, preparation of preliminary and final plans and designs, provision of technical services during the construction or installation phase, inspection and evaluation of engineering projects, and related services.Illustrative Examples:Civil engineering servicesEnvironmental engineering servicesConstruction engineering servicesMechanical engineering servicesEngineers' officesRobotics automation engineering services
31-33	Manufacturing	332613	Spring Manufacturing	This U.S. industry comprises establishments primarily engaged in manufacturing springs from purchased wire, strip, or rod.
31-33	Manufacturing	332618	Other Fabricated Wire Product Manufacturing	This U.S. industry comprises establishments primarily engaged in manufacturing fabricated wire products (except springs) made from purchased wire.Illustrative Examples:Barbed wire made from purchased wireChain link fencing and fence gates made from purchased wireMetal baskets made from purchased wirePaper clips made from purchased wireNails, brads, and staples made from purchased wireNoninsulated wire cable made from purchased wireWoven wire cloth made from purchased wire
31-33	Manufacturing	332710	Machine Shops	This industry comprises establishments known as machine shops primarily engaged in machining metal and plastic parts and parts of other composite materials on a job or order basis. Generally machine shop jobs are low volume using machine tools, such as lathes (including computer numerically controlled); automatic screw machines; and machines for boring, grinding, milling, and additive manufacturing.
31-33	Manufacturing	332721	Precision Turned Product Manufacturing	This U.S. industry comprises establishments known as precision turned manufacturers primarily engaged in machining precision products of all materials on a job or order basis. Generally precision turned product jobs are large volume using machines, such as automatic screw machines, rotary transfer machines, computer numerically controlled (CNC) lathes, or turning centers.
31-33	Manufacturing	332811	Metal Heat Treating	This U.S. industry comprises establishments primarily engaged in heat treating, such as annealing, tempering, and brazing, and cryogenically treating metals and metal products for the trade.
31-33	Manufacturing	332813	Electroplating, Plating, Polishing, Anodizing, and Coloring	This U.S. industry comprises establishments primarily engaged in electroplating, plating, anodizing, coloring, buffing, polishing, cleaning, and sandblasting metals and metal products for the trade. Included in this industry are establishments that perform these processes on other materials, such as plastics, in addition to metals.
31-33	Manufacturing	332911	Industrial Valve Manufacturing	This U.S. industry comprises establishments primarily engaged in manufacturing industrial valves and valves for water works and municipal water systems.Illustrative Examples:Complete fire hydrants manufacturingIndustrial-type ball valves manufacturingIndustrial-type butterfly valves manufacturingIndustrial-type check valves manufacturingIndustrial-type gate valves manufacturingIndustrial-type globe valves manufacturingIndustrial-type plug valves manufacturingIndustrial-type solenoid valves (except fluid power) manufacturingIndustrial-type steam traps manufacturingValves for nuclear applications manufacturing
31-33	Manufacturing	332912	Fluid Power Valve and Hose Fitting Manufacturing	This U.S. industry comprises establishments primarily engaged in manufacturing fluid power valves and hose fittings.Illustrative Examples:Fluid power aircraft subassemblies manufacturingHose assemblies for fluid power systems manufacturingHydraulic and pneumatic hose and tube fittings manufacturingHydraulic and pneumatic valves manufacturing
31-33	Manufacturing	332913	Plumbing Fixture Fitting and Trim Manufacturing	This U.S. industry comprises establishments primarily engaged in manufacturing plumbing fixture fittings and trim of all materials, such as faucets, flush valves, and shower heads.

Supportive Manufacturing

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Sector Code	Sector Description	National Industry Code	National Industry Title	National Industry Description
31-33	Manufacturing	332919	Other Metal Valve and Pipe Fitting Manufacturing	This U.S. industry comprises establishments primarily engaged in manufacturing metal valves (except industrial valves, fluid power valves, fluid power hose fittings, and plumbing fixture fittings and trim).Illustrative Examples:Aerosol valves manufacturingFirefighting nozzles manufacturingLawn hose nozzles manufacturingLawn sprinklers manufacturingWater traps manufacturingMetal hose couplings (except fluid power) manufacturingMetal pipe flanges and flange unions manufacturingPlumbing and heating inline valves (e.g., check, cutoff, stop) manufacturing
31-33	Manufacturing	332991	Ball and Roller Bearing Manufacturing	This U.S. industry comprises establishments primarily engaged in manufacturing ball and roller bearings of all materials.
31-33	Manufacturing	332996	Fabricated Pipe and Pipe Fitting Manufacturing	This U.S. industry comprises establishments primarily engaged in fabricating, such as cutting, threading, and bending, metal pipes and pipe fittings made from purchased metal pipe.
31-33	Manufacturing	332999	All Other Miscellaneous Fabricated Metal Product Manufacturing	This U.S. industry comprises establishments primarily engaged in manufacturing fabricated metal products (except forgings and stampings, cutlery and handtools, architectural and structural metals, boilers, tanks, shipping containers, hardware, spring and wire products, machine shop products, turned products, screws, nuts and bolts, metal valves, ball and roller bearings, ammunition, small arms and other ordnances and accessories, and fabricated pipes and pipe fittings).Illustrative Examples:Foil containers (except bags) manufacturingIndustrial pattern manufacturingMetal hair curlers manufacturingMetal ironing boards manufacturingMetal pallets manufacturingMetal pipe hangers and supports manufacturingMetal safes manufacturingMetal vaults (except burial) manufacturingPermanent metallic magnets manufacturingPortable metal ladders manufacturingSanitary ware (e.g., bathtubs, lavatories, sinks), metal and enameled metal, manufacturingSteel wool manufacturing
31-33	Manufacturing	333248	All Other Industrial Machinery Manufacturing	This U.S. industry comprises establishments primarily engaged in manufacturing industrial machinery (except agricultural and farm-type; construction and mining machinery; food manufacturing-type machinery; semiconductor making machinery; and sawmill, woodworking, and paper making machinery).Illustrative Examples:Additive manufacturing machinery manufacturingBookbinding machines manufacturingChemical processing machinery and equipment manufacturingCigarette making machinery manufacturingGlass making machinery (e.g., blowing, forming, molding) manufacturingPetroleum refining machinery manufacturingPlastics working machinery manufacturingPrinting presses manufacturingRubber working machinery manufacturingSewing machines (including household-type) manufacturingShoe making and repairing machinery manufacturingTannery machinery manufacturing Textile making machinery manufacturing
31-33	Manufacturing	333514	Special Die and Tool, Die Set, Jig, and Fixture Manufacturing	This U.S. industry comprises establishments, known as tool and die shops, primarily engaged in manufacturing special tools and fixtures, such as cutting dies and jigs.
31-33	Manufacturing	333515	Cutting Tool and Machine Tool Accessory Manufacturing	This U.S. industry comprises establishments primarily engaged in manufacturing accessories and attachments for metal cutting and metal forming machine tools.Illustrative Examples:Knives and bits for metalworking lathes, planers, and shapers manufacturingMeasuring attachments (e.g., sine bars) for machine tool manufacturingMetalworking drill bits manufacturingTaps and dies (i.e., machine tool accessories) manufacturing
31-33	Manufacturing	333517	Machine Tool Manufacturing	This U.S. industry comprises establishments primarily engaged in (1) manufacturing metal cutting machine tools (except handtools) and/or (2) manufacturing metal forming machine tools (except handtools), such as punching, sheering, bending, forming, pressing, forging and die-casting machines.Illustrative Examples:Bending and forming machines, metalworking, manufacturingBuffing and polishing machines, metalworking, manufacturingDrilling machines, metalworking, manufacturingGrinding machines, metalworking, manufacturingHome workshop metal cutting machine tools (except handtools, welding equipment) manufacturingMetalworking lathes manufacturingMilling machines, metalworking, manufacturingStamping machines, metalworking, manufacturing
31-33	Manufacturing	333519	Rolling Mill and Other Metalworking Machinery Manufacturing	This U.S. industry comprises establishments primarily engaged in manufacturing rolling mill machinery and equipment and/or other metalworking machinery (except industrial molds; special dies and tools, die sets, jigs, and fixtures; cutting tools and machine tool accessories; and machine tools).Illustrative Examples:Assembly machines (i.e., wire making equipment) manufacturingCradle assembly machinery (i.e., wire making equipment) manufacturingMetalworking coil winding and cutting machinery manufacturingRolling mill roll machines, metalworking, manufacturingWire drawing and fabricating machinery and equipment (except dies) manufacturing
31-33	Manufacturing	333912	Air and Gas Compressor Manufacturing	This U.S. industry comprises establishments primarily engaged in manufacturing general purpose air and gas compressors, such as reciprocating compressors, centrifugal compressors, vacuum pumps (except laboratory), and nonagricultural spraying and dusting compressors and spray gun units.

Food Products

Food product manufacturing involves enhancing raw agricultural or food materials by transforming them into higher-value products through processing, packaging, or specialized preparation. This industry adds economic worth by improving the quality, convenience, or desirability of food items, catering to consumer preferences and market demands. Examples of value-added food products include ready-to-eat meals, organic or specialty foods, gourmet snacks, frozen or canned goods, and fortified or functional foods (such as those with added nutrients). The industry often incorporates innovative techniques like preserving, fermenting, freezing, or incorporating unique ingredients to create products with extended shelf life, improved taste, or specific health benefits. The Whatcom County food products sector currently supports activities from extraction to processing, and production. The food product sector consists of the following industries.

Sector Code	Sector Description	National Industry Code	National Industry Title	National Industry Description
11	Agriculture, Forestry, Fishing and Hunting	111110	Soybean Farming	This industry comprises establishments primarily engaged in growing soybeans and/or producing soybean seeds.
11	Agriculture, Forestry, Fishing and Hunting	111120	Oilseed (except Soybean) Farming	This industry comprises establishments primarily engaged in growing fibrous oilseed producing plants and/or producing oilseed seeds, such as sunflower, safflower, flax, rape, canola, and sesame.
11	Agriculture, Forestry, Fishing and Hunting	111130	Dry Pea and Bean Farming	This industry comprises establishments primarily engaged in growing dry peas, beans, and/or lentils.
11	Agriculture, Forestry, Fishing and Hunting	111140	Wheat Farming	This industry comprises establishments primarily engaged in growing wheat and/or producing wheat seeds.
11	Agriculture, Forestry, Fishing and Hunting	111150	Corn Farming	This industry comprises establishments primarily engaged in growing corn (except sweet corn) and/or producing corn seeds.
11	Agriculture, Forestry, Fishing and Hunting	111160	Rice Farming	This industry comprises establishments primarily engaged in growing rice (except wild rice) and/or producing rice seeds.
11	Agriculture, Forestry, Fishing and Hunting	111191	Oilseed and Grain Combination Farming	This U.S. industry comprises establishments engaged in growing a combination of oilseed(s) and grain(s) with no one oilseed (or family of oilseeds) or grain (or family of grains) accounting for one-half of the establishment's agricultural production (value of crops for market). These establishments may produce oilseed(s) and grain(s) seeds and/or grow oilseed(s) and grain(s).
11	Agriculture, Forestry, Fishing and Hunting	111199	All Other Grain Farming	This U.S. industry comprises establishments primarily engaged in growing grains and/or producing grain(s) seeds (except wheat, corn, rice, and oilseed(s) and grain(s) combinations).Illustrative Examples:Barley farmingSorghum farmingOat farmingWild rice farmingRye farming
11	Agriculture, Forestry, Fishing and Hunting	111211	Potato Farming	This U.S. industry comprises establishments primarily engaged in growing potatoes and/or producing seed potatoes.
11	Agriculture, Forestry, Fishing and Hunting	111219	Other Vegetable (except Potato) and Melon Farming	This U.S. industry comprises establishments primarily engaged in one or more of the following: (1) growing melons and/or vegetables (except potatoes; dry peas; dry beans; field, silage, or seed corn; and sugar beets); (2) producing vegetable and/or melon seeds; and (3) growing vegetable and/or melon bedding plants.Illustrative Examples:Carrot farmingSquash farmingGreen bean farmingTomato farmingWatermelon farming Melon farming (e.g., cantaloupe, casaba, honeydew, watermelon)Vegetable (except potato) farmingPepper farming (e.g., bell, chili, green, red, sweet peppers)
11	Agriculture, Forestry, Fishing and Hunting	111310	Orange Groves	This industry comprises establishments primarily engaged in growing oranges.
11	Agriculture, Forestry, Fishing and Hunting	111320	Citrus (except Orange) Groves	This industry comprises establishments primarily engaged in growing citrus fruits (except oranges).Illustrative Examples:Citrus groves (except oranges)Mandarin grovesGrapefruit grovesTangelo grovesLemon grovesTangerine groves
11	Agriculture, Forestry, Fishing and Hunting	111331	Apple Orchards	This U.S. industry comprises establishments primarily engaged in growing apples.
11	Agriculture, Forestry, Fishing and Hunting	111332	Grape Vineyards	This U.S. industry comprises establishments primarily engaged in growing grapes and/or growing grapes to sun dry into raisins.
11	Agriculture, Forestry, Fishing and Hunting	111333	Strawberry Farming	This U.S. industry comprises establishments primarily engaged in growing strawberries.
11	Agriculture, Forestry, Fishing and Hunting	111334	Berry (except Strawberry) Farming	This U.S. industry comprises establishments primarily engaged in growing berries.Illustrative Examples:Berry (except strawberries) farmingCranberry farmingBlackberry farmingCurrant farmingBlueberry farmingRaspberry farming
11	Agriculture, Forestry, Fishing and Hunting	111335	Tree Nut Farming	This U.S. industry comprises establishments primarily engaged in growing tree nuts.Illustrative Examples:Almond farmingPistachio farmingFilbert farmingTree nut farmingMacadamia farmingWalnut farmingPecan farming
11	Agriculture, Forestry, Fishing and Hunting	111336	Fruit and Tree Nut Combination Farming	This U.S. industry comprises establishments primarily engaged in growing a combination of fruit(s) and tree nut(s) with no one fruit (or family of fruit) or family of tree nuts accounting for one-half of the establishment's agricultural production (i.e., value of crops for market).
11	Agriculture, Forestry, Fishing and Hunting	111339	Other Noncitrus Fruit Farming	This U.S. industry comprises establishments primarily engaged in growing noncitrus fruits (except apples, grapes, berries, and fruit(s) and tree nut(s) combinations).Illustrative Examples:Apricot farmingFig farmingBanana farmingNoncitrus fruit farmingCherry farmingPeach farmingCoffee farmingPineapple farmingDate farmingPrune farming
11	Agriculture, Forestry, Fishing and Hunting	111411	Mushroom Production	This U.S. industry comprises establishments primarily engaged in growing mushrooms under cover in mines underground, or in other controlled environments.
11	Agriculture, Forestry, Fishing and Hunting	111419	Other Food Crops Grown Under Cover	This U.S. industry comprises establishments primarily engaged in growing food crops (except mushrooms) under glass or protective cover.Illustrative Examples:Alfalfa sprout farming, grown under coverMelon farming, grown under coverVegetable farming, grown under coverHydroponic crop farmingFruit farming, grown under cover
11	Agriculture, Forestry, Fishing and Hunting	111421	Nursery and Tree Production	This U.S. industry comprises establishments primarily engaged in (1) growing nursery products, nursery stock, shrubbery, bulbs, fruit stock, sod, and so forth, under cover or in open fields and/or (2) growing short rotation woody trees with a growth and harvest cycle of 10 years or less for pulp or tree stock.
11	Agriculture, Forestry, Fishing and Hunting	111422	Floriculture Production	This U.S. industry comprises establishments primarily engaged in growing and/or producing floriculture products (e.g., cut flowers and roses, cut cultivated greens, potted flowering and foliage plants, and flower seeds) under cover and in open fields.

Food Products

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Sector Code	Sector Description	National Industry Code	National Industry Title	National Industry Description
11	Agriculture, Forestry, Fishing and Hunting	111910	Tobacco Farming	This industry comprises establishments primarily engaged in growing tobacco.
11	Agriculture, Forestry, Fishing and Hunting	111920	Cotton Farming	This industry comprises establishments primarily engaged in growing cotton.
11	Agriculture, Forestry, Fishing and Hunting	111930	Sugarcane Farming	This industry comprises establishments primarily engaged in growing sugarcane.
11	Agriculture, Forestry, Fishing and Hunting	111940	Hay Farming	This industry comprises establishments primarily engaged in growing hay, alfalfa, clover, and/or mixed hay.
11	Agriculture, Forestry, Fishing and Hunting	111991	Sugar Beet Farming	This U.S. industry comprises establishments primarily engaged in growing sugar beets.
11	Agriculture, Forestry, Fishing and Hunting	111992	Peanut Farming	This U.S. industry comprises establishments primarily engaged in growing peanuts.
11	Agriculture, Forestry, Fishing and Hunting	111998	All Other Miscellaneous Crop Farming	This U.S. industry comprises establishments primarily engaged in one of the following: (1) growing crops (except oilseeds and/or grains; vegetables and/or melons; fruits and/or tree nuts; greenhouse, nursery, and/or floriculture products; tobacco; cotton; sugarcane; hay; sugar beets; or peanuts); (2) growing a combination of crops (except a combination of oilseed(s) and grain(s); and a combination of fruit(s) and tree nut(s)) with no one crop or family of crops accounting for one-half of the establishment's agricultural production (i.e., value of crops for market); or (3) gathering tea or maple sap.Illustrative Examples:Agave farmingMint farmingGeneral combination crop farming (except oilseed and grain; vegetables and melons; fruit and tree nut combinations)Hay seed farmingGrass seed farmingHop farmingSpice farming
11	Agriculture, Forestry, Fishing and Hunting	112111	Beef Cattle Ranching and Farming	This U.S. industry comprises establishments primarily engaged in raising cattle (including cattle for dairy herd replacements).
11	Agriculture, Forestry, Fishing and Hunting	112112	Cattle Feedlots	This U.S. industry comprises establishments primarily engaged in feeding cattle for fattening.
11	Agriculture, Forestry, Fishing and Hunting	112120	Dairy Cattle and Milk Production	This industry comprises establishments primarily engaged in milking dairy cattle.
11	Agriculture, Forestry, Fishing and Hunting	112130	Dual-Purpose Cattle Ranching and Farming	This industry comprises establishments primarily engaged in raising cattle for both milking and meat production.
11	Agriculture, Forestry, Fishing and Hunting	112210	Hog and Pig Farming	This industry comprises establishments primarily engaged in raising hogs and pigs. These establishments may include farming activities, such as breeding, farrowing, and the raising of weanling pigs, feeder pigs, or market size hogs.
11	Agriculture, Forestry, Fishing and Hunting	112310	Chicken Egg Production	This industry comprises establishments primarily engaged in raising chickens for egg production. The eggs produced may be for use as table eggs or hatching eggs.
11	Agriculture, Forestry, Fishing and Hunting	112320	Broilers and Other Meat Type Chicken Production	This industry comprises establishments primarily engaged in raising broilers, fryers, roasters, and other meat type chickens.
11	Agriculture, Forestry, Fishing and Hunting	112330	Turkey Production	This industry comprises establishments primarily engaged in raising turkeys for meat or egg production.
11	Agriculture, Forestry, Fishing and Hunting	112340	Poultry Hatcheries	This industry comprises establishments primarily engaged in hatching poultry of any kind.
11	Agriculture, Forestry, Fishing and Hunting	112390	Other Poultry Production	This industry comprises establishments primarily engaged in raising poultry (except chickens for meat or egg production and turkeys).Illustrative Examples:Duck productionOstrich productionEmu productionPheasant productionGeese productionQuail production
11	Agriculture, Forestry, Fishing and Hunting	112410	Sheep Farming	This industry comprises establishments primarily engaged in raising sheep and lambs, or feeding lambs for fattening. The sheep or lambs may be raised for sale or wool production.
11	Agriculture, Forestry, Fishing and Hunting	112420	Goat Farming	This industry comprises establishments primarily engaged in raising goats.
11	Agriculture, Forestry, Fishing and Hunting	112511	Finfish Farming and Fish Hatcheries	This U.S. industry comprises establishments primarily engaged in (1) farm raising finfish (e.g., catfish, trout, goldfish, tropical fish, minnows) and/or (2) hatching fish of any kind.
11	Agriculture, Forestry, Fishing and Hunting	112512	Shellfish Farming	This U.S. industry comprises establishments primarily engaged in farm raising shellfish (e.g., crayfish, shrimp, oysters, clams, mollusks).
11	Agriculture, Forestry, Fishing and Hunting	112519	Other Aquaculture	This U.S. industry comprises establishments primarily engaged in (1) farm raising of aquatic animals (except finfish and shellfish) and/or (2) farm raising of aquatic plants. Alligator, algae, frog, seaweed, or turtle production is included in this industry.
11	Agriculture, Forestry, Fishing and Hunting	112910	Apiculture	This industry comprises establishments primarily engaged in raising bees. These establishments may collect and gather honey; and/or sell queen bees, packages of bees, royal jelly, bees' wax, propolis, venom, pollen, and/or other bee products.
11	Agriculture, Forestry, Fishing and Hunting	112920	Horses and Other Equine Production	This industry comprises establishments primarily engaged in raising horses, mules, donkeys, and other equines.
11	Agriculture, Forestry, Fishing and Hunting	112930	Fur-Bearing Animal and Rabbit Production	This industry comprises establishments primarily engaged in raising fur-bearing animals including rabbits. These animals may be raised for sale or for their pelt production.

Food Products

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Sector Code	Sector Description	National Industry Code	National Industry Title	National Industry Description
11	Agriculture, Forestry, Fishing and Hunting	112990	All Other Animal Production	This industry comprises establishments primarily engaged in (1) raising animals (except cattle, hogs and pigs, poultry, sheep and goats, aquaculture, apiculture, horses and other equines; and fur-bearing animals including rabbits) or (2) raising a combination of animals, with no one animal or family of animals accounting for one-half of the establishment's agricultural production (i.e., value of animals for market).Illustrative Examples:Bird production (e.g., canaries, parakeets, parrots)Laboratory animal production (e.g., rats, mice, guinea pigs)Deer productionCombination animal farming (except dairy, poultry)Companion animals production (e.g., cats, dogs)Worm productionLlama production
11	Agriculture, Forestry, Fishing and Hunting	114111	Finfish Fishing	This U.S. industry comprises establishments primarily engaged in the commercial catching or taking of finfish (e.g., bluefish, salmon, trout, tuna) from their natural habitat.
11	Agriculture, Forestry, Fishing and Hunting	114112	Shellfish Fishing	This U.S. industry comprises establishments primarily engaged in the commercial catching or taking of shellfish (e.g., clams, crabs, lobsters, mussels, oysters, sea urchins, shrimp) from their natural habitat.
11	Agriculture, Forestry, Fishing and Hunting	114119	Other Marine Fishing	This U.S. industry comprises establishments primarily engaged in the commercial catching or taking of marine animals (except finfish and shellfish).
42	Wholesale Trade	424440	Poultry and Poultry Product Merchant Wholesalers	This industry comprises establishments primarily engaged in the merchant wholesale distribution of poultry and/or poultry products (except canned and packaged frozen).
42	Wholesale Trade	424460	Fish and Seafood Merchant Wholesalers	This industry comprises establishments primarily engaged in the merchant wholesale distribution of fish and seafood (except canned or packaged frozen).
42	Wholesale Trade	424470	Meat and Meat Product Merchant Wholesalers	This industry comprises establishments primarily engaged in the merchant wholesale distribution of meats and meat products (except canned and packaged frozen) and/or lard.
42	Wholesale Trade	424480	Fresh Fruit and Vegetable Merchant Wholesalers	This industry comprises establishments primarily engaged in the merchant wholesale distribution of fresh fruits and vegetables.
42	Wholesale Trade	424510	Grain and Field Bean Merchant Wholesalers	This industry comprises establishments primarily engaged in the merchant wholesale distribution of grains, such as corn, wheat, oats, barley, and unpolished rice; dry beans; and soybeans and other inedible beans. Included in this industry are establishments primarily engaged in operating country or terminal grain elevators primarily for the purpose of wholesaling.
42	Wholesale Trade	424520	Livestock Merchant Wholesalers	This industry comprises establishments primarily engaged in the merchant wholesale distribution of livestock (except horses and mules).Illustrative Examples:Cattle merchant wholesalersHogs merchant wholesalersGoats merchant wholesalersSheep merchant wholesalers
42	Wholesale Trade	424820	Wine and Distilled Alcoholic Beverage Merchant Wholesalers	This industry comprises establishments primarily engaged in the merchant wholesale distribution of wine, distilled alcoholic beverages, and/or neutral spirits and ethyl alcohol used in blended wines and distilled liquors.
31-33	Manufacturing	311111	Dog and Cat Food Manufacturing	This U.S. industry comprises establishments primarily engaged in manufacturing dog and cat food from ingredients, such as grains, oilseed mill products, and meat products.
31-33	Manufacturing	311119	Other Animal Food Manufacturing	This U.S. industry comprises establishments primarily engaged in manufacturing animal food (except dog and cat) from ingredients, such as grains, oilseed mill products, and meat products.
31-33	Manufacturing	311211	Flour Milling	This U.S. industry comprises establishments primarily engaged in (1) milling flour or meal from grains (except rice) or vegetables and/or (2) milling flour and preparing flour mixes or doughs.
31-33	Manufacturing	311212	Rice Milling	This U.S. industry comprises establishments primarily engaged in one of the following: (1) milling rice; (2) cleaning and polishing rice; or (3) milling, cleaning, and polishing rice. The establishments in this industry may package the rice they mill with other ingredients.
31-33	Manufacturing	311213	Malt Manufacturing	This U.S. industry comprises establishments primarily engaged in manufacturing malt from barley, rye, or other grains.
31-33	Manufacturing	311221	Wet Corn Milling and Starch Manufacturing	This U.S. industry comprises establishments primarily engaged in wet milling corn and other vegetables (except to make ethyl alcohol). Examples of products made in these establishments are corn sweeteners, such as glucose, dextrose, and fructose; corn oil; and starches (except laundry).
31-33	Manufacturing	311224	Soybean and Other Oilseed Processing	This U.S. industry comprises establishments primarily engaged in crushing oilseeds and tree nuts, such as soybeans, cottonseeds, linseeds, peanuts, and sunflower seeds. Examples of products produced in these establishments are oilseed oils, cakes, meals, and protein isolates and concentrates.

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Sector Code	Sector Description	National Industry Code	National Industry Title	National Industry Description
31-33	Manufacturing	311225	Fats and Oils Refining and Blending	This U.S. industry comprises establishments primarily engaged in one or more of the following: (1) manufacturing shortening and margarine from purchased fats and oils; (2) refining and/or blending vegetable, oilseed, and tree nut oils from purchased oils; and (3) blending purchased animal fats with purchased vegetable fats.
31-33	Manufacturing	311230	Breakfast Cereal Manufacturing	This industry comprises establishments primarily engaged in manufacturing breakfast cereal foods.
31-33	Manufacturing	311313	Beet Sugar Manufacturing	This U.S. industry comprises establishments primarily engaged in manufacturing refined beet sugar from sugar beets.
31-33	Manufacturing	311314	Cane Sugar Manufacturing	This U.S. industry comprises establishments primarily engaged in (1) processing sugarcane and/or (2) refining cane sugar from raw cane sugar.
31-33	Manufacturing	311340	Nonchocolate Confectionery Manufacturing	This industry comprises establishments primarily engaged in manufacturing nonchocolate confectioneries. Included in this industry are establishments primarily engaged in retailing nonchocolate confectionery products not for immediate consumption made on the premises.
31-33	Manufacturing	311351	Chocolate and Confectionery Manufacturing from Cacao Beans	This U.S. industry comprises establishments primarily engaged in shelling, roasting, and grinding cacao beans and making chocolate cacao products and chocolate confectioneries.
31-33	Manufacturing	311352	Confectionery Manufacturing from Purchased Chocolate	This U.S. industry comprises establishments primarily engaged in manufacturing chocolate confectioneries from chocolate produced elsewhere. Included in this industry are establishments primarily engaged in retailing chocolate confectionery products not for immediate consumption made on the premises from chocolate made elsewhere.
31-33	Manufacturing	311411	Frozen Fruit, Juice, and Vegetable Manufacturing	This U.S. industry comprises establishments primarily engaged in manufacturing frozen fruits; frozen vegetables; and frozen fruit juices, ades, drinks, cocktail mixes and concentrates.
31-33	Manufacturing	311412	Frozen Specialty Food Manufacturing	This U.S. industry comprises establishments primarily engaged in manufacturing frozen specialty foods (except seafood), such as frozen dinners, entrees, and side dishes; frozen pizza; frozen whipped topping; and frozen waffles, pancakes, and French toast.
31-33	Manufacturing	311421	Fruit and Vegetable Canning	This U.S. industry comprises establishments primarily engaged in manufacturing canned, pickled, and brined fruits and vegetables. Examples of products made in these establishments are canned juices; canned jams and jellies; canned tomato-based sauces, such as catsup, salsa, chili sauce, spaghetti sauce, barbeque sauce, and tomato paste; and pickles, relishes, and sauerkraut.
31-33	Manufacturing	311422	Specialty Canning	This U.S. industry comprises establishments primarily engaged in manufacturing canned specialty foods. Examples of products made in these establishments are canned baby food, canned baked beans, canned soups (except seafood), canned spaghetti, and other canned nationality foods.
31-33	Manufacturing	311423	Dried and Dehydrated Food Manufacturing	This U.S. industry comprises establishments primarily engaged in (1) drying (including freeze-dried) and/or dehydrating fruits, vegetables, and soup mixes and bouillon and/or (2) drying and/or dehydrating ingredients and packaging them with other purchased ingredients, such as rice and dry pasta.
31-33	Manufacturing	311511	Fluid Milk Manufacturing	This U.S. industry comprises establishments primarily engaged in (1) manufacturing processed milk products, such as pasteurized milk or cream and sour cream and/or (2) manufacturing fluid milk dairy substitutes from soybeans and other nondairy substances.
31-33	Manufacturing	311512	Creamery Butter Manufacturing	This U.S. industry comprises establishments primarily engaged in manufacturing creamery butter from milk and/or processed milk products.
31-33	Manufacturing	311513	Cheese Manufacturing	This U.S. industry comprises establishments primarily engaged in (1) manufacturing cheese products (except cottage cheese) from raw milk and/or processed milk products and/or (2) manufacturing cheese substitutes from soybean and other nondairy substances.
31-33	Manufacturing	311514	Dry, Condensed, and Evaporated Dairy Product Manufacturing	This U.S. industry comprises establishments primarily engaged in manufacturing dry, condensed, and evaporated milk and dairy substitute products.
31-33	Manufacturing	311520	Ice Cream and Frozen Dessert Manufacturing	This industry comprises establishments primarily engaged in manufacturing ice cream, frozen yogurts, frozen ices, sherbets, frozen tofu, and other frozen desserts (except bakery products).
31-33	Manufacturing	311611	Animal (except Poultry) Slaughtering	This U.S. industry comprises establishments primarily engaged in slaughtering animals (except poultry and small game). Establishments that slaughter and prepare meats are included in this industry.

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Sector Code	Sector Description	National Industry Code	National Industry Title	National Industry Description
31-33	Manufacturing	311612	Meat Processed from Carcasses	This U.S. industry comprises establishments primarily engaged in processing or preserving meat and meat byproducts (except poultry and small game) from purchased meats. This industry includes establishments primarily engaged in assembly cutting and packing of meats (i.e., boxed meats) from purchased meats.
31-33	Manufacturing	311613	Rendering and Meat Byproduct Processing	This U.S. industry comprises establishments primarily engaged in rendering animal fat, bones, and meat scraps.
31-33	Manufacturing	311615	Poultry Processing	This U.S. industry comprises establishments primarily engaged in (1) slaughtering poultry and small game and/or (2) preparing processed poultry and small game meat and meat byproducts.
31-33	Manufacturing	311710	Seafood Product Preparation and Packaging	This industry comprises establishments primarily engaged in one or more of the following: (1) canning seafood (including soup); (2) smoking, salting, and drying seafood; (3) eviscerating fresh fish by removing heads, fins, scales, bones, and entrails; (4) shucking and packing fresh shellfish; (5) processing marine fats and oils; and (6) freezing seafood. Establishments known as "floating factory ships" that are engaged in the gathering and processing of seafood into canned seafood products are included in this industry.
31-33	Manufacturing	311813	Frozen Cakes, Pies, and Other Pastries Manufacturing	This U.S. industry comprises establishments primarily engaged in manufacturing frozen bakery products (except bread), such as cakes, pies, and doughnuts.
31-33	Manufacturing	311821	Cookie and Cracker Manufacturing	This U.S. industry comprises establishments primarily engaged in manufacturing cookies, crackers, and other products, such as ice cream cones.
31-33	Manufacturing	311824	Dry Pasta, Dough, and Flour Mixes Manufacturing from Purchased Flour	This U.S. industry comprises establishments primarily engaged in (1) manufacturing dry pasta and/or (2) manufacturing prepared flour mixes or dough from flour ground elsewhere. The establishments in this industry may package the dry pasta they manufacture with other ingredients.
31-33	Manufacturing	311830	Tortilla Manufacturing	This industry comprises establishments primarily engaged in manufacturing tortillas.
31-33	Manufacturing	311911	Roasted Nuts and Peanut Butter Manufacturing	This U.S. industry comprises establishments primarily engaged in one or more of the following: (1) salting, roasting, drying, cooking, or canning nuts; (2) processing grains or seeds into snacks; and (3) manufacturing peanut butter and other nut butters.
31-33	Manufacturing	311919	Other Snack Food Manufacturing	This U.S. industry comprises establishments primarily engaged in manufacturing snack foods (except roasted nuts and peanut butter).Illustrative Examples:Corn chips and related corn snacks manufacturingPopped popcorn (except candy-covered) manufacturingPork rinds manufacturingPotato chips manufacturingPretzels (except soft) manufacturingTortilla chips manufacturing
31-33	Manufacturing	311920	Coffee and Tea Manufacturing	This industry comprises establishments primarily engaged in one or more of the following: (1) roasting coffee; (2) manufacturing coffee and tea concentrates (including instant and freeze-dried); (3) blending tea; (4) manufacturing herbal tea; and (5) manufacturing coffee extracts, flavorings, and syrups.
31-33	Manufacturing	311930	Flavoring Syrup and Concentrate Manufacturing	This industry comprises establishments primarily engaged in manufacturing flavoring syrup drink concentrates and related products for soda fountain use or for the manufacture of soft drinks.
31-33	Manufacturing	311941	Mayonnaise, Dressing, and Other Prepared Sauce Manufacturing	This U.S. industry comprises establishments primarily engaged in manufacturing mayonnaise, salad dressing, vinegar, mustard, horseradish, soy sauce, tartar sauce, Worcestershire sauce, and other prepared sauces (except tomato-based and gravy).
31-33	Manufacturing	311942	Spice and Extract Manufacturing	This U.S. industry comprises establishments primarily engaged in (1) manufacturing spices, table salt, seasonings, flavoring extracts (except coffee and meat), and natural food colorings and/or (2) manufacturing dry mix food preparations, such as salad dressing mixes, gravy and sauce mixes, frosting mixes, and other dry mix preparations.
31-33	Manufacturing	311991	Perishable Prepared Food Manufacturing	This U.S. industry comprises establishments primarily engaged in manufacturing perishable prepared foods, such as salads, sandwiches, prepared meals, fresh pizza, fresh pasta, and peeled or cut vegetables.

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Sector Code	Sector Description	National Industry Code	National Industry Title	National Industry Description
31-33	Manufacturing	311999	All Other Miscellaneous Food Manufacturing	This U.S. industry comprises establishments primarily engaged in manufacturing food (except animal food; grain and oilseed milling; sugar and confectionery products; preserved fruits, vegetables, and specialties; dairy products; meat products; seafood products; bakeries and tortillas; snack foods; coffee and tea; flavoring syrups and concentrates; seasonings and dressings; and perishable prepared food). Included in this industry are establishments primarily engaged in mixing purchased dried and/or dehydrated ingredients including those mixing purchased dried and/or dehydrated ingredients for soup mixes and bouillon.Illustrative Examples:Baking powder manufacturingCake frosting, prepared, manufacturingDessert puddings manufacturingSweetening syrups (except pure maple) manufacturingEgg substitutes manufacturingGelatin dessert preparations manufacturing Honey processingPowdered drink mixes (except chocolate, coffee, tea, or milk based) manufacturingPopcorn (except popped) manufacturingYeast manufacturing
31-33	Manufacturing	312111	Soft Drink Manufacturing	This U.S. industry comprises establishments primarily engaged in manufacturing soft drinks and artificially carbonated waters.
31-33	Manufacturing	312112	Bottled Water Manufacturing	This U.S. industry comprises establishments primarily engaged in purifying and bottling water (including naturally carbonated).
31-33	Manufacturing	312113	Ice Manufacturing	This U.S. industry comprises establishments primarily engaged in manufacturing ice.
31-33	Manufacturing	312120	Breweries	This industry comprises establishments primarily engaged in brewing beer, ale, lager, malt liquors, and nonalcoholic beer.
31-33	Manufacturing	312130	Wineries	This industry comprises establishments primarily engaged in one or more of the following: (1) growing grapes and manufacturing wines and brandies; (2) manufacturing wines and brandies from grapes and other fruits grown elsewhere; and (3) blending wines and brandies.
31-33	Manufacturing	312140	Distilleries	This industry comprises establishments primarily engaged in one or more of the following: (1) distilling potable liquors (except brandies); (2) distilling and blending liquors; and (3) blending and mixing liquors and other ingredients.
31-33	Manufacturing	327213	Glass Container Manufacturing	This U.S. industry comprises establishments primarily engaged in manufacturing glass packaging, bottling, and canning containers.
31-33	Manufacturing	333241	Food Product Machinery Manufacturing	This U.S. industry comprises establishments primarily engaged in manufacturing food and beverage manufacturing-type machinery and equipment, such as dairy product plant machinery and equipment (e.g., homogenizers, pasteurizers, ice cream freezers), bakery machinery and equipment (e.g., dough mixers, bake ovens, pastry rolling machines), meat and poultry processing and preparation machinery, and other commercial food products machinery (e.g., slicers, choppers, and mixers).
48-49	Transportation and Warehousing	493120	Refrigerated Warehousing and Storage	This industry comprises establishments primarily engaged in operating refrigerated warehousing and storage facilities. Establishments primarily engaged in the storage of furs for the trade are included in this industry. The services provided by these establishments include blast freezing, tempering, and modified atmosphere storage services.
48-49	Transportation and Warehousing	493130	Farm Product Warehousing and Storage	This industry comprises establishments primarily engaged in operating bulk farm product warehousing and storage facilities (except refrigerated). Grain elevators primarily engaged in storage are included in this industry.

Energy

The energy products manufacturing industry focuses on the design, production, and distribution of technologies and systems that generate, store, or utilize energy in more efficient ways. This industry includes a wide array of products, such as petroleum products, energy storage solutions like batteries, and renewable energy technologies such as solar panels and wind turbines. The energy sector consists of the following industries.

Sector Code	Sector Description	National Industry Code	National Industry Title	National Industry Description
21	Mining, Quarrying, and Oil and Gas Extraction	211120	Crude Petroleum Extraction	This industry comprises establishments primarily engaged in (1) the exploration, development, and/or the production of petroleum from wells in which the hydrocarbons will initially flow or can be produced using normal or enhanced drilling and extraction techniques or (2) the production of crude petroleum from surface shales or tar sands or from reservoirs in which the hydrocarbons are semisolids. Establishments in this industry operate oil wells on their own account or for others on a contract or fee basis.
21	Mining, Quarrying, and Oil and Gas Extraction	211130	Natural Gas Extraction	This industry comprises establishments primarily engaged in (1) the exploration, development, and/or the production of natural gas from wells in which the hydrocarbons will initially flow or can be produced using normal or enhanced drilling and extraction techniques or (2) the recovery of liquid hydrocarbons from oil and gas field gases. Establishments primarily engaged in sulfur recovery from natural gas are included in this industry.
21	Mining, Quarrying, and Oil and Gas Extraction	213111	Drilling Oil and Gas Wells	This U.S. industry comprises establishments primarily engaged in drilling oil and gas wells for others on a contract or fee basis. This industry includes contractors that specialize in spudding in, drilling in, redrilling, and directional drilling.
21	Mining, Quarrying, and Oil and Gas Extraction	213112	Support Activities for Oil and Gas Operations	This U.S. industry comprises establishments primarily engaged in performing support activities, on a contract or fee basis, for oil and gas operations (except geophysical surveying and mapping, site preparation, construction, and transportation activities). Services included are exploration; excavating slush pits and cellars, well surveying; running, cutting, and pulling casings, tubes, and rods; cementing wells, shooting wells; perforating well casings; acidizing and chemically treating wells; and cleaning out, bailing, and swabbing wells.
22	Utilities	221111	Hydroelectric Power Generation	This U.S. industry comprises establishments primarily engaged in operating hydroelectric power generation facilities. These facilities use water power to drive a turbine and produce electric energy. The electric energy produced in these establishments is provided to electric power transmission systems or to electric power distribution systems.
22	Utilities	221112	Fossil Fuel Electric Power Generation	This U.S. industry comprises establishments primarily engaged in operating fossil fuel powered electric power generation facilities. These facilities use fossil fuels, such as coal, oil, or gas, in internal combustion or combustion turbine conventional steam process to produce electric energy. The electric energy produced in these establishments is provided to electric power transmission systems or to electric power distribution systems.
22	Utilities	221113	Nuclear Electric Power Generation	This U.S. industry comprises establishments primarily engaged in operating nuclear electric power generation facilities. These facilities use nuclear power to produce electric energy. The electric energy produced in these establishments is provided to electric power transmission systems or to electric power distribution systems.
22	Utilities	221114	Solar Electric Power Generation	This U.S. industry comprises establishments primarily engaged in operating solar electric power generation facilities. These facilities use energy from the sun to produce electric energy. The electric energy produced in these establishments is provided to electric power transmission systems or to electric power distribution systems.
22	Utilities	221115	Wind Electric Power Generation	This U.S. industry comprises establishments primarily engaged in operating wind electric power generation facilities. These facilities use wind power to drive a turbine and produce electric energy. The electric energy produced in these establishments is provided to electric power transmission systems or to electric power distribution systems.
22	Utilities	221116	Geothermal Electric Power Generation	This U.S. industry comprises establishments primarily engaged in operating geothermal electric power generation facilities. These facilities use heat derived from the Earth to produce electric energy. The electric energy produced in these establishments is provided to electric power transmission systems or to electric power distribution systems.
22	Utilities	221117	Biomass Electric Power Generation	This U.S. industry comprises establishments primarily engaged in operating biomass electric power generation facilities. These facilities use biomass (e.g., wood, waste, alcohol fuels) to produce electric energy. The electric energy produced in these establishments is provided to electric power transmission systems or to electric power distribution systems.
22	Utilities	221118	Other Electric Power Generation	This U.S. industry comprises establishments primarily engaged in operating electric power generation facilities (except hydroelectric, fossil fuel, nuclear, solar, wind, geothermal, biomass). These facilities convert other forms of energy, such as tidal power, into electric energy. The electric energy produced in these establishments is provided to electric power transmission systems or to electric power distribution systems.
22	Utilities	221121	Electric Bulk Power Transmission and Control	This U.S. industry comprises establishments primarily engaged in operating electric power transmission systems and/or controlling (i.e., regulating voltages) the transmission of electricity from the generating source to distribution centers or other electric utilities. The transmission system includes lines and transformer stations.
22	Utilities	221122	Electric Power Distribution	This U.S. industry comprises electric power establishments primarily engaged in either (1) operating electric power distribution systems (i.e., consisting of lines, poles, meters, and wiring) or (2) operating as electric power brokers or agents that arrange the sale of electricity via power distribution systems operated by others.

Energy

The energy products manufacturing industry focuses on the design, production, and distribution of technologies and systems that generate, store, or utilize energy in more efficient ways. This industry includes a wide array of products, such as petroleum products, energy storage solutions like batteries, and renewable energy technologies such as solar panels and wind turbines. The energy sector consists of the following industries.

Sector Code	Sector Description	National Industry Code	National Industry Title	National Industry Description
22	Utilities	221210	Natural Gas Distribution	This industry comprises: (1) establishments primarily engaged in operating gas distribution systems (e.g., mains, meters); (2) establishments known as gas marketers that buy gas from the well and sell it to a distribution system; (3) establishments known as gas brokers or agents that arrange the sale of gas over gas distribution systems operated by others; and (4) establishments primarily engaged in transmitting and distributing gas to final consumers.
23	Construction	237120	Oil and Gas Pipeline and Related Structures Construction	This industry comprises establishments primarily engaged in the construction of oil and gas lines, mains, refineries, and storage tanks. The work performed may include new work, reconstruction, rehabilitation, and repairs. Specialty trade contractors are included in this industry if they are engaged in activities primarily related to oil and gas pipeline and related structures construction. All structures (including buildings) that are integral parts of oil and gas networks (e.g., storage tanks, pumping stations, and refineries) are included in this industry.Illustrative Examples:Distribution line, gas and oil, constructionOil refinery constructionGas main constructionPetrochemical plant constructionGathering line, gas and oil field, constructionNatural gas pipeline constructionPumping station, gas and oil transmission, constructionStorage tank, natural gas or oil, tank farm or field, constructionNatural gas processing plant construction
23	Construction	237130	Power and Communication Line and Related Structures Construction	This industry comprises establishments primarily engaged in the construction of power lines and towers, power plants, and radio, television, and telecommunications transmitting/receiving towers. The work performed may include new work, reconstruction, rehabilitation, and repairs. Specialty trade contractors are included in this industry if they are engaged in activities primarily related to power and communication line and related structures construction. All structures (including buildings) that are integral parts of power and communication networks (e.g., transmitting towers, substations, and power plants) are included.Illustrative Examples:Alternative energy (e.g., geothermal, ocean wave, solar, wind) structure constructionPower line stringingCellular phone tower constructionRadio transmitting tower constructionCo-generation plant constructionSatellite receiving station constructionCommunication tower constructionNuclear power plant constructionTelephone line stringingElectric light and power plant (except hydroelectric) constructionTransformer station and substation, electric power, constructionElectric power transmission line and tower constructionUnderground cable (e.g., fiber optic, electricity, telephone, cable television) laying
42	Wholesale Trade	424710	Petroleum Bulk Stations and Terminals	This industry comprises establishments with bulk liquid storage facilities primarily engaged in the merchant wholesale distribution of crude petroleum and petroleum products, including liquefied petroleum gas.

Appendix B

County Comparison Assessment

1 County Comparison Assessment Overview

The economic base in Whatcom County is unique to the rest of Washington state with its abundant natural resources, major international border crossing, robust maritime industry, and growing energy sector. To be help existing businesses in the county grow and to be competitive for new opportunities, the Port of Bellingham (Port) sought to understand the trends influencing the current industrial real estate market, trends in key industries that will influence how to position land so that it is attractive, and the current state of the industrial land supply relative to a range of future industrial employment projections. This study will help the Port, as Whatcom County Associate Development Organization, identify opportunity areas for investment and advocate for industrial policies to help make the county competitive.

The purpose of this county comparison report is to establish an economic baseline and evaluate development potential. The analysis of this report compares key indicators—such as demographics, labor force composition, industrial sector employment, wage levels, and real estate conditions. The county's performance is benchmarked against a set of peer jurisdictions that represent similar active industrial markets: Clark, Cowlitz, Lewis, King, Kitsap, Skagit, Snohomish, and Spokane, Counties. Most of these counties are positioned along the I-5 corridor, with Spokane County offering a point of comparison for industrial activity along the I-90 corridor.

2 Summary of Analysis

The economic baseline outlines conditions influencing industrial development in the county, including trends in demographics, labor force, industrial sector employment, wages, and real estate. Key economic components in the county are compared to the following counties to understand its competitiveness for industrial users: Clark County, Cowlitz County, Lewis County, King County, Kitsap County, Skagit County, Snohomish County, Spokane County, and Whatcom County. These competitive counties are generally located along the I-5 corridor besides Spokane County which represents competitive industrial development along the I-90 corridor.

Key Observations

Population: Population in the county is growing at a higher rate than the state and all other competitive counties besides Clark, King and Snohomish counties.

Employment: Unemployment in the county is slightly higher than in the State, Clark, King, Kitsap, Snohomish, Spokane, and Whatcom Counties, but lower than Cowlitz, Lewis, and Skagit Counties.

- Higher unemployment rates indicate Whatcom County needs to attract labor from counties with lower unemployment rates.
- Labor force participation for working age population, defined as people between the ages of 25 and 54, is the same in the county and state.
- Most residents both work and live in the county. Workers from outside of the county come from Skagit, King, and Snohomish Counties, not including Canadian workers.

Industry: Key industries such as food and beverage manufacturing were the only manufacturing industries to both grow the number of firms and jobs in Whatcom County between 2018 and 2023. The petroleum industry and wood product industry are consolidating (growing workers but losing firms). Warehouse and storage and other transportation and warehousing sectors were the only transportation and warehousing industries that grew in the County between 2018 and 2023.

- Manufacturing job growth slowed statewide (-0.9 percent) between 2018 and 2023. When compared to competitive the counties, the county lost manufacturing jobs annually at the highest rate (-2.5 percent) and Cowlitz County is gained manufacturing jobs at the highest rate (2.8 percent annually).
- Transportation and warehousing job growth in the county also declined between 2018 and 2023 at a rate of 1.5 percent per year. Statewide employment in this sector grew at a rate of 5.8 percent per year during the same time. Select competitive counties grew at an annual rate the same as or higher than the state including Spokane County (10.1 percent), Snohomish County (8.0 percent), and Whatcom County (5.8 percent).
- The number of manufacturing jobs is slipping (year over year and three-year decline) in the county. This is true for most competitive counties except for Cowlitz, Snohomish, and Spokane Counties which are either gaining or leading in manufacturing employment.

Wages: Average manufacturing sector (NAICS Code 33) and transportation and warehousing sector (NAICS Code s 48-49) wages are higher in Washington state overall compared to Whatcom County for every sector besides petroleum products (NAICS Code 324) and warehouse and storage (NAICS Code 493). In 2023 Snohomish County and King County were the only competitive counties with higher manufacturing wages than the state, surpassing state wages by over $10 per hour and $8 per hour, respectively. The county manufacturing wage growth rate was higher than the State, Cowlitz County, Skagit County, Snohomish County, and Whatcom County between 2018 and 2023.

County wages for transportation and warehousing were also lower than in the state in 2023. Cowlitz County and King County both exceeded 2023 transportation and warehousing wages in the State, by $26 per hour and $8 per hour, respectively. Annual wage growth between 2018 and 2023 was greater than six percent in Clark County, Cowlitz County, King County, and Kitsap County. County wages in transportation and warehousing had a lower annual growth rate than the State and one of the lowest annual growth rates among competitive counties between 2018 and 2023.

Real Estate: The county has one of the smallest inventories of industrial building space when compared to competitive counties with 13.7 million square feet of commercially available space (CoStar). A high percentage of the industrial land inventory in the county is used for manufacturing and a low percentage is used for distribution when compared to competitive counties. Over 73 percent of all industrial buildings in the county, including all of the county's industrial building space used for manufacturing, was built before 2010. However, the county has a larger inventory of recently built refrigeration/cold storage (330,000 square feet) than all competitive counties besides Pierce County (620,000 square feet) and more newly built food processing space (100,000 square feet) when compared to all competitive counties, which saw no new food processing development. Refrigeration/cold storage and food processing are complementary uses that can be further developed by improving the distribution industry in the County. The County has a smaller amount of proposed industrial building square footage and square footage of industrial buildings under construction when compared to most competitive counties.

Vacancy: County vacancy rates for industrial buildings were lower than in the state for most years between 2014 and 2024. By December 2024, the county had an industrial vacancy rate of 2.2 percent, 4.5 percentage points lower than the state (6.7 percent) and one of the lowest vacancy rates among competitive counties. Vacancy rates for overall industrial buildings grew in most competitive counties and the state between 2023 and 2024.

Rent: The county industrial rental rate was within $0.10 of the state industrial rental rate every year between 2014 and 2024. By December of 2024, only King County ($1.17/square foot) and Snohomish County

($1.08/square foot) had higher rent per square foot than the county ($1.02/square foot). The county rental rate for warehouse buildings was lower than in the state from 2018 to 2024. By contrast county rental rates for industrial uses, excluding warehousing uses, trended higher than in the during the same time.

Takeaways: The following analysis outlines the key economic opportunities and constraints in the county:

- County manufacturing employment is decreasing and no new industrial buildings dedicated to manufacturing have been delivered since 2010.
- There is an opportunity for employment growth in food and beverage processing. These growing sectors are supported by recent development of food processing and refrigeration/cold storage buildings.
- County vacancy rates are low and rental rates are high compared to competitive counties which indicates demand for industrial space is high in the county.
- Workforce development and economic development actions are needed in the County with high unemployment and low wages compared to the state.

3 Economic Baseline

3.1 Demographics

3.1.1 Population

A growing regional population is important to maintain a ready labor force. As of 2023, the county is home to 235,800 residents, the majority (50 percent) of which live in incorporated areas of the county. The city of Bellingham is the most populated city in the county, accounting for 41 percent of the countywide population. The population of the county grew at a rate of 1.4 percent per year between 2018 and 2023 which was faster than the state during the same time. Between 2018 and 2023 the unincorporated county gained about 2,263 residents and grew at a rate of only 0.6 percent a year; the slowest out of any county jurisdiction during that time (OFM 2024). The city of Ferndale experienced the highest growth rate between 2018 and 2023, growing at a rate of 3.4 percent per year. Table 3-1 shows the population growth of the state, City, and County jurisdictions between 2018 and 2023.

Table 3-1. Whatcom County Population Growth 2018-2023

Geography	2018 Population	2023 Population	Population Change	Annual Growth Rate
Whatcom County	**220,057**	**235,800**	**15,743**	**1.4%**
Unincorporated	91,552	94,175	2,623	0.6%
Incorporated	128,505	141,625	13,120	2.0%
Bellingham	88,439	95,960	7,521	1.7%
Blaine	5,588	6,310	722	2.6%
Everson	2,752	3,135	383	2.8%
Ferndale	13,929	16,330	2,401	3.4%
Lynden	14,827	16,520	1,693	2.3%
Nooksack	1,373	1,560	187	2.7%
Sumas	1,597	1,810	213	2.7%
Other Incorporated	17,797	19,890	2,093	2.4%
Washington State	*7,463,479*	*7,951,150*	*487,671*	*1.3%*

Source
OFM. 2024. Postcensal Estimates of April 1 Population. Washington State Office of Financial Management. June 28.

The county had a higher population growth rate between 2018 and 2023 compared to competitive counties across the state. Among the counties compared in this study, Clark County had the highest population growth rate between 2018 and 2023 at 1.9 percent per year. The county, Clark County, King County, and Snohomish County all grew faster than the state between 2018 and 2023. Cowlitz County, Lewis County, Kitsap County, Skagit County, Spokane County, Pierce County, and Whatcom County all grew at a slower rate than the State during the same time. Table 3-2 shows the population growth of selected Washington State Counties between 2018 and 2023.

Table 3-2. Statewide Population Growth 2018-2023

Geography	2018 Population	2023 Population	Population Change	Annual Growth Rate
Whatcom County	**220,057**	**235,800**	**15,743**	**1.4%**
Skagit County	125,895	132,000	6,105	1.0%
Snohomish County	801,223	859,800	58,577	1.5%
Kitsap County	269,280	283,200	13,920	1.0%
King County	2,187,460	2,347,800	160,340	1.5%
Pierce County	891,661	946,300	54,639	1.2%
Whatcom County	285,842	303,400	17,558	1.2%
Lewis County	80,250	84,075	3,825	1.0%
Cowlitz County	107,782	113,000	5,218	1.0%
Clark County	480,952	527,400	46,448	1.9%
Spokane County	522,337	554,600	32,263	1.2%
Washington State	*7,463,479*	*7,951,150*	*487,671*	*1.3%*

Source
OFM. 2024. Postcensal Estimates of April 1 Population. Washington State Office of Financial Management. June 28.

3.1.2 Working Age

The prime working age population is defined as the population between the ages of 25 and 54 (BLS n.d.). Between 2010 and 2020, the prime working age population in the county grew by 6,494 people, or 0.8 percent per year. Between 2020 and 2030, the state projects that the prime working age in the county will increase by another 9,750 people, or 1.2 percent, per year (WESD 2022). This is illustrated in Table 3-3.

Table 3-3. Whatcom County Prime Working Age Population Projection 2010 to 2030

Working Age	2010	2020	2030	2010–2020		2020–2030	
				Change	Annual Growth Rate	Change	Annual Growth Rate
25–29	14,019	14,759	14,613	740	0.5%	-146	-0.1%
30–34	12,150	15,189	14,540	3,039	2.5%	-649	-0.4%
35–39	11,676	14,684	15,885	3,008	2.6%	1,201	0.8%
40–44	12,319	13,690	17,649	1,371	1.1%	3,959	2.9%
45–49	13,532	12,650	16,297	-882	-0.7%	3,647	2.9%
50–54	13,797	13,015	14,753	-782	-0.6%	1,738	1.3%
Total	77,493	83,987	93,737	6,494	0.8%	9,750	1.2%

Source
WESD. 2022. Whatcom County Profile, Population by Age & Sex, Whatcom County, 1980 – 2040. Washington State Employment Security Division. Last Modified June 2022.

3.2 Labor Force

A growing, skilled, and willing regional labor force is foundational to support businesses operating in a region and for business attraction. A region's labor force includes all people aged 16 and older who are either working or actively looking for work. As of 2022, the labor force in the county totaled 117,472 people out of a total population aged 16 and older of 188,257. The labor force participation rate of the prime working age is 83 percent, and this age group comprises 62 percent of the region's labor force. Statewide the participation rate for this population is 83 percent and it comprises 65 percent of the statewide labor force. The county has the same working age labor force relative to the total working age population as the state. This data is summarized in Table 3-4.

Table 3-4. Whatcom County Labor Force

	Whatcom County		State of Washington	
Category	16 and over	Prime Working Age	16 and over	Prime Working Age
Total Population	188,257	84,449	6,209,213	3,163,061
Labor Force Participation	62%	83%	65%	83%
Active Labor Force	117,472	69,790	4,011,152	2,630,554
Employed Population	111,448	67,057	3,750,365	2,480,921
Unemployment Rate	5.1%	3.9%	6.5%	5.7%
Unemployed Population	6,024	2,733	260,787	149,633

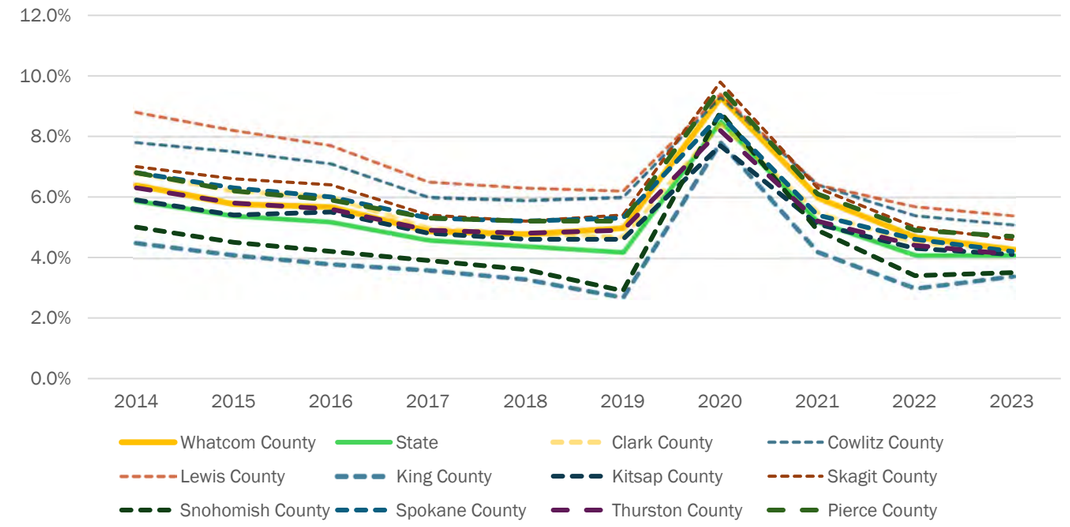
Source
US Census Bureau. 2023. Employment Status. American Community Survey, ACS 5-Year Estimates Subject Tables Washington State Employment Security Department.

3.3 Unemployment

Figure 3-1 illustrates unemployment trends of competitive Counties and the State between 2014 and 2023. The average unemployment rate between 2014 and 2023 in the County was 5.7 percent. The County unemployment rate in 2023 was 4.3 percent, the lowest it has been in the past ten years (BLS 2024). At the year-end 2023, Washington state's overall unemployment rate was 4.1 percent, tied with the 2022 employment rate as the lowest in the past ten years (BLS 2024). The low unemployment rate underscores the need to develop and retain the labor force that is younger than 25 and to encourage the working age population that is currently not in the labor force to reengage. New employment opportunities may also attract labor from outside the County.

In 2023 the county had a higher unemployment rate than the state, King County, Snohomish County, Spokane County, Pierce County, and Whatcom County, but a lower unemployment rate than Cowlitz County, Lewis County, and Skagit County. Table 3-5 shows average unemployment rate for competitive Counties and the State between 2014 and 2023. The county had a higher 10-year unemployment rate than the State by 0.5 percent in 2023. Higher unemployment rates indicate the need for employment attraction to the County.

Figure 3-1. Unemployment Comparison



Source
BLS. 2024.

Table 3-5 Average Unemployment Between 2014 and 2023

Geography	Unemployment Rate
Whatcom County	**5.7%**
Skagit County	6.2%
Snohomish County	4.5%
Kitsap County	5.2%
King County	4.0%
Pierce County	6.0%
Whatcom County	5.4%
Lewis County	7.1%
Cowlitz County	6.7%
Clark County	5.6%
Spokane County	5.8%
Washington State	*5.2%*

3.4 Labor Force Commuting Patterns

The United States Census OnTheMap tool captures commuting patterns within the United States (not including Canadian commuters). Domestic commute patterns for private workers employed in the county reveal that 68,900 people are employed in the county and 27 percent of these employees or 18,520 people, do not live in the county. Of the 75,296 people that live in the area, 33 percent, or 24,916 people, work outside of it. A destination analysis reveals that 67 percent of workers employed in the county also live in the county (Census 2024). Table 3-5 shows where county workers live and are employed. The most common employment

destinations for those that live in the county are King County (12 percent), Snohomish County (6.0 percent), and Skagit County (5.7 percent).

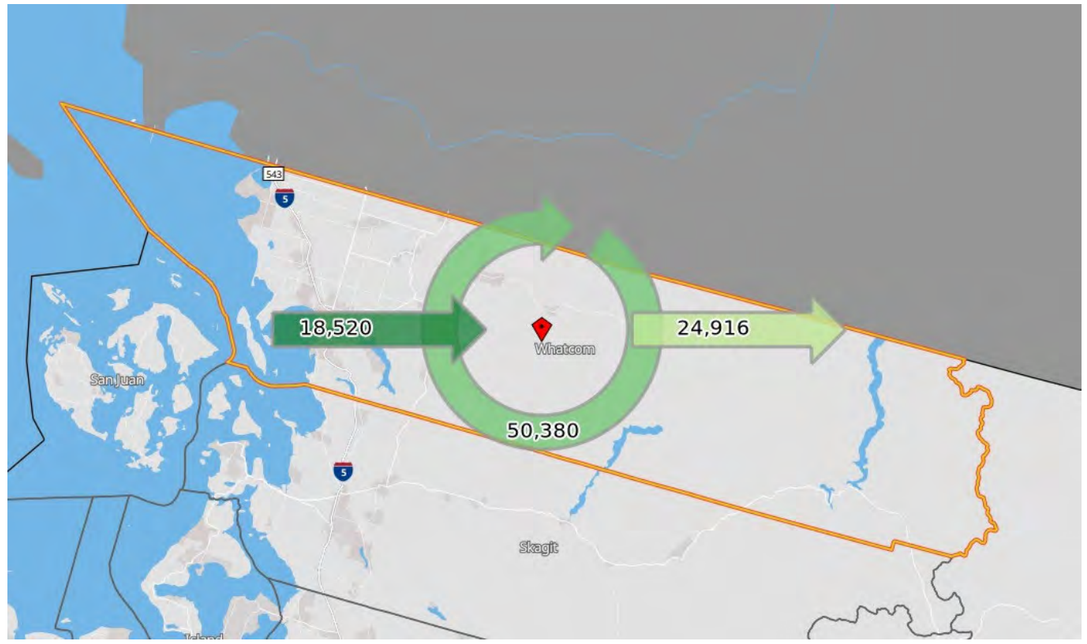
Labor force that does not live in Whatcom County but are employed there are most commonly commuting from the same counties: Skagit County (7.2 percent), King County (4.8 percent), or Snohomish County (3.9 percent). Figure 3-2 illustrates the inflow and outflow of workers in the County.

Table 3-6 Labor Force Commuting Origins and Destinations

County	Where County Residents Work	Where County Worker Reside
Whatcom	66.9%	73.1%
King	12.0%	4.8%
Skagit	5.7%	7.2%
Snohomish	5.9%	3.9%
Other	9.4%	11.1%

Source
Census. 2024. "OnTheMap" Longitudinal-Employer Household Dynamics Program. U.S. Census Bureau. Accessed November 06, 2024. https://onthemap.ces.census.gov

Figure 3-2. Commute Patterns



3.5 Industrial Sector Employment

Employment in the industrial sector is shrinking in the county. Manufacturing and transportation and warehousing industries lost both workers and percentage of total job share in the County between 2018 and 2023. Between 2018 and 2023 the number of manufacturing firms remained the same, despite the loss of upwards of 1,200 workers. During the same time, transportation and warehousing lost 10 firms and over 150 jobs.

3.5.1 Manufacturing and Warehousing in the County

The Port of Bellingham has identified seven target industries: manufacturing, food and beverage processing, technology, recreation, health and wellness, agriculture and maritime (Choose Whatcom 2024). Of those seven, four industries are manufacturing related (manufacturing, technology, maritime, and food and beverage processing). A closer look at the countywide employment trends between 2018 and 2023 for industrial and transportation and warehousing employment sectors, (the two-digit North American Industry Classification System [NAICS] code 31-33, and two–digit NAICS code 48-49, respectively) is summarized in the following bullets and are depicted in Table 3-6.

- Key industries such as food manufacturing (NAICS code 311) and Beverage and tobacco product manufacturing (NAICS code 312), gained both firms and workers between 2018 and 2023. Computer and electronic product manufacturing (NAICS code 334) maintained the same number of firms but gained nearly 60 jobs.
- Petroleum and coal products manufacturing (NAICS code 324) and wood products manufacturing (NAICS code 321) both lost a firm but gained workers and percent of total manufacturing jobs between 2018 and 2023.
- Printing and related support activities (NAICS code 323), textile product mills (NAICS code 314), Plastics and rubber products manufacturing (NAICS code 326), Fabricated metal product manufacturing (NAICS code 332), Machinery manufacturing (NAICS code 333), Electrical equipment and appliance manufacturing (NAICS code 335), and other industries lost both jobs and firms between 2018 and 2023.
- In 2018, Chemical manufacturing (NAICS code 325) and furniture and related product manufacturing (NAICS code 337) did not have enough firms to be accounted for by NAICS. By 2023, both industries had at least 10 firms and over 80 employees.
- Warehousing and storage (NAICS code 493) gained three firms and two employees between 2018 and 2023. Other industries doubled the number of firms and increased transportation and warehousing job share by eight percent. Support activities for transportation (NAICS code 488) lost firms, jobs and job share between 2018 and 2023 but remained the second highest employing transportation and warehousing industry.
- Truck transportation (NAICS code 484) accounted for the most amount of transportation and warehousing firms and jobs in the County in both 2018 and 2023 despite losing 10 firms and 65 workers during that time.

Table 3-7. Whatcom County Industrial Employment Trends, 2018 to 2023

Three-Digit NAICS Code and Industry Description	2018			2023		
	Firms	Jobs	% of Jobs	Firms	Jobs	% of Jobs
Manufacturing						
311: Food manufacturing	55	2,190	21%	62	2,271	25%
312: Beverage and tobacco product manufacturing	22	296	3%	29	361	4%
313: Textile mills	*	*	ND	*	*	ND
314: Textile product mills	18	411	4%	14	318	4%
315: Apparel manufacturing	*	*	ND	*	*	ND
316: Leather and allied product manufacturing	*	*	ND	*	*	ND
321: Wood products manufacturing	*25*	*1,273*	*12%*	*24*	*1,469*	*16%*
322: Paper Manufacturing	*	*	ND	*	*	ND
323: Printing and related support activities	16	196	2%	12	80	1%
324: Petroleum and coal products manufacturing	*5*	*1,234*	*12%*	*4*	*1,281*	*14%*
325: Chemical manufacturing	*	*	ND	17	95	1%
326: Plastics and rubber products manufacturing	13	327	3%	12	107	1%
327: Nonmetallic mineral product manufacturing	11	232	2%	11	159	2%
331: Primary metal manufacturing	*	*	ND	*	*	ND
332: Fabricated metal product manufacturing	45	412	4%	43	405	4%
333: Machinery manufacturing	25	484	5%	21	375	4%
334: Computer and electronic product manufacturing	11	283	3%	11	342	4%
335: Electrical equipment and appliance manufacturing	10	345	3%	*	*	ND
336: Transportation equipment manufacturing	26	1,019	10%	27	549	6%
337: Furniture and related product manufacturing	*	*	ND	12	83	1%
339: Miscellaneous manufacturing	27	572	6%	27	557	6%
Other industries	35	1,003	10%	22	602	7%
Manufacturing Total	**344**	**10,276**	**11.3%[d]**	**344**	**9,052**	**9.7%**
Transportation and Warehousing						
481: Air transportation	4	179	8%	4	158	7%
482: Rail Transport	0	0	0%	0	0	0%
483: Water Transport	*	*	ND	*	*	ND
484: Truck transportation	96	777	33%	86	712	33%
485: Transit and ground passenger transportation	6	163	7%	*	*	ND
486: Pipeline transportation	0	0	0%	0	0	0%
487: Scenic and sightseeing transportation	3	2	0%	*	*	ND
488: Support activities for transportation	57	710	31%	55	603	28%
491: Postal service	*	*	ND	*	*	ND
492: Couriers and messengers	9	247	11%	7	269	12%
493: Warehousing and storage	7	225	10%	10	227	11%
Other industries	7	23	1%	14	190	9%
Transportation and Warehousing Total	**186**	**2,324**	**2.5%**	**176**	**2,158**	**2.3%**
Total	**529**	**12,600**		**378**	**11,210**	

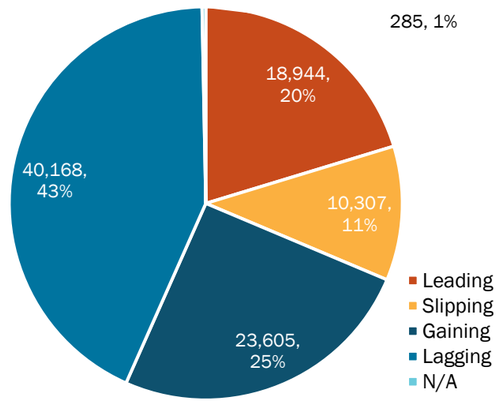
Notes
NAICS = North American Industry Classification System.
[a] NAICS Code 31-33: Manufacturing.
[b] The Other industries row sums the industries that had less than three companies in 2018 and 2023. Because the number of firms was below this threshold, the jobs could not be reported at the NAICS level. These firms are noted with an asterisk, *.
[c] NAICS Code 48-49: Transportation and warehousing.
[d] Industry totals percentage are percent of total jobs in the County

Source
WESD. 2018-2023.

Leading/Gaining/Slipping/Lagging Industry Assessment

One way to assess the economic performance of a local economy is to conduct an LSGL (leading, slipping, gaining, lagging) assessment. This analysis helps to identify the major industry sectors in a region that have grown overall, both recently and in the longer term relative to the state (leading), industries that have not been growing in the long- or short-term (lagging), industries that have recently gained by posting growth above par, in contrast to their more general subpar performance in the past (gaining), and industries whose growth has outpaced the state historically, but the year over year change in the region has been less than the state's growth (slipping).

Figure 3-3. Jobs by LGSL Category, 2023



Nearly half (45 percent) of the regional employment is in an industry that is either leading or gaining. Education is the leading county industry with the highest one-year (0.9 percent) and 10-year (4.8 percent) increase in employment share among all county industries (WESD 2024). Manufacturing is slipping, having gained close to no new employees between 2022 and 2023, and only one percent growth between 2013 and 2023. Manufacturing in the county has historically outpaced the state but has fallen behind in the most recently recorded annual growth estimate. Transportation and warehousing grew 0.3 percent employment between 2013 and 2023 but lost 0.1 percent between 2022 and 2023. Figure 3-3 summarizes this analysis.

The manufacturing sector is categorized as a "Slipping" industry and the transportation and warehousing sector is categorized as a "Lagging" industry in the region The annual manufacturing employment growth rate surpassed the long-term statewide average (0.1% compared to -0.5% per year between 2013 and 2023) but fell below the statewide average in the near-term (0.0% compared to 0.2% between 2022 and 2023).

Industrial employment is mostly slipping or lagging across competitive counties. The exceptions are Cowlitz and Spokane Counties which are leading and Snohomish County which is gaining in manufacturing. All competitive counties are either slipping or lagging in transportation and warehousing employment besides Lewis County, which is gaining. This is illustrated in Table 3-8.

Table 3-8. County Comparison: Jobs by LGSL Category

NAICS	Manufacturing	Transportation and Warehousing
Whatcom County	Slipping	Lagging
Skagit County	Slipping	Lagging
Snohomish County	Gaining	Slipping
Kitsap County	Slipping	Lagging
King County	Lagging	Lagging
Pierce County	Slipping	Lagging
Whatcom County	Slipping	Lagging
Lewis County	Slipping	Gaining
Cowlitz County	Leading	Lagging
Clark County	Slipping	Lagging
Spokane County	Leading	Slipping

Source
WESD. 2024.

3.5.2 County Employment Comparison

Employment in the manufacturing sector is shrinking in the county and across the state. The county has the highest rate of loss compared to other competitive counties. Other counties experiencing a loss of manufacturing employment include King County, Kitsap County, Lewis County, Pierce County, Skagit County, and Snohomish County. Despite statewide loss, growth in manufacturing employment occurred in Clark County, Spokane County, Whatcom County, and Cowlitz County which experienced the largest growth out of similar counties. Table 3-9 shows trends in manufacturing employment among competitive counties and the state.

Table 3-9. County Comparison: Manufacturing Employment Trends

Geography	2018	2023	Change	Compound Annual Growth Rate
Whatcom County	**10,276**	**9,052**	**-1,224**	**-2.5%**
Skagit County	6,052	5,732	-320	-1.1%
Snohomish County	58,500	53,867	-4,633	-1.6%
Kitsap County	2,744	2,583	-161	-1.2%
King County	102,110	92,822	-9,288	-1.9%
Pierce County	17,087	16,536	-551	-0.7%
Whatcom County	3,064	3,269	205	1.3%
Lewis County	3,409	3,029	-380	-2.3%
Cowlitz County	6,415	7,371	956	2.8%
Clark County	14,130	14,326	196	0.3%
Spokane County	15,942	16,477	535	0.7%
Washington State	*284,094*	*270,979*	*-13,115*	-0.9%

Source
WESD. 2018-2023.

Employment in the transportation and warehousing sector is shrinking in the county but growing statewide. Other counties experiencing a loss of manufacturing employment include Cowlitz and Lewis County. Clark County, King County, Kitsap County, Pierce County, Skagit County, Snohomish County, Spokane County, and Whatcom County followed the statewide trend of growth between 2018 and 2023. Most notably, Spokane County experienced a compound annual growth rate of over 10 percent during that time. Table 3-10 shows trends in transportation and warehousing employment among competitive counties and the state.

Table 3-10. County Comparison: Transportation and Warehousing Employment Trends

Geography	2018	2023	Change	Compound Annual Growth Rate
Whatcom County	**2,324**	**2,158**	**-166**	**-1.5%**
Skagit County	1,314	1,467	153	2.2%
Snohomish County	4,390	6,463	2,073	8.0%
Kitsap County	1,025	1,122	97	1.8%
King County	50,671	62,471	11,800	4.3%
Pierce County	17,376	19,579	2,203	2.4%
Whatcom County	2,377	3,156	779	5.8%
Lewis County	3409	3,029	-380	-2.3%
Cowlitz County	1440	1,265	-175	-2.6%
Clark County	3517	3,533	16	0.1%
Spokane County	6,074	9,831	3,757	10.1%
Washington State	*103,459*	*136,978*	*33,519*	*5.8%*

Source
WESD. 2018-2023.

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3.6 Wages

Annual manufacturing and transportation and warehousing wages in the county lagged those in Washington state overall in 2023 by 22.8 percent and 32 percent, respectively. The only manufacturing industry that surpassed state wages was Petroleum and coal products manufacturing, which was 12.5 percent higher than in the state. Warehousing and storage wages were the only transportation and warehousing industry with wages higher than in the state. Table 3-11 shows county and state wages for industrial sectors in 2023.

Table 3-11. County Wages in Industrial Subsectors, 2023

Industry/Subsector	County Hourly Rate	Statewide Hourly Rate	Delta	Percent Difference
Manufacturing (31-33)	$36.38	$44.68	-$8.30	-22.8%
Manufacturing Subsectors				
Food manufacturing	$24.40	$29.20	-$4.80	-19.7%
Beverage and tobacco product manufacturing	$17.66	$22.93	-$5.27	-29.8%
Textile mills	ND	$29.02	ND	ND
Textile product mills	$30.65	$26.50	$4.15	13.5%
Apparel manufacturing	ND	$27.91	ND	ND
Leather and allied product manufacturing	ND	$25.36	ND	ND
Wood product manufacturing	$30.40	$32.91	-$2.51	-8.3%
Paper manufacturing	ND	$44.73	ND	ND
Printing and related support activities	$21.41	$29.33	-$7.92	-37.0%
Petroleum and coal products manufacturing	$88.16	$77.13	$11.03	12.5%
Chemical manufacturing	$23.39	$47.95	-$24.56	-105.0%
Plastics and rubber products manufacturing	$29.13	$31.46	-$2.33	-8.0%
Nonmetallic mineral product manufacturing	$34.87	$37.63	-$2.76	-7.9%
Primary metal manufacturing	ND	$39.37	ND	ND
Fabricated metal product manufacturing	$28.94	$32.98	-$4.04	-14.0%
Machinery manufacturing	$33.97	$39.61	-$5.64	-16.6%
Computer and electronic product manufacturing	$26.35	$57.11	-$30.76	-116.7%
Electrical equipment, appliance, and component manufacturing	ND	$43.18	ND	ND
Transportation equipment manufacturing	$25.87	$60.91	-$35.04	-135.4%
Furniture and related product manufacturing	$20.68	$26.84	-$6.16	-29.8%
Miscellaneous manufacturing	$27.96	$42.14	-$14.19	-50.8%
Transportation and Warehousing (48-49)	$27.56	$36.38	-$8.82	-32.0%
Warehousing Subsectors				
Air transportation	$30.90	$56.01	-$25.12	-81.3%
Water transportation	ND	$52.47	ND	ND
Truck transportation	$29.73	$31.89	-$2.16	-7.3%
Transit and ground passenger transportation	ND	$29.23	ND	ND
Scenic and sightseeing transportation	ND	$24.85	ND	ND
Support activities for transportation	$25.98	$43.45	-$17.47	-67.3%
Postal service	ND	ND	ND	ND
Couriers and messengers	$27.46	$32.46	-$5.00	-18.2%
Warehousing and storage	$30.56	$28.47	$2.09	6.8%
Other transportation and warehousing	$18.06	$21.00	-$2.94	-16.3%

Notes
Wages shown are average hourly rates based on the annual wages reported by the ESD in the QCEW data divided by the number of hours worked per year of 2,088 hours.

Source
WESD. 2024.

3.6.1 Manufacturing Wages County Comparison

Compared to the state, most competitive counties including Whatcom County lagged in manufacturing wages by over five dollars per hour in 2023. Despite lagging state manufacturing wages, the county, Clark County, Cowlitz County, Lewis County, King County, Kitsap County and Spokane County had higher annual wage growth between 2018 and 2023. In 2023 Snohomish County and King County were the only competitive counties with higher manufacturing wages, surpassing State wages by over $10 per hour and $8 per hour, respectively. Spokane County manufacturing wages were over $10 per hour less than state manufacturing wages in 2023, but annual wage growth in Spokane County between 2018 and 2023 was highest among competitive counties (5.5 percent). This is illustrated in Table 3-12.

Table 3-12. County Comparison: Manufacturing Annual Hourly Wages, 2023

Geography	2018	2023	Change	Annual Growth Rate	Deviation from State (2023)
Whatcom County	**$30.28**	**$36.38**	**$6.11**	**4.0%**	**-$8.30**
Skagit County	$32.90	$36.52	$3.61	2.2%	-$8.17
Snohomish County	$48.48	$55.40	$6.92	2.9%	$10.72
Kitsap County	$25.63	$31.17	$5.55	4.3%	-$13.51
King County	$43.99	$52.87	$8.88	4.0%	$8.19
Pierce County	$30.57	$35.88	$5.31	3.5%	-$8.80
Whatcom County	$26.38	$31.09	$4.71	3.6%	-$13.59
Lewis County	$27.80	$34.35	$6.55	4.7%	-$10.33
Cowlitz County	$35.26	$39.48	$4.22	2.4%	-$5.20
Clark County	$28.74	$35.69	$6.95	4.8%	-$8.99
Spokane County	$26.11	$33.23	$7.13	5.5%	-$11.45
Washington State	*$38.00*	*$44.68*	*$6.68*	*3.5%*	

Source
WESD. 2024.

Like manufacturing wages, transportation and warehousing wages in majority of competitive counties were lower than wages in the state in 2023. Both King County and Cowlitz County surpassed statewide wages by $8.30 per hour and $26.44 per hour, respectively. Annual wage growth between 2018 and 2023 was greater than six percent in Clark County, Cowlitz County, King County, and Kitsap County. County wages in transportation and warehousing had a lower annual growth rate than the state and one of the lowest annual growth rates among competitive counties between 2018 and 2023.

Table 3-13. Transportation and Warehousing Trends

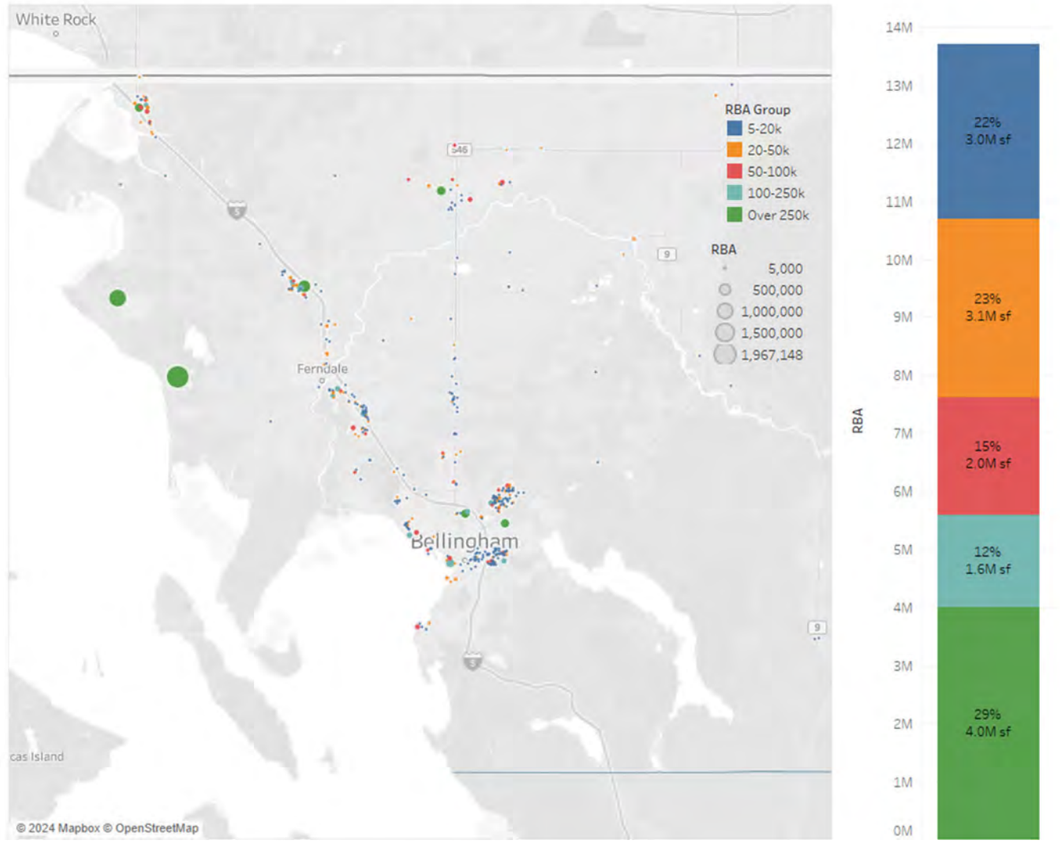
Geography	2018	2023	Change	Annual Growth Rate	Deviation from State (2023)
Whatcom County	**$23.33**	**$27.56**	**$4.22**	**3.6%**	**-$8.82**
Skagit County	$23.69	$28.84	$5.15	4.3%	-$7.54
Snohomish County	$26.80	$30.30	$3.50	2.6%	-$6.08
Kitsap County	$18.41	$26.67	$8.25	9.0%	-$9.72
King County	$33.51	$44.69	$11.18	6.7%	$8.30
Pierce County	$25.05	$32.28	$7.22	5.8%	-$4.10
Whatcom County	$21.32	$27.25	$5.93	5.6%	-$9.13
Lewis County	$21.15	$26.78	$5.63	5.3%	-$9.60
Cowlitz County	$46.33	$62.82	$16.49	7.1%	$26.44
Clark County	$25.35	$35.12	$9.77	7.7%	-$1.26
Spokane County	$23.59	$27.80	$4.20	3.6%	-$8.58
Washington State	*$28.90*	*$36.38*	*$7.49*	*5.2%*	

Source
WESD. 2024.

3.7 Industrial Real Estate

Whatcom County has 13.7 million square feet of commercially available industrial development (CoStar). The largest portion of this industrial building inventory (29 percent) consists of buildings over 250,000 square feet. Notable large developments in the unincorporated county include the Alcoa and BP facilities along the Georgia Straight, west of Ferndale. Buildings that are 20,000 to 50,000 square feet make up 23 percent of the industrial building stock in the county and are concentrated in Bellingham, Ferndale, and Blaine. Small industrial buildings (5,000 to 20,000 square feet) make up 22 percent of the industrial stock in the county and are clustered west of Bellingham and south of Ferndale. Figure 3-4 shows distribution of county industrial buildings by size.

Figure 3-4. County Industrial Buildings



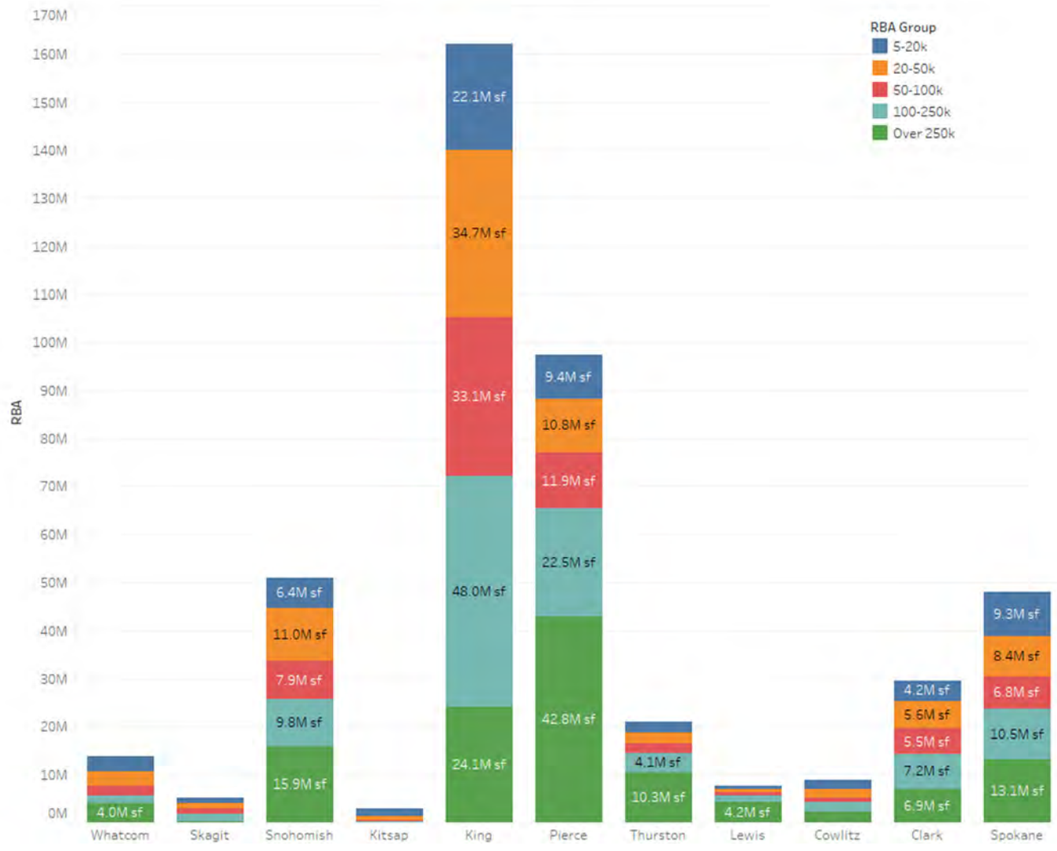
Source
CoStar. 2024.

Notes
RBA= rentable building area, sf= square feet

3.7.1 Industrial Building Inventory by County

The county has one of the smallest inventories of industrial buildings when compared to competitive counties. Among competitive counties, only Cowlitz County, Kitsap County, Lewis County, and Skagit County have less rentable building area of built industrial space than the county. King County has over 160 million square feet of built industrial space, the highest amount among competitive counties. Pierce County follows with over 97 million square feet of built industrial space which is bolstered by a strong inventory of over 42 million square feet of large industrial buildings (250,000 square feet or more). The county (13.7 million square feet) sits between Cowlitz County (8.7 million square feet) and Whatcom County (20.9 million square feet) in terms of total built industrial space. The county has over eight million more square feet of total built industrial space than its neighbor to the south, Skagit County (5 million square feet).

Figure 3-5. Industrial Building by County



Source
CoStar. 2024.

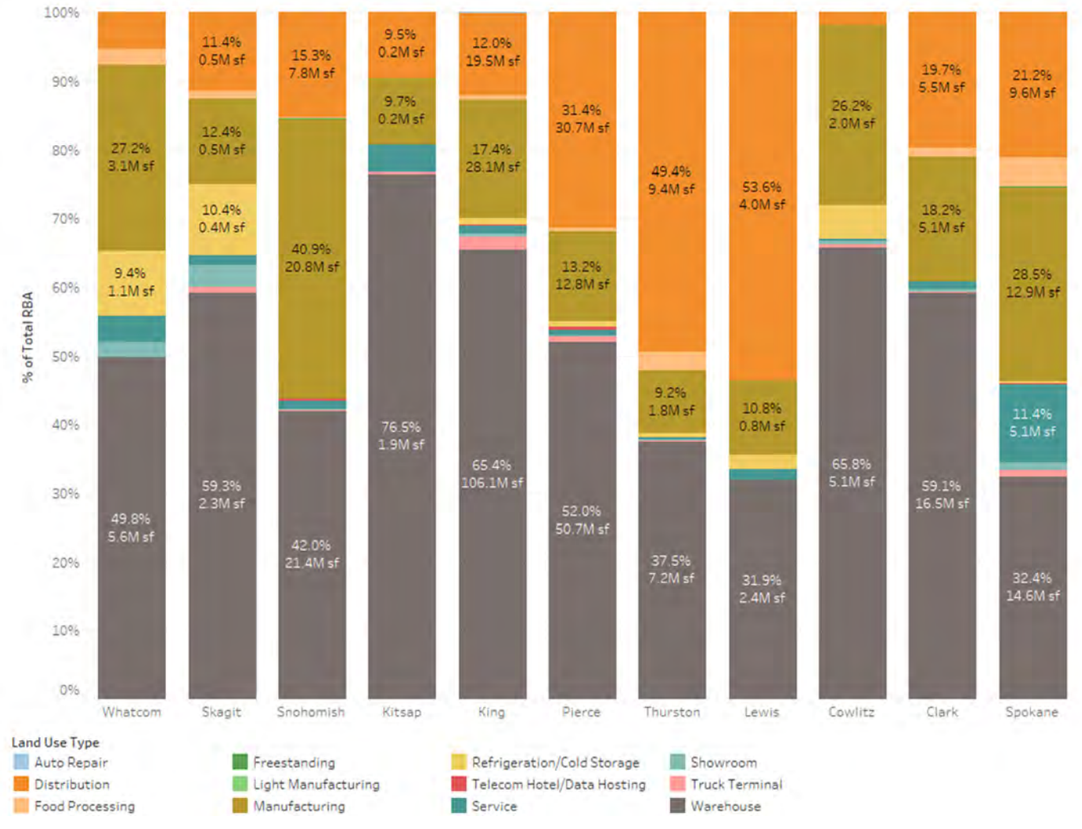
Notes
M=Million, RBA= rentable building area, sf=square feet

Distribution of Buildings by Type

Warehousing and distribution uses make up most of all built industrial space across all competitive counties when looking at industrial building square footage by land use type (Figure 3-6). Nearly 50 percent of the county's industrial building stock consists of warehousing use. The second largest industrial use type in the county is manufacturing, which makes up over 3.1 million acres (27 percent) of built industrial area.

The county has more built manufacturing space than Whatcom County and Cowlitz County; counties with the most similarly sized total industrial inventory across all competitive counties. Competitive counties with larger total inventories of built industrial square footage such as Snohomish County, King County, Pierce County, Clark County, and Spokane County have more built manufacturing space than the County. Snohomish County and Spokane County are the only other competitive counties that have a higher percentage of manufacturing use in their built industrial inventory.

Figure 3-6. Built Industrial Land by Type



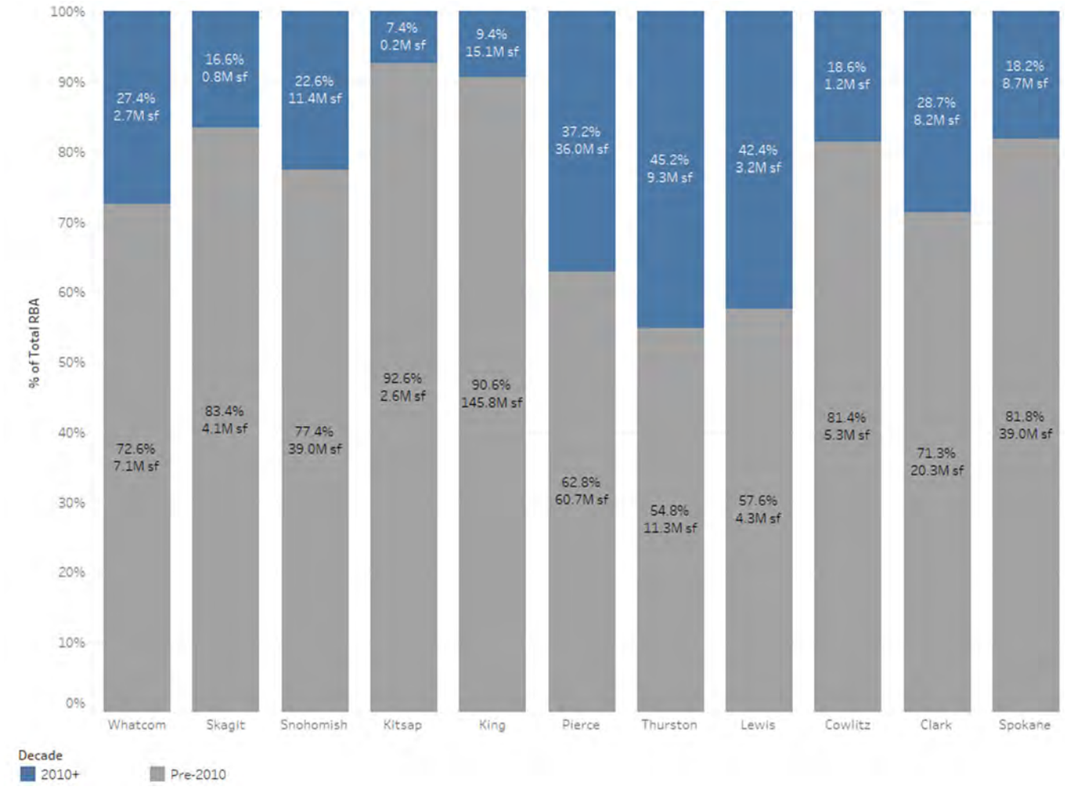
Source
CoStar. 2024.

Notes
M=Million, RBA= rentable building area, sf=square feet

Only Kitsap County and Skagit Counties have fewer square feet of built distribution space among competitive counties. However, over nine percent of the County's built industrial space (1.1 million square feet) is used for refrigeration/cold storage. Skagit County is the only competitive county with a higher percentage of refrigeration/cold storage space in its industrial inventory than the county. King County (1.5 million square feet) is the only competitive county with more total built refrigeration/cold storage space than the county.

Figure 3-7 presents industrial inventory in competitive counties grouped by construction date (before or after 2010). Over 73 percent of the industrial building stock in the county (7.1 million square feet) was built prior to 2010. The county has only delivered 2.7 million square feet of industrial space since 2010, a smaller amount than Clark, King, Lewis, Pierce, Snohomish, Spokane, and Whatcom counties. Whatcom County (45 percent), Lewis County (42 percent), and Pierce County (37 percent) have the highest percentage of industrial building square footage built after 2010 when compared to competitive counties. King County has the most square footage of built industrial land among competitive counties, but the second smallest percentage of industrial buildings constructed after 2010.

Figure 3-7. Percentage by Year Built

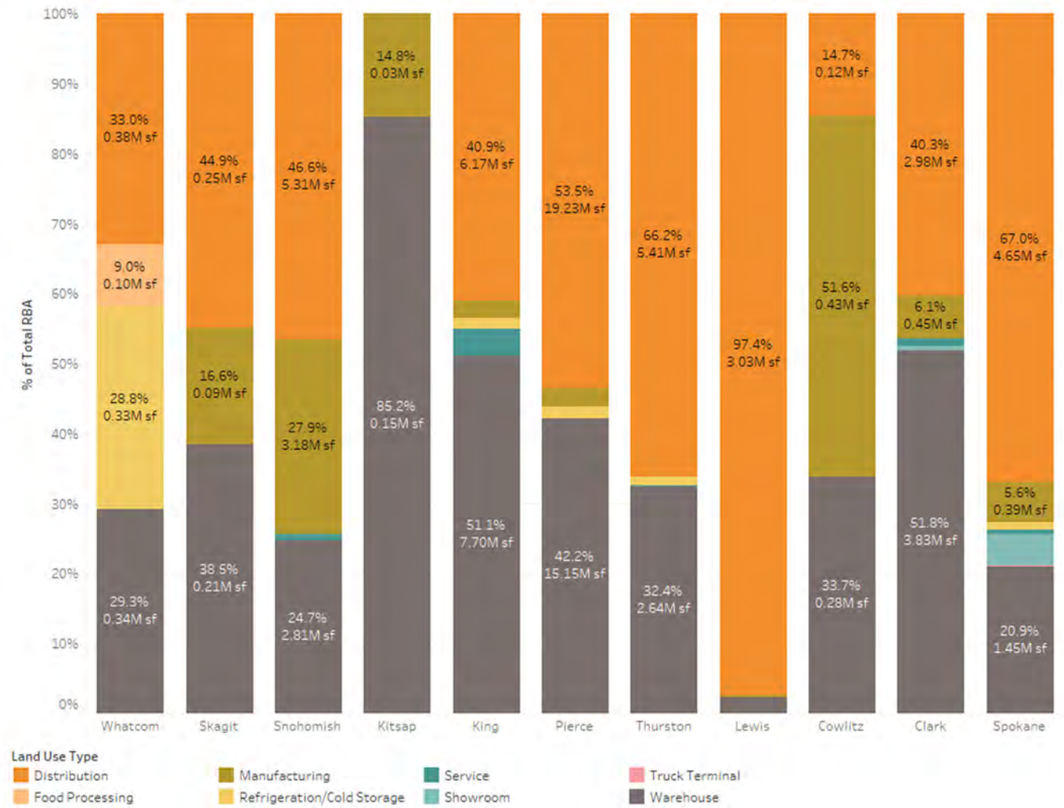


Source:
CoStar. 2024.

Notes
M=million, RBA= rentable building area, sf= square feet

Figure 3-8 shows the distribution of industrial building space by use type for buildings constructed in competitive counties after 2010. Most of the newly built industrial space is dedicated to warehousing and distribution across all competitive counties. When compared to land uses of industrial buildings constructed after 2010 in competitive counties, the county has the highest percentage of industrial refrigeration/cold storage (28.8) percent and food processing (9.0 percent). Only Pierce County has a higher amount of recently built refrigeration/cold storage industrial space (620,000 square feet) than the county (332,000 square feet). The county has the highest amount of food processing industrial building space built after 2010 (103,000 square feet) across competitive counties. Cowlitz county is the only competitive county with a manufacturing majority percentage in newly built industrial building space, albeit only 430,000 square feet. Snohomish County (3.2 million square feet), Pierce County (900,000 square feet), and Clark County (500,000 square feet) have the highest total amount of manufacturing building space constructed after 2010 when compared to competitive counties. Skagit County delivered more manufacturing space than the County, which did not deliver any manufacturing space after 2010.

Figure 3-8 Industrial Buildings Built after 2010 by Type



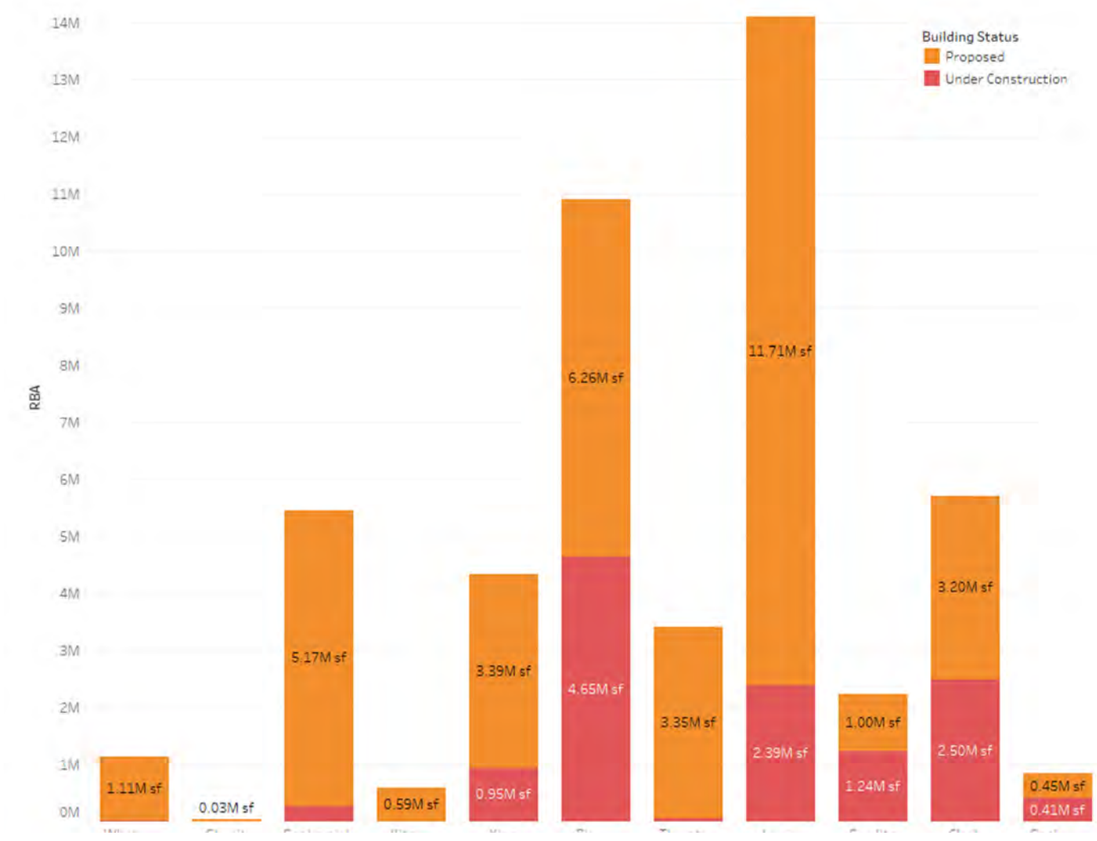
Source
CoStar. 2024.

Notes
M=million, RBA= rentable building area, sf= square feet

Future industrial development can be measured by the number of industrial buildings that are currently permitted or under construction. Figure 3-9 shows square footage of proposed industrial building square footage and square footage of buildings under construction in competitive counties. According to CoStar, as of December 2024 Lewis County has nearly 12 million square feet of proposed industrial building square footage, the highest amount of industrial building square footage compared to competitive countries. The county has around 1.1 million square feet of proposed industrial development, less than a tenth of proposed industrial development compared to Lewis County. The county has more proposed industrial building space than Cowlitz County, Kitsap County, Skagit County, and Spokane Counties.

Clark, King, Pierce, Snohomish, and Whatcom Counties have over 3 million square feet of proposed industrial building space. Pierce County has the most amount of industrial building square footage under construction (4.7 million square feet) compared to competitive counties. By comparison, the county only has 20,000 square feet of industrial building space under construction.

Figure 3-9 Industrial Building Pipeline



Source:
CoStar. 2024.

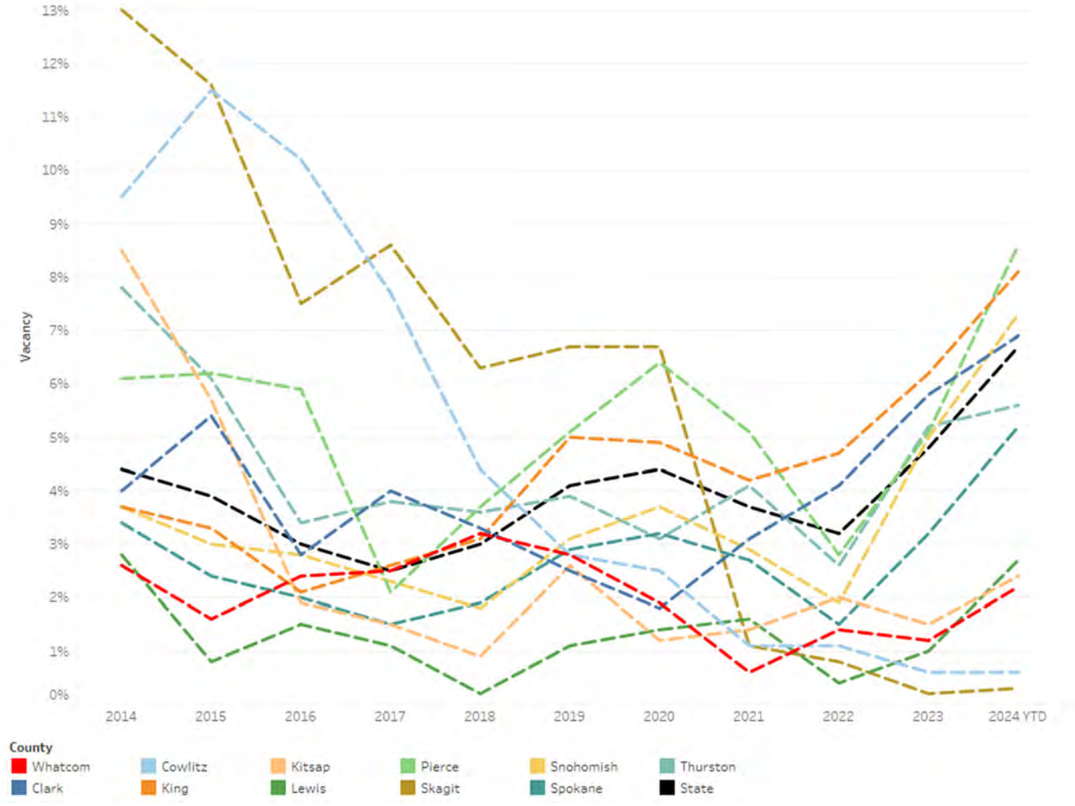
Notes
RBA= rentable building area, sf= square feet

3.7.2 Vacancy

Overall Industrial Vacancy

The industrial vacancy rate in the county ranged between 0.6 percent and 3.2 percent between 2014 and 2024 (Figure 3-10). This has typically been lower than state vacancy rates during the same time. As of December 2024, the county vacancy rate across all industrial uses is 2.2 percent, which is 4.5 percentage points lower than the state (6.7 percent). Skagit County dropped from the highest vacancy rate (13.0 percent) in 2014 to the lowest across competitive counties in 2024 (0.3 percent). Among competitive counties and the state in 2024, only Skagit County (0.3 percent) and Cowlitz County (0.6 percent) had lower industrial vacancy rate than the county (2.2 percent). Pierce County and King County, the counties with the most total industrial square footage, had the highest vacancy rates among competitive counties in 2024.

Figure 3-10. Overall Industrial Vacancy



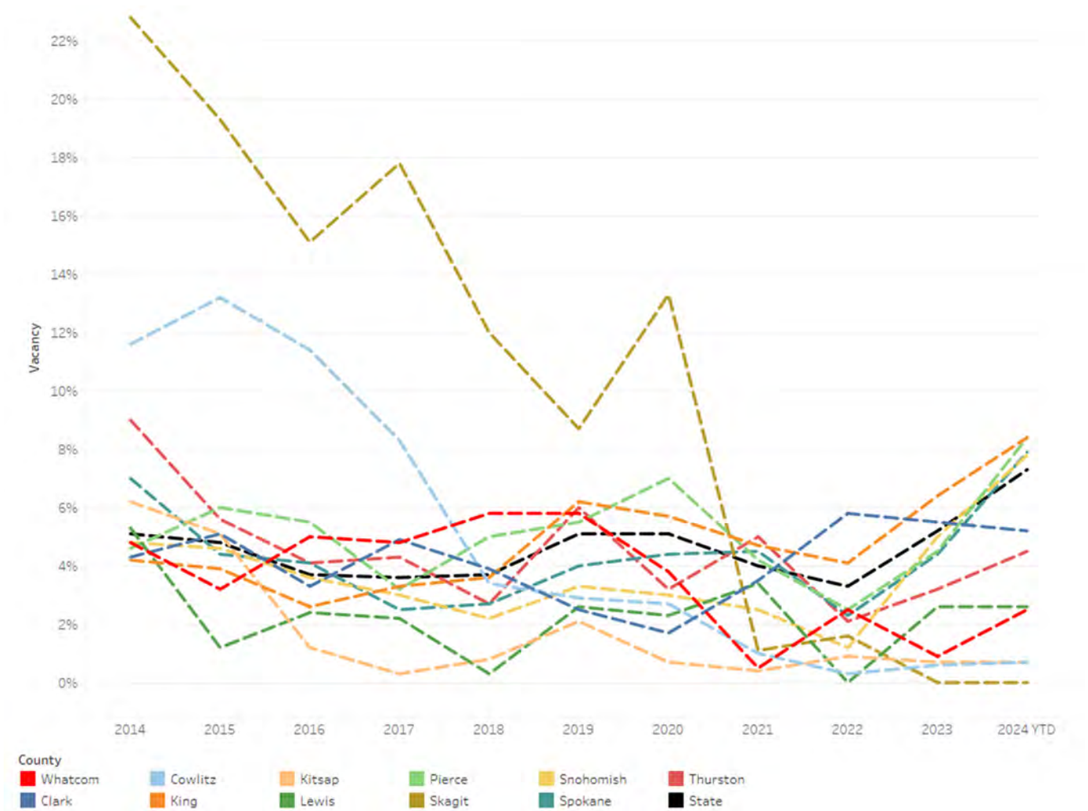
Source:
CoStar. 2024.

Notes
YTD= year to date

Warehousing Vacancy

Figure 3-11 shows vacancy trends for industrial buildings with warehousing use across competitive counties. Vacancy rates for industrial building space dedicated to warehousing uses align with the overall industrial vacancy rates in competitive counties and the state identified in Section 3.6.1.1.

Figure 3-11. Warehouse Use Vacancy



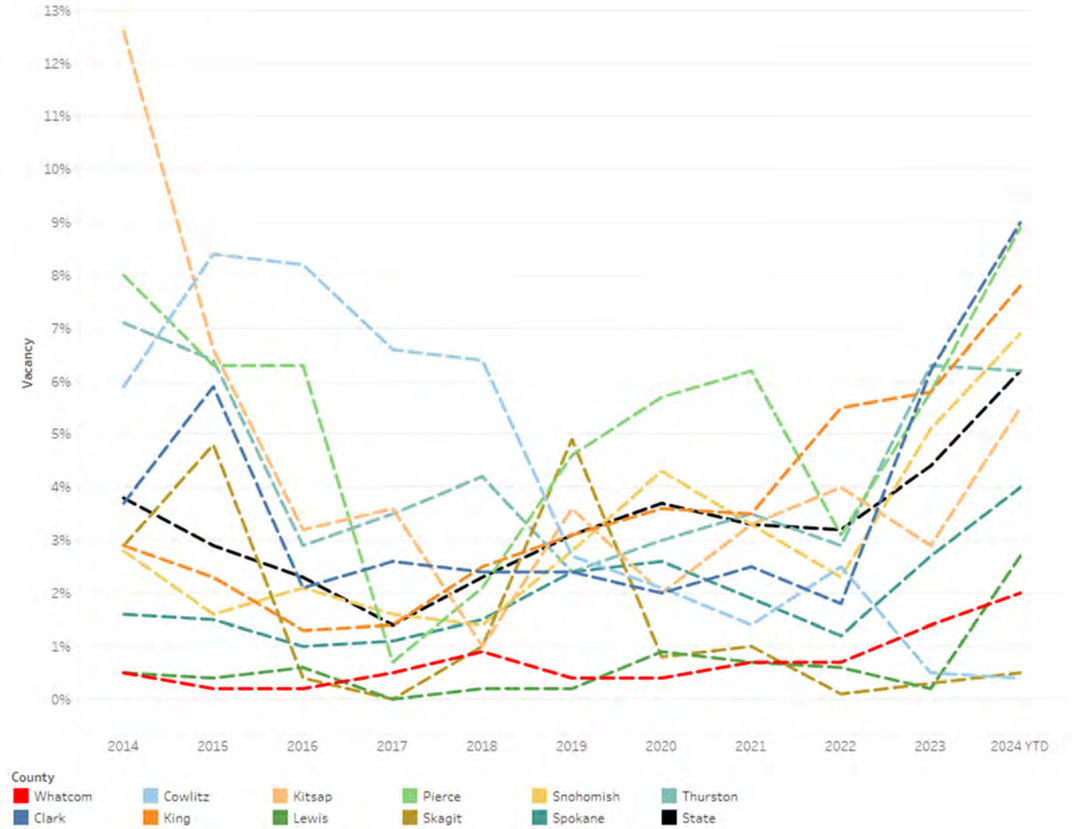
Source:
CoStar. 2024.

Notes
YTD= year to date

Vacancy Rates for Other Industrial Uses

Vacancy rates for industrial uses (excluding warehousing uses) deviate from trends recognized in the overall industrial building inventory across competitive counties. Vacancy rates for non-warehousing industrial buildings grew in most competitive counties across the state between 2023 and 2024. The county had lower vacancy rates in industrial buildings not used for warehousing than the state and most competitive counties from 2014 to 2024. As of December of 2024, Skagit County and Cowlitz County have the lowest vacancy rates for non-manufacturing industrial buildings compared to competitive counties and the state.

Figure 3-12. Vacancy Rates for Industrial Uses Other Than Warehousing



Source:
CoStar. 2024.

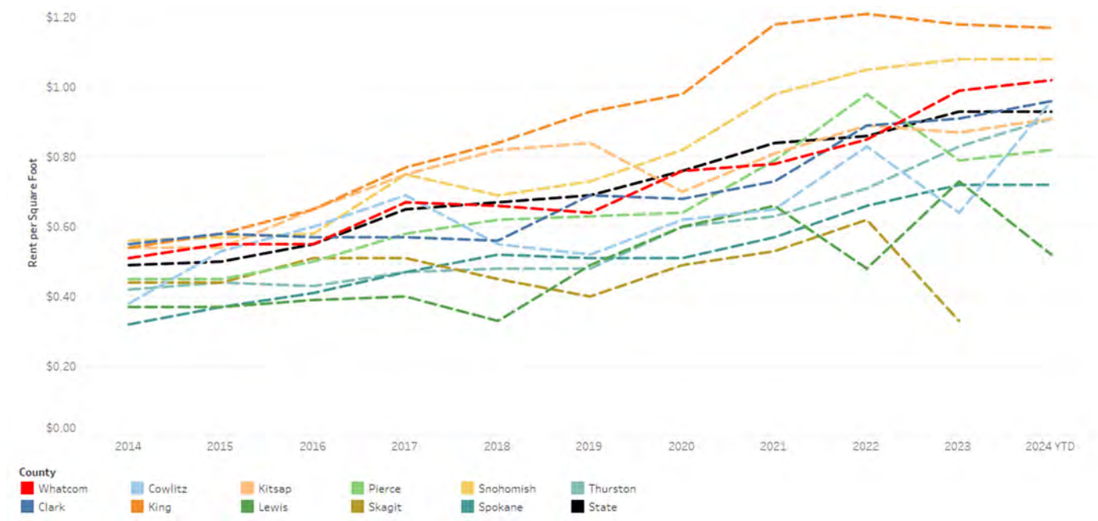
Notes
YTD= year to date

3.7.3 Rent

Overall Industrial Rental Rates

The county rental rate per square foot doubled from $0.51 in 2014 to $1.02 in December of 2024 (Figure 3-13). By December of 2024, only King County ($1.17 per square foot) and Snohomish County ($1.08 per square foot) had higher rent per square foot than the County ($1.02 per square foot). The County industrial rental rate was within $0.10 of the state industrial rental rate every year between 2014 and 2024. Skagit County industrial rental rates remained below County rental rates between 2014 and 2024. In December of 2024, Lewis County had the lowest rent per square foot compared to competitive counties at $0.52 per square foot, followed by Spokane County at $0.72 per square foot.

Figure 3-13. Overall Industrial Rental Rates



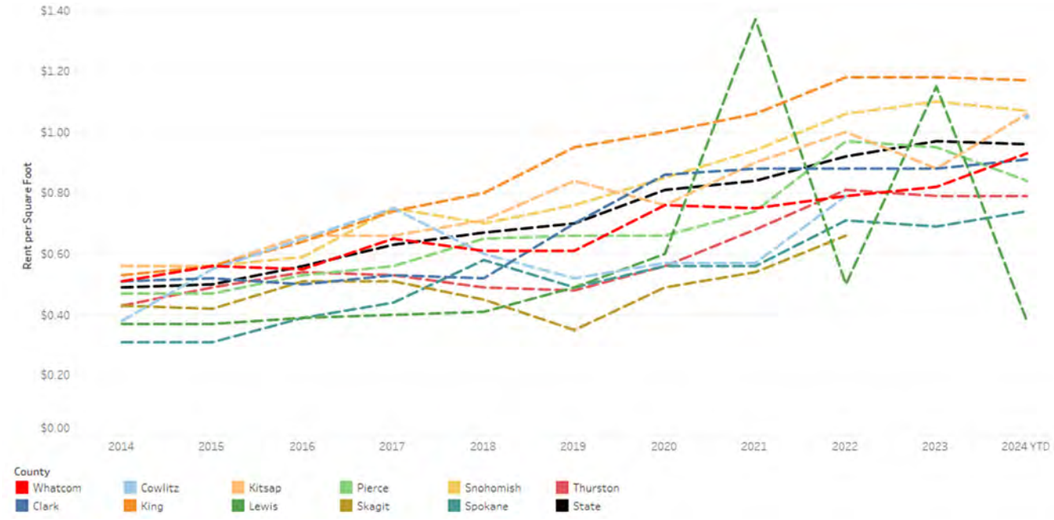
Source:
CoStar. 2024.

Notes
YTD= year to date

Rental Rates for Warehousing Use

Figure 3-14 shows rental rates per square foot for industrial buildings with warehousing use across competitive counties and the state. The county rental rate for warehouse buildings was lower than in the state from 2018 to 2024. In 2024, King County and Snohomish County had rental rates of $1.17 per square foot and $1.07 per square foot, respectively, the highest rental rates for warehousing space compared to competitive counties and the state. Warehousing rental rates in Lewis County fluctuated from the highest at $1.37 per square foot in 2021 to the second lowest at $0.38 per square foot in 2024. This trend follows the influx of recently developed industrial buildings to the warehousing inventory in Lewis County.

Figure 3-14. Rental Rates for Warehouse Space



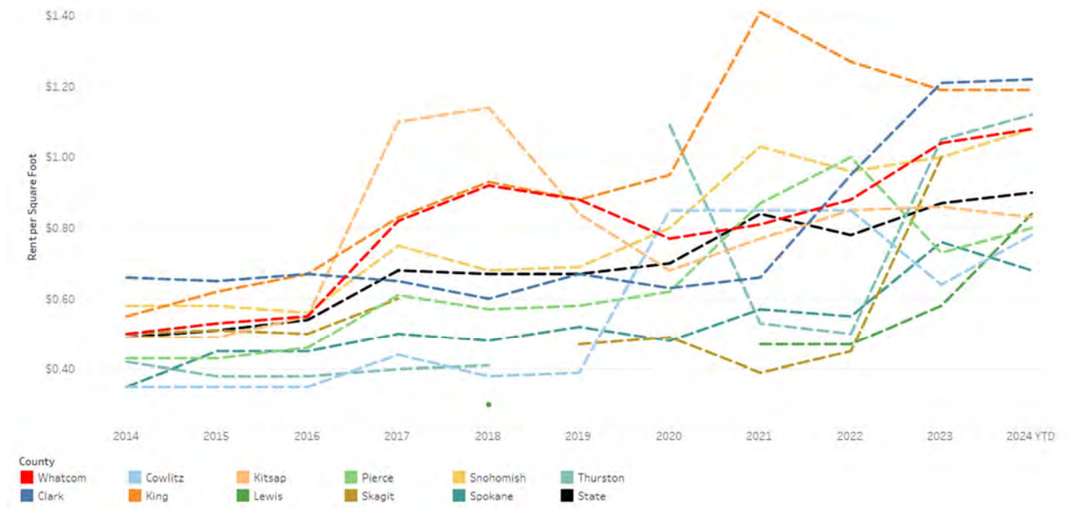
Source:
CoStar. 2024.

Notes
YTD= year to date
Data on Skagit County rental rates for industrial uses other than warehousing was missing for 2023 and 2024 YTD because there was not any space for lease.

Rental Rates for Industrial Use Other Than Warehousing

County vacancy rates for industrial uses, excluding warehousing uses, trended higher than in the state between 2014 and 2024. By December of 2024 only Whatcom County ($1.12 per square foot), King County ($1.19 per square foot), and Clark County ($1.22 per square foot) had higher rental rates for non-warehousing industrial buildings than the county ($1.08 per square foot). Spokane County had a rental rate of $0.68 per square foot in 2024, the lowest rental rate for industrial buildings (excluding warehouses) when compared to competitive counties.

Figure 3-15. Rental Rates for Other Industrial Uses



Source:
CoStar. 2024.
YTD= year to date

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Limitations

The services undertaken in completing this report were performed consistent with generally accepted professional consulting principles and practices. No other warranty, express or implied, is made. These services were performed consistent with our agreement with our client. This report is solely for the use and information of our client unless otherwise noted. Any reliance on this report by a third party is at such party's sole risk.

Opinions and recommendations contained in this report apply to conditions existing when services were performed and are intended only for the client, purposes, locations, time frames, and project parameters indicated. We are not responsible for the impacts of any changes in environmental standards, practices, or regulations subsequent to performance of services. We do not warrant the accuracy of information supplied by others, or the use of segregated portions of this report.

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Appendix C

Industrially Zoned Land Uses by Jurisdiction

Industrial Land Use

–Allowed Uses Crosswalk–

Land Use		City of Bellingham	City of Blaine	City of Ferndale	City of Lynden	City of Sumas	City of Everson	City of Nooksak	Whatcom County
		Heavy Industrial | Permitted Light Industrial | Permitted Marine Industrial | Permitted Planned Commercial | Conditional Planned Industrial | Permitted	AO | Other | Permitted CB – W | Mixed Use | Conditional GW | Commercial | Conditional HC | Commercial | Conditional M | Industrial | Permitted MPR | Other | Conditional	GB | Commercial | Conditional LI | Industrial | Conditional M | Industrial | Permitted	CSL | Commercial | Conditional CSR | Commercial | Conditional IBZ | Industrial | Conditional ID | Industrial | Permitted Medical services Overlay | Conditional	I | Industrial | Permitted MW | Commercial | Conditional	C | Commercial | Conditional R | Residential | Conditional LI | Industrial | Permitted	CD | Commercial | Conditional CM | Commercial | Conditional LI | Industrial | Permitted	AO | Industrial | Conditional CP | Industrial | Conditional GM | Industrial | Permitted HII | Industrial | Permitted LII | Industrial | Permitted PUD | Mixed Use | Permitted RF | Other | Conditional RGC | Other | Conditional RIM | Industrial | Permitted STC | Commercial | Conditional WRP | Other | Conditional
Land Use Descriptions	**Industrial Sector Category**								
Beverage bottling	Food Processing	Permitted in Industrial Transition	Unspecified	Unspecified	Unspecified	Unspecified	Unspecified	Permitted in Light Industrial district	Permitted in Light Impact Industrial, Heavy Impact
Dairy product processing	Food Processing	Permitted in Planned Commercial/Industrial zones	Conditional in Gateway district	Unspecified	Unspecified	Unspecified	Unspecified	Permitted in Light Industrial district	Unspecified
Distilled alcohol	Food Processing	Permitted in Light Industrial	Unspecified	Unspecified	Prohibited in Industrial District and Industrial Business zone	Conditional in Industrial district	Conditional in Light Industrial zone	Conditional in Light Industrial district	Unspecified
Fertilizer, garbage, offal, bones, and the reduction of dead animals.	Food Processing	Permitted in Light, Heavy Industrial	Unspecified	Unspecified	Unspecified	Unspecified	Unspecified	Unspecified	Unspecified
Food processing	Food Processing	Permitted in Planned Commercial/Industrial zones	Conditional in Gateway district	Permitted in General Business, Light Industrial, Manufacturing zone	Mixed: • Permitted in Industrial District • Conditional in Industrial Business zone	Permitted in Industrial district	Mixed: • Permitted in Light Industrial zone • Conditional in Commercial zone	Permitted in Light Industrial district	Permitted in General Manufacturing District, Heavy Impact Industrial, Light Impact Industrial district
Grain milling	Food Processing	Conditional in Heavy Industrial zones	Unspecified	Unspecified	Unspecified	Permitted in Industrial district	Unspecified	Unspecified	Unspecified
Ice manufacturing and cold storage	Food Processing	Unspecified, neighter uses listed in the code	Unspecified	Unspecified	Unspecified	Permitted in Industrial district	Unspecified	Mixed: • Permitted in Light Industrial district • Conditional in Commercial district	Unspecified
Packinghouse/Slaughterhouse	Food Processing	Permitted in Light, Heavy Industrial	Unspecified	Unspecified	Unspecified	Prohibited in Industrial district	Prohibited in Light industrial zone	Unspecified	Conditional in Rural Industrial and Manufacturing district
Tannery and curing of raw hides.	Food Processing	Permitted in Light Industrial	Unspecified	Unspecified	Unspecified	Unspecified	Unspecified	Unspecified	Unspecified
Marine port facilities	Maritime Industrial	Mixed: • Permitted in all Fairhaven Urban Village Industrial zones,, Waterfront Industrial Mixed-Use, Marine Industrial • Prohibited in Waterfront Commercial	Unspecified	Unspecified	Unspecified	Unspecified	Unspecified	Unspecified	Permitted in Heavy Impact Industrial district
Marine related industrial uses	Maritime Industrial	Mixed: • Permitted in all Fairhaven Urban Village Industrial zones,Waterfront Industrial Mixed-Use, Marine Industrial • Prohibited in Waterfront Commercial Mixed-Use	Conditional in Marine Planned Recreation district, Wharf Zoning district	Permitted in Manufacturing, Light Industrial zone	Unspecified	Permitted in Industrial district	Permitted in Light Industrial zone	Unspecified	Permitted in General Manufacturing District, Heavy Impact Industrial, Light Impact Industrial district
Transportation equipment including boat building; and bicycle and motorcycles, and related parts	Maritime Industrial	Permitted in Light and Heavy Industrial	Conditional in Gateway district	Unspecified	Unspecified	Unspecified	Unspecified	Unspecified	Permitted in Heavy Impact Industrial district
Combustible fuel	Energy	Permitted in Heavy Industrial	Unspecified	Unspecified	Unspecified	Conditional in Industrial district	Unspecified	Unspecified	Unspecified

Industrial Land Use

–Allowed Uses Crosswalk–

Land Use		City of Bellingham	City of Blaine	City of Ferndale	City of Lynden	City of Sumas	City of Everson	City of Nooksak	Whatcom County
		Heavy Industrial | Permitted Light Industrial | Permitted Marine Industrial | Permitted Planned Commercial | Conditional Planned Industrial | Permitted	AO | Other | Permitted CB – W | Mixed Use | Conditional GW | Commercial | Conditional HC | Commercial | Conditional M | Industrial | Permitted MPR | Other | Conditional	GB | Commercial | Conditional LI | Industrial | Conditional M | Industrial | Permitted	CSL | Commercial | Conditional CSR | Commercial | Conditional IBZ | Industrial | Conditional ID | Industrial | Permitted Medical services Overlay | Conditional	I | Industrial | Permitted MW | Commercial | Conditional	C | Commercial | Conditional R | Residential | Conditional LI | Industrial | Permitted	CD | Commercial | Conditional CM | Commercial | Conditional LI | Industrial | Permitted	AO | Industrial | Conditional CP | Industrial | Conditional GM | Industrial | Permitted HII | Industrial | Permitted LII | Industrial | Permitted PUD | Mixed Use | Permitted RF | Other | Conditional RGC | Other | Conditional RIM | Industrial | Permitted STC | Commercial | Conditional WRP | Other | Conditional
Land Use Descriptions	**Industrial Sector Category**								
Existing fossil fuel refineries, existing fossil fuel transshipment facilities, renewable fuel refineries, renewable fuel transshipment facilities, piers and docks legally established as of August 8, 2021	Energy	Prohibited	Unspecified	Unspecified	Unspecified	Prohibited in Industrial District	Prohibited in Light industrial zone	Unspecified	Permitted in Heavy Impact Industrial district
Expansion of existing legal renewable fuel refineries or renewable fuel transshipment facilities	Energy	Conditional for existing refineries	Unspecified	Unspecified	Unspecified	Unspecified	Unspecified	Unspecified	Permitted in Heavy Impact Industrial district
General Chemicals processing facilities	Energy	Permitted in Light, Heavy Industrial	Conditional in Gateway district	Conditional in Manufacturing zone	Mixed: • Permitted in Industrial District zone • Conditional in Industrial Business Zone	Conditional in Industrial district	Conditional in Light Industrial zone	Conditional in Light Industrial district	Unspecified
Liquified petroleum storage	Energy	Permitted in Light Industrial	Unspecified	Unspecified	Permitted in both Industrial District, Industrial Business Zone	Unspecified	Prohibited in Light industrial zone	Unspecified	Unspecified
New fossil fuel refineries/transshipment facilities	Energy	Permitted in Heavy Industrial	Unspecified	Unspecified	Unspecified	Unspecified	Unspecified	Unspecified	Prohibited in Light Impact Industrial, Heavy Impact Industrial district
New renewable fuel refineries or renewable fuel transshipment facilities	Energy	Conditional in Heavy Industrial zones	Unspecified	Unspecified	Unspecified	Unspecified	Unspecified	Unspecified	Permitted in Heavy Impact Industrial district
Power plant	Energy	Mixed: • Permitted in Fairhaven Urban Village Industrial zone 3, Waterfront Industrial Mixed-Use, Industrial Transition • Prohibited in Fairhaven Urban Village Industrial zones 1&2, Waterfront Commercial Mixed-Use	Prohibited in Gateway district and otherwise unspecified	Conditional in Light Industrial, Manufacturing zone	Unspecified	Permitted in Industrial district	Conditional in Light Industrial zone	Conditional in Light Industrial district	Unspecified
Stationary thermal power plants with generating capacity of less than 250,000 kilowatts, floating thermal power plants with generating capacity of less than 50,000 kilowatts, and other power plants utilizing renewable resources from solar, wind (Chapter 20.14 WCC) or water sources, except that coal-fired power plants are not allowed	Energy	Unspecified	Unspecified	Unspecified	Unspecified	Unspecified	Unspecified	Unspecified	Permitted in Heavy Impact Industrial district
Utility and communication transmission facilities	Energy	Permitted in Light, Heavy Industrial, Industrial Transition	Unspecified	Unspecified	Mixed: • Conditional in Industrial Business Zone • Permitted in Industrial District	Permitted in Industrial district	Unspecified	Unspecified	Permitted in Light Impact Industrial, Heavy Impact Industrial district
Wood fired boilers	Energy	Unspecified	Unspecified	Unspecified	Unspecified	Conditional in Industrial district	Unspecified	Unspecified	Unspecified
Asphalt or tar;	Construction	Permitted in Light Industrial	Prohibited in Gateway district	Conditional in Manufacturing zone	Prohibited in Industrial District and Industrial Business zone	Conditional in Industrial district	Conditional in Light Industrial zone	Conditional in Light Industrial district	Unspecified
Brick, tile or terra cotta	Construction	Permitted in Light Industrial	Unspecified	Unspecified	Unspecified	Conditional in Industrial district	Conditional in Light Industrial zone	Conditional in Light Industrial district	Unspecified
Concrete, cement, lime, gypsum or plaster of Paris	Construction	Permitted in Light Industrial	Prohibited in Gateway district and otherwise unspecified	Permitted in Light Industrial zone	Prohibited in Industrial District and Industrial Business zone	Conditional in Industrial district	Conditional in Light Industrial zone	Conditional in Light Industrial district	Conditional in Rural Industrial and Manufacturing district
Contractor storage yards	Construction	Permitted in Light, Heavy Industrial, Industrial Transition	Unspecified	Permitted in General Business, Light Industrial zone	Permitted in Industrial District and Industrial Business zone	Permitted in Industrial district	Permitted in Light Industrial zone	Mixed: • Conditional in Central Market district • Permitted in Heavy Impact Industrial, Light Impact Industrial district	Permitted in Heavy Impact Industrial, Light Impact Industrial, Rural Industrial and Manufacturing district
Gravel crushing or sorting	Construction	Conditional in the Industrial Planned zones	Unspecified	Conditional in Manufacturing zone	Unspecified	Unspecified	Unspecified	Unspecified	Unspecified
Heavy construction contractors	Construction	Permitted in Light, Heavy Industrial , Industrial Transition	Unspecified	Unspecified	Unspecified	Unspecified	Unspecified	Unspecified	Permitted in Heavy Impact Industrial district

Industrial Land Use

–Allowed Uses Crosswalk–

Land Use		City of Bellingham	City of Blaine	City of Ferndale	City of Lynden	City of Sumas	City of Everson	City of Nooksak	Whatcom County
		Heavy Industrial | Permitted Light Industrial | Permitted Marine Industrial | Permitted Planned Commercial | Conditional Planned Industrial | Permitted	AO | Other | Permitted CB – W | Mixed Use | Conditional GW | Commercial | Conditional HC | Commercial | Conditional M | Industrial | Permitted MPR | Other | Conditional	GB | Commercial | Conditional LI | Industrial | Conditional M | Industrial | Permitted	CSL | Commercial | Conditional CSR | Commercial | Conditional IBZ | Industrial | Conditional ID | Industrial | Permitted Medical services Overlay | Conditional	I | Industrial | Permitted MW | Commercial | Conditional	C | Commercial | Conditional R | Residential | Conditional LI | Industrial | Permitted	CD | Commercial | Conditional CM | Commercial | Conditional LI | Industrial | Permitted	AO | Industrial | Conditional CP | Industrial | Conditional GM | Industrial | Permitted HII | Industrial | Permitted LII | Industrial | Permitted PUD | Mixed Use | Permitted RF | Other | Conditional RGC | Other | Conditional RIM | Industrial | Permitted STC | Commercial | Conditional WRP | Other | Conditional
Land Use Descriptions	**Industrial Sector Category**								
Sand or gravel	Construction	Conditional in Heavy Industrial zones	Unspecified	Conditional in Manufacturing zone	Unspecified	Prohibited in Industrial district	Unspecified	Unspecified	Conditional in Heavy Impact Industrial, Light Impact Industrial district
Manufacture of The fabrication of apparel, textile products, furniture and fixtures, leather products, stone products, glass products, electric equipment, communications equipment	Recreational Goods	Permitted in Planned Commercial/Industrial zones, all Fairhaven Urban Village Industrial zones	Conditional in Gateway district	Permitted in Manufacturing zone	Unspecified	Permitted in Industrial district	Unspecified	Permitted in Light Industrial district	Permitted in General Manufacturing district, Heavy Impact Industrial, Light Impact Industrial, Rural Industrial and Manufacturing district
Manufacture of transportation equipment including boat building; and bicycle and motorcycles, and related parts	Recreational Goods	Permitted in Planned Commercial/Industrial zones	Unspecified	Unspecified	Unspecified	Conditional in Industrial district	Permitted in Light Industrial zone	Unspecified	Permitted in General Manufacturing, Heavy Impact Industrial district
The manufacturing and fabrication of jewelry, silverware, plated ware, metal fabrication, musical instruments and parts, toys, sports and athletic goods, and miscellaneous related activities	Recreational Goods	Permitted in Light Industrial	Conditional in Gateway district	Permitted in Manufacturing zone	Unspecified	Permitted in Industrial district	Unspecified	Permitted in Light Industrial district	Permitted in General Manufacturing, Light Impact Industrial, Heavy Impact Industrial, Rural Industrial and Manufacturing district
Acetylene	Supportive Manufacturing	Permitted in Light Industrial	Unspecified	Unspecified	Prohibited in Industrial District and Industrial Business zone	Conditional in Industrial district	Conditional in Light Industrial zone	Conditional in Light Industrial district	Unspecified
Forging/smelting of metal	Supportive Manufacturing	Permitted in Light Industrial	Prohibited in Gateway district and otherwise unspecified	Unspecified	Prohibited in Industrial District and Industrial Business zone	Conditional in Industrial district	Conditional in Light Industrial zone	Conditional in Light Industrial district	Unspecified
Heavy equipment repair	Supportive Manufacturing	Permitted in all Fairhaven Urban Village Industrial zones, Heavy Industrial, Industrial Transition	Unspecified	Unspecified	Unspecified	Permitted in Industrial district	Permitted in Light Industrial zone	Unspecified	Permitted in Light Impact Industrial district
Light manufacturing and fabrication	Supportive Manufacturing	Mixed: • Permitted in all Fairhaven Urban Village Industrial zones, Waterfront Industrial Mixed-Use, Light, Heavy Industrial, Industrial Transition • Conditional in Waterfront Commercial Mixed-Use	Mixed: • Permitted in Manufacturing district • Conditional in Gateway district	Permitted in General Business, Light Industrial zone	Permitted in Industrial District, Industrial Business zone	Permitted in Industrial district	Permitted in Light Industrial zone	Unspecified	Unspecified
Machine shops and workshops	Supportive Manufacturing	Permitted in light industiral and planned industrial zones	Conditional in Gateway district	Permitted in Light Industrial zone	Unspecified	Permitted in Industrial district	Permitted in Light Industrial zone	Mixed: • Permitted in Light Industrial district • Conditional in Central Market district	Unspecified
Manufacture of machinery including engines; turbines; farm machinery and equipment; construction, mining and materials handling equipment; machine tools and dies; and special and general industrial equipment.	Supportive Manufacturing	Permitted in light industiral and planned industrial zones	Conditional in Gateway district	Unspecified	Unspecified	Unspecified	Unspecified	Unspecified	Permitted in Heavy Impact Industrial district
The fabrication of metal products including metal cans, hardware, hand tools, cutlery, heating apparatus, plumbing fixtures, structural metal and stamping.	Supportive Manufacturing	Permitted in light industiral and planned industrial zones	Unspecified	Unspecified	Unspecified	Unspecified	Unspecified	Unspecified	Permitted in Heavy Impact Industrial, Light Impact Industrial, Rural Industrial and Manufacturing district
The manufacture of electrical machinery including transmission and distribution equipment, and industrial apparatus	Supportive Manufacturing	Permitted in Planned Commercial/Industrial zones	Conditional in Gateway district	Unspecified	Unspecified	Unspecified	Unspecified	Unspecified	Permitted in Heavy Impact Industrial district
Contractor supply	Transportation and warehousing	Unspecified	Unspecified	Unspecified	Permitted in both Industrial District, Industrial Business Zone	Unspecified	Unspecified	Unspecified	Unspecified
Freight Terminals	Transportation and warehousing	Permitted in Light, Heavy Industrial	Unspecified	Unspecified	Unspecified	Permitted in Industrial district	Permitted in Light Industrial zone	Permitted in Light Industrial district	Permitted in General Manufacturing, Light Impact Industrial, Heavy Impact Industrial, Rural Industrial and Manufacturing district

Industrial Land Use

–Allowed Uses Crosswalk–

Land Use		City of Bellingham	City of Blaine	City of Ferndale	City of Lynden	City of Sumas	City of Everson	City of Nooksak	Whatcom County
		Heavy Industrial | Permitted Light Industrial | Permitted Marine Industrial | Permitted Planned Commercial | Conditional Planned Industrial | Permitted	AO | Other | Permitted CB – W | Mixed Use | Conditional GW | Commercial | Conditional HC | Commercial | Conditional M | Industrial | Permitted MPR | Other | Conditional	GB | Commercial | Conditional LI | Industrial | Conditional M | Industrial | Permitted	CSL | Commercial | Conditional CSR | Commercial | Conditional IBZ | Industrial | Conditional ID | Industrial | Permitted Medical services Overlay | Conditional	I | Industrial | Permitted MW | Commercial | Conditional	C | Commercial | Conditional R | Residential | Conditional LI | Industrial | Permitted	CD | Commercial | Conditional CM | Commercial | Conditional LI | Industrial | Permitted	AO | Industrial | Conditional CP | Industrial | Conditional GM | Industrial | Permitted HII | Industrial | Permitted LII | Industrial | Permitted PUD | Mixed Use | Permitted RF | Other | Conditional RGC | Other | Conditional RIM | Industrial | Permitted STC | Commercial | Conditional WRP | Other | Conditional
Land Use Descriptions	**Industrial Sector Category**								
Trucking and warehousing	Transportation and warehousing	Mixed: • Permitted in Planned Commercial/Industrial zones, all Fairhaven Urban Village Industrial zones, Light, Heavy Industrial, Industrial Transition • Prohibited in Waterfront Commercial Mixed-Use	Mixed: • Permitted in Manufacturing district • Conditional in Gateway district	Permitted in Manufacturing, General Business, Light Industrial zone	Permitted in Industrial District and Industrial Business zone	Mixed: • Permitted in Industrial District • Conditional in Mini-Warehouse district	Mixed: • Permitted in Light Industrial zone • Conditional in Commercial zone	Conditional in Central Market district	Permitted in General Manufacturing District, Heavy Impact Industrial, Light Impact Industrial, Rural Industrial and Manufacturing district
Wholesale supply outlets	Transportation and warehousing	Unspecified	Unspecified	Mixed: •Permitted in General Business • •Conditional in Light Industrial, Manufacturing zone	Permitted in Industrial District, Industrial Business Zone	Unspecified	Permitted in Light Industrial zone	Unspecified	Permitted in Heavy Impact Industrial, Light Impact Industrial, Rural Industrial and Manufacturing district
Cabinet shops	Wood Products	Conditional in Old Town overlay district	Conditional in Gateway district	Unspecified	Unspecified	Unspecified	Unspecified	Permitted in Light Industrial district	Unspecified
Lumber and plaining mills	Wood Products	Permitted in Light Industrial	Prohibited in Gateway district and otherwise unspecified	Unspecified	Unspecified	Conditional in Industrial district	Conditional in Light Industrial zone	Conditional in Light Industrial district	Permitted in General Manufacturing , Heavy Impact Industrial, Rural Industrial and Manufacturing district
Lumber yards	Wood Products	Permitted in Planned Commercial/Industrial zones, Heavy Industrial	Conditional in Gateway district	Unspecified	Unspecified	Conditional in Industrial district	Permitted in Light Industrial zone	Mixed: • Conditional in Central Market, Commercial district • Permitted in Light Industrial district	Unspecified
Paper and pulp	Wood Products	Permitted in Light Industrial	Prohibited in Gateway district and otherwise unspecified	Unspecified	Prohibited in Industrial District and Industrial Business zone	Conditional in Industrial district	Conditional in Light Industrial zone	Conditional in Light Industrial district	Permitted in General Manufacturing District, Light Industrial, Heavy Impact
Wood drying kilns	Wood Products	Unspecified	Unspecified	Unspecified	Unspecified	Permitted in Industrial district	Unspecified	Unspecified	Unspecified
Wood Products	Wood Products	Permitted in Light Industrial	Conditional in Gateway district	Permitted in General Business, Light Industrial zone	Permitted in Industrial District, Industrial Business zone	Unspecified	Conditional in Commercial, Residential zones	Unspecified	Mixed: • Conditional in Rural Forestry district
Instruments, photographic goods, optical goods, watches and clocks, and including engineering, scientific, surgical, medical, dental and ophthalmic products	Other Industrial	Permitted in Planned Commercial/Industrial zones, all Fairhaven Urban Village Industrial zones	Conditional in Gateway district	Permitted in Manufacturing zone	Unspecified	Unspecified	Permitted in Light Industrial zone	Unspecified	Permitted in General Manufacturing District, Rural Industrial and Manufacturing district
Automobile and truck retail, wholesale, repair and storage businesses	Other Industrial	Mixed: • Permitted in Planned Commercial/Industrial zones, Fairhaven Urban Village Industrial zone 1, Waterfront Industrial Mixed-Use, Light, Heavy Industrial, Industrial Transition • Prohibited in Fairhaven Urban Village Industrial zones 2&3, Waterfront Commercial Mixed-Use	Unspecified	Unspecified	Permitted in Industrial District and Industrial Business zone	Permitted in Industrial district	Permitted in Light Industrial zone	Permitted in Light Industrial district	Conditional in Rural Industrial and Manufacturing district
Commercial printing	Other Industrial	Permitted in Planned Commercial/Industrial zones	Conditional in Gateway district	Unspecified	Permitted in Industrial Business District	Unspecified	Unspecified	Unspecified	Permitted in General Manufacturing, Light Impact Industrial, Heavy Impact Industrial, Rural Industrial and Manufacturing district
Equipment rental and repair and other rental outlets	Other Industrial	Permitted in all Fairhaven Urban Village Industrial zones, Waterfront Industrial Mixed-Use, Waterfront Commercial Mixed-Use, Industrial Transition	Unspecified	Unspecified	Permitted in Industrial District, Industrial Business Zone	Unspecified	Permitted in Light Industrial zone	Permitted in Light Industrial district	Unspecified

Industrial Land Use

–Allowed Uses Crosswalk–

Land Use		City of Bellingham	City of Blaine	City of Ferndale	City of Lynden	City of Sumas	City of Everson	City of Nooksak	Whatcom County
		Heavy Industrial | Permitted Light Industrial | Permitted Marine Industrial | Permitted Planned Commercial | Conditional Planned Industrial | Permitted	AO | Other | Permitted CB – W | Mixed Use | Conditional GW | Commercial | Conditional HC | Commercial | Conditional M | Industrial | Permitted MPR | Other | Conditional	GB | Commercial | Conditional LI | Industrial | Conditional M | Industrial | Permitted	CSL | Commercial | Conditional CSR | Commercial | Conditional IBZ | Industrial | Conditional ID | Industrial | Permitted Medical services Overlay | Conditional	I | Industrial | Permitted MW | Commercial | Conditional	C | Commercial | Conditional R | Residential | Conditional LI | Industrial | Permitted	CD | Commercial | Conditional CM | Commercial | Conditional LI | Industrial | Permitted	AO | Industrial | Conditional CP | Industrial | Conditional GM | Industrial | Permitted HII | Industrial | Permitted LII | Industrial | Permitted PUD | Mixed Use | Permitted RF | Other | Conditional RGC | Other | Conditional RIM | Industrial | Permitted STC | Commercial | Conditional WRP | Other | Conditional
Land Use Descriptions	**Industrial Sector Category**								
Explosives	Other Industrial	Permitted in Light, Heavy Industrial	Unspecified	Unspecified	Prohibited in Industrial District and Industrial Business zone	Prohibited in Industrial district	Prohibited in Light industrial zone	Unspecified	Unspecified
Fats oils and soaps	Other Industrial	Permitted in Light Industrial	Prohibited in Gateway district and otherwise unspecified	Permitted in Light Industrial zone	Prohibited in Industrial District and Industrial Business zone	Conditional in Industrial district	Conditional in Light Industrial zone	Conditional in Light Industrial district	Unspecified
Industrial parks	Other Industrial	Unspecified	Unspecified	Unspecified	Mixed: • Permitted in Industrial District Zone • Conditional in Industrial Business Zone	Unspecified	Unspecified	Unspecified	Unspecified
Manufacture of rubber and plastic	Other Industrial	Permitted in light industrial and some urban villages	Unspecified	Unspecified	Unspecified	Unspecified	Unspecified	Unspecified	Permitted in Heavy Impact Industrial, Light Impact Industrial, Rural Industrial and Manufacturing district
Moving and storage companies	Other Industrial	Unspecified	Unspecified	Unspecified	Unspecified	Unspecified	Unspecified	Unspecified	Unspecified
Oilcloth, linoleum or vinyl;	Other Industrial	Permitted in Light Industrial	Prohibited in Gateway district and otherwise unspecified	Unspecified	Prohibited in Industrial District and Industrial Business zone	Conditional in Industrial district	Conditional in Light Industrial zone	Conditional in Light Industrial district	Unspecified
Paint, shellac, turpentine, lacquer or varnish	Other Industrial	Permitted in Light Industrial	Prohibited in Gateway district and otherwise unspecified	Unspecified	Prohibited in Industrial District and Industrial Business zone	Conditional in Industrial district	Conditional in Light Industrial zone	Conditional in Light Industrial district	Unspecified
Processing and packaging of drugs, pharmaceuticals and cosmetics	Other Industrial	Prohibited in all Fairhaven Urban Village Industrial zones	Conditional in Gateway district	Unspecified	Unspecified	Unspecified	Unspecified	Unspecified	Permitted in General Manufacturing, Light Impact Industrial, Heavy Impact Industrial, Rural Industrial and Manufacturing district
Recycling Center	Other Industrial	Mixed: • Prohibited in Fairhaven Urban Village Industrial zones 1 • Permitted in Fairhaven Urban Village Industrial zone 2&3, Waterfront Industrial Mixed-Use, Light, Heavy Industrial, Industrial Transition •Conditional in Waterfront Commercial Mixed-Use	Prohibited in Gateway district and otherwise unspecified	Conditional in Light Industrial zone	Conditional in Industrial District, Industrial Business Zone	Conditional in Industrial district	Conditional in Light Industrial zone	Conditional in Light Industrial district	Unspecified
Research and Development	Other Industrial	Permitted in Planned Commercial/Industrial zones	Permitted in Manufacturing district	Permitted in Light Industrial zone	Permitted in Industrial Business zone	Permitted in Industrial district	Permitted in Light Industrial zone	Permitted in Light Industrial district	Unspecified
Salvage yard	Other Industrial	Unspecified	Prohibited in Gateway district and otherwise unspecified	Conditional in Light Industrial zone	Unspecified	Unspecified	Unspecified	Unspecified	Unspecified
Small manufactured goods to be sold on the premises	Other Industrial	Permitted in Planned Commercial/Industrial zones	Conditional in Highway Commercial district	Unspecified	Mixed: • Conditional in Local Commercial Services, Regional Commercial Service zone • Permitted in Industrial district	Permitted in Industrial district	Conditional in Commercial, Residential zones	Unspecified	Conditional in Rural General Commercial, General Manufacturing, Small Town Commercial district
Solid waste facilities	Other Industrial	Permitted in Planned Commercial/Industrial zones	Prohibited in Gateway district and otherwise unspecified	Unspecified	Unspecified	Unspecified	Unspecified	Unspecified	Permitted in Heavy Impact Industrial, Light Impact Industrial, Rural Industrial and Manufacturing district
The manufacturing and fabrication of modular housing, mobile homes, recreational vehicles and similar products	Other Industrial	Unspecified	Unspecified	Unspecified	Unspecified	Unspecified	Permitted in Light Industrial zone	Permitted in Light Industrial district	Permitted in General Manufacturing district
Wholesale or retail sales and repair of industrial, automotive, farm equipment and/or supplies	Other Industrial	Permitted in Planned Commercial/Industrial zones, Heavy Industrial	Unspecified	Unspecified	Permitted in both Industrial District and Industrial Business zone	Conditional in Industrial district	Permitted in Light Industrial zone	Permitted in Light Industrial district	Permitted in Light Impact Industrial, Rural Industrial and Manufacturing district
Wood waste recycling	Other Industrial	Unspecified	Unspecified	Unspecified	Unspecified	Unspecified	Unspecified	Unspecified	Permitted in Rural Industrial and Manufacturing district
Wreck yards	Other Industrial	Mixed: •Permitted in Light Industrial •Prohibited in all Fairhaven Urban Village Industrial zones, Waterfront Industrial Mixed-Use, Waterfront Commercial Mixed-Use, Industrial Transition	Prohibited in Gateway district and otherwise unspecified	Conditional in Light Industrial, Manufacturing zone	Prohibited in Industrial District and Industrial Business zone	Unspecified	Unspecified	Unspecified	Conditional in General Manufacturing

Industrial Land Use

–Allowed Uses Crosswalk–

Land Use		City of Bellingham	City of Blaine	City of Ferndale	City of Lynden	City of Sumas	City of Everson	City of Nooksak	Whatcom County
		Heavy Industrial | Permitted Light Industrial | Permitted Marine Industrial | Permitted Planned Commercial | Conditional Planned Industrial | Permitted	AO | Other | Permitted CB – W | Mixed Use | Conditional GW | Commercial | Conditional HC | Commercial | Conditional M | Industrial | Permitted MPR | Other | Conditional	GB | Commercial | Conditional LI | Industrial | Conditional M | Industrial | Permitted	CSL | Commercial | Conditional CSR | Commercial | Conditional IBZ | Industrial | Conditional ID | Industrial | Permitted Medical services Overlay | Conditional	I | Industrial | Permitted MW | Commercial | Conditional	C | Commercial | Conditional R | Residential | Conditional LI | Industrial | Permitted	CD | Commercial | Conditional CM | Commercial | Conditional LI | Industrial | Permitted	AO | Industrial | Conditional CP | Industrial | Conditional GM | Industrial | Permitted HII | Industrial | Permitted LII | Industrial | Permitted PUD | Mixed Use | Permitted RF | Other | Conditional RGC | Other | Conditional RIM | Industrial | Permitted STC | Commercial | Conditional WRP | Other | Conditional
Land Use Descriptions	**Industrial Sector Category**								
Non-Industrial Uses in Industrial Zones									
Mini-storage facilities	Not Industrial	Mixed: •Permitted in Industrial Transition •Prohibited in all Fairhaven Urban Village Industrial zones	Unspecified	Unspecified	Mixed: • Permitted in Industrial Business zone • Conditional in Industrial District	Permitted in Industrial district	Permitted in Light Industrial zone	Conditional in Central Market district	Unspecified
Business firm headquarters and professional offices	Not Industrial	Permitted in Planned Commercial/Industrial zones, Light Industrial	Unspecified	Permitted in General Business, Light Industrial, Manufacturing zone	Mixed: • Permitted in Industrial Business zone • Conditional in Industrial District	Permitted in Industrial district	Permitted in Light Industrial zone	Unspecified	Permitted in Heavy Impact Industrial, Light Impact Industrial district
Commercial plant nurseries and greenhouses	Not Industrial	Permitted in Planned Commercial/Industrial zones, Light Industrial	Unspecified	Unspecified	Mixed: • Permitted in Industrial Business Zone • Prohibited in Industrial District	Permitted in Industrial district	Permitted in Light Industrial zone	Unspecified	Permitted in Rural Industrial and Manufacturing district
Medical Campus	Not Industrial	Permitted in Planned Commercial/Industrial zones	Unspecified	Conditional in Medical Services Overlay	Permitted in Industrial Business Zone	Unspecified	Unspecified	Unspecified	Unspecified
Work/live units	Not Industrial	Prohibited	Conditional in Manufacturing district	Unspecified	Unspecified	Conditional in Industrial district	Unspecified	Unspecified	
Restaurants	Not Industrial	Mixed: •Permitted in Planned Commercial/Industrial zones, Waterfront Commercial Mixed-Use, Light, Heavy Industrial, Marine Industrial, Industrial Transition • Conditional in all Fairhaven Urban Village Industrial zones, Waterfront Industrial Mixed-Use	Conditional in Manufacturing district	Unspecified	Unspecified	Unspecified	Unspecified	Unspecified	Permitted in General Manufacturing, Light Impact Industrial, Rural Industrial and Manufacturing district
Overnight Accommodations	Not Industrial	Prohibited	Conditional in Manufacturing district	Unspecified	Unspecified	Unspecified	Unspecified	Unspecified	Unspecified
RV Parks	Not Industrial	Prohibited in all Fairhaven Urban Village Industrial zones, Waterfront Industrial Mixed-Use, Waterfront Commercial Mixed-Use, Industrial Transition	Conditional in Manufacturing district	Unspecified	Unspecified	Unspecified	Unspecified	Unspecified	Unspecified
Testing Laboratory	Not Industrial	Mixed: • Permitted in Planned Commercial/Industrial zones, Fairhaven Urban Village Industrial zone 1, Waterfront Commercial Mixed-Use, Light Industrial, Industrial Transition • Prohibited in Fairhaven Urban Village Industrial zones 2 & 3, Waterfront Industrial Mixed-Use	Unspecified	Permitted in Light Industrial zone	Mixed: • Permitted in Industrial Business Zone • Prohibited in Industrial District	Permitted in Industrial district	Permitted in Light Industrial zone	Permitted in Light Industrial district	Unspecified
Moving and Storage Companies	Not Industrial	Unspecified	Unspecified	Permitted in Light Industrial zone	Unspecified	Unspecified	Permitted in Light Industrial zone	Conditional in Light Industrial district	Unspecified
Coffee/Food stand	Not Industrial	Permitted in Light, Heavy Industrial, Marine Industrial	Unspecified	Permitted in Light Industrial, Manufacturing zone	Mixed: • Permitted in Industrial Business Zone • Prohibited in Industrial District	Unspecified	Permitted in Light Industrial zone	Unspecified	Permitted in General Manufacturing, Light Impact Industrial district
Daycare Center	Not Industrial	Mixed: •Permitted in Waterfront Commercial Mixed-Use •Conditional in all Fairhaven Urban Village Industrial zones •Prohibited in Industrial Mixed-Use, Industrial Transition	Unspecified	Permitted in Light Industrial zone	Unspecified	Unspecified	Unspecified	Unspecified	Permitted in General Manufacturing, Heavy Impact Industrial, Light Impact Industrial, Rural Industrial and Manufacturing district

Industrial Land Use

–Allowed Uses Crosswalk–

Land Use		City of Bellingham	City of Blaine	City of Ferndale	City of Lynden	City of Sumas	City of Everson	City of Nooksak	Whatcom County
		Heavy Industrial | Permitted Light Industrial | Permitted Marine Industrial | Permitted Planned Commercial | Conditional Planned Industrial | Permitted	AO | Other | Permitted CB – W | Mixed Use | Conditional GW | Commercial | Conditional HC | Commercial | Conditional M | Industrial | Permitted MPR | Other | Conditional	GB | Commercial | Conditional LI | Industrial | Conditional M | Industrial | Permitted	CSL | Commercial | Conditional CSR | Commercial | Conditional IBZ | Industrial | Conditional ID | Industrial | Permitted Medical services Overlay | Conditional	I | Industrial | Permitted MW | Commercial | Conditional	C | Commercial | Conditional R | Residential | Conditional LI | Industrial | Permitted	CD | Commercial | Conditional CM | Commercial | Conditional LI | Industrial | Permitted	AO | Industrial | Conditional CP | Industrial | Conditional GM | Industrial | Permitted HII | Industrial | Permitted LII | Industrial | Permitted PUD | Mixed Use | Permitted RF | Other | Conditional RGC | Other | Conditional RIM | Industrial | Permitted STC | Commercial | Conditional WRP | Other | Conditional
Land Use Descriptions	**Industrial Sector Category**								
Agricultural and related activities	Not Industrial	Unspecified	Unspecified	Unspecified	Unspecified	Unspecified	Permitted in Light Industrial zone	Unspecified	Unspecified
Farm stands	Not Industrial	Unspecified	Unspecified	Unspecified	Unspecified	Unspecified	Permitted in Light Industrial zone	Unspecified	Unspecified
Agricultural education and business development centers	Not Industrial	Unspecified	Unspecified	Unspecified	Unspecified	Unspecified	Permitted in Light Industrial zone	Unspecified	Unspecified
Animal hospitals and kennels	Not Industrial	Mixed: •Permitted in Planned Commercial/Industrial zones, Light Industrial, Industrial Transition • Conditional in all Fairhaven Urban Village Industrial zones,Waterfront Commercial Mixed-Use, Waterfront Industrial Mixed-Use	Unspecified	Unspecified	Mixed: • Permitted in Industrial Business Zone • Prohibited in Industrial District	Permitted in Industrial district	Conditional in Light Industrial zone	Conditional in Light Industrial district	Permitted in Light Impact Industrial, Heavy Impact Industrial, Rural Industrial and Manufacturing district
Indoor shooting ranges	Not Industrial	Unspecified	Unspecified	Unspecified	Unspecified	Unspecified	Unspecified	Conditional in Light Industrial district	Unspecified
Mushroom composting or production or processing of mushroom substrate	Not Industrial	Unspecified	Unspecified	Unspecified	Unspecified	Unspecified	Prohibited in Light Industrial	Unspecified	Permitted in Rural Industrial and Manufacturing district
Commercial composting	Not Industrial	Unspecified	Unspecified	Unspecified	Unspecified	Unspecified	Prohibited in Light Industrial	Unspecified	Unspecified
Emergency services, such as police, fire and ambulance	Not Industrial	Permittted	Prohibited in Gateway district and otherwise unspecified	Permitted in Light Industrial, Manufacturing zone	Unspecified	Unspecified	Unspecified	Unspecified	Unspecified
Municipal and public uses	Not Industrial	Mixed: •Permitted in Planned Commercial/Industrial zones, all	Unspecified	Permitted in Manufacturing, Light Industrial zone	Unspecified	Unspecified	Permitted in Light Industrial zone	Permitted in Light Industrial, Commercial district	Permitted in General Manufacturing, Light Impact Industrial district, Heavy Impact
Church	Not Industrial	Conditional in Light, Heavy, and Marine Industrial, Industrial Transition	Unspecified	Conditional in Light Industrial, Manufacturing zone	Unspecified	Unspecified	Unspecified	Unspecified	Permitted in Light Impact Industrial district
Electric vehicle battery charging stations	Not Industrial	Unspecified	Permitted in Manufacturing district	Unspecified	Unspecified	Unspecified	Permitted in Light Industrial zone	Permitted in Light Industrial district	Conditional in General Manufacturing, Heavy Impact Industrial, Light Impact Industrial district
Sale of general consumer goods	Not Industrial	Unspecified	Unspecified	Unspecified	Prohibited in Industrial District and Industrial Business zone	Unspecified	Unspecified	Conditional in Light Industrial district	Unspecified
Schools	Not Industrial	Conditional in Light, Heavy, and Marine Industrial, Industrial Transition	Unspecified	Unspecified	Prohibited in Industrial District and Industrial Business zone	Unspecified	Unspecified	Unspecified	Unspecified
Vocational Schools	Not Industrial	Permitted	Unspecified	Unspecified	Prohibited in Industrial District and Industrial Business zone	Unspecified	Unspecified	Unspecified	Unspecified
Radio or TV Stations	Not Industrial	Permitted	Unspecified	Unspecified	Mixed: • Permitted in Industrial Business Zone • Prohibited in Industrial District	Unspecified	Unspecified	Unspecified	Permitted in Heavy Impact Industrial, Light Impact Industrial, Rural Industrial and Manufacturing district
Appliance sales and services	Not Industrial	Unspecified	Unspecified	Unspecified	Mixed: • Permitted in Industrial Business Zone • Prohibited in Industrial District	Unspecified	Unspecified	Unspecified	Unspecified
RV sales and service	Not Industrial	Unspecified	Unspecified	Unspecified	Mixed: • Permitted in Industrial Business Zone • Prohibited in Industrial District	Unspecified	Unspecified	Unspecified	Unspecified
Postal services	Not Industrial	Permitted	Unspecified	Unspecified	Mixed: • Permitted in Industrial Business Zone • Prohibited in Industrial District	Unspecified	Unspecified	Unspecified	Unspecified

Industrial Land Use

–Allowed Uses Crosswalk–

Land Use		City of Bellingham	City of Blaine	City of Ferndale	City of Lynden	City of Sumas	City of Everson	City of Nooksak	Whatcom County
		Heavy Industrial | Permitted Light Industrial | Permitted Marine Industrial | Permitted Planned Commercial | Conditional Planned Industrial | Permitted	AO | Other | Permitted CB – W | Mixed Use | Conditional GW | Commercial | Conditional HC | Commercial | Conditional M | Industrial | Permitted MPR | Other | Conditional	GB | Commercial | Conditional LI | Industrial | Conditional M | Industrial | Permitted	CSL | Commercial | Conditional CSR | Commercial | Conditional IBZ | Industrial | Conditional ID | Industrial | Permitted Medical services Overlay | Conditional	I | Industrial | Permitted MW | Commercial | Conditional	C | Commercial | Conditional R | Residential | Conditional LI | Industrial | Permitted	CD | Commercial | Conditional CM | Commercial | Conditional LI | Industrial | Permitted	AO | Industrial | Conditional CP | Industrial | Conditional GM | Industrial | Permitted HII | Industrial | Permitted LII | Industrial | Permitted PUD | Mixed Use | Permitted RF | Other | Conditional RGC | Other | Conditional RIM | Industrial | Permitted STC | Commercial | Conditional WRP | Other | Conditional
Land Use Descriptions	**Industrial Sector Category**								
Offices	Not Industrial	Permitted in Planned Commercial/Industrial zones, Light Industrial, Industrial Transition	Unspecified	Unspecified	Unspecified	Permitted in Industrial district	Unspecified	Unspecified	Unspecified
Crematories	Not Industrial	Conditional	Unspecified	Unspecified	Unspecified	Conditional in Industrial district	Unspecified	Unspecified	Unspecified
Go-kart tracks	Not Industrial	Unspecified	Unspecified	Unspecified	Unspecified	Conditional in Industrial district	Unspecified	Unspecified	Unspecified
Cleaning and laundry agencies	Not Industrial	Permitted	Unspecified	Unspecified	Unspecified	Unspecified	Unspecified	Permitted in Light industrial district	Unspecified
Vehicle and tire repair shops	Not Industrial	Permitted in all Fairhaven Urban Village Industrial zones	Unspecified	Unspecified	Unspecified	Unspecified	Unspecified	Permitted in Light industrial district	Unspecified
Wireless communication facilities	Not Industrial	Conditional in Planned Commercial/Industrial zones, all Fairhaven Urban Village Industrial zones, Waterfront Industrial Mixed-Use, Waterfront Commercial Mixed-Use, Light, Heavy, and Marine Industrial, Industrial Transition	Unspecified	Unspecified	Unspecified	Unspecified	Unspecified	Conditional in Light Industrial district	Unspecified
Parks	Not Industrial	Prohibited	Unspecified	Unspecified	Unspecified	Unspecified	Unspecified	Unspecified	Conditional in General Manufacturing, Heavy Impact Industrial, Light Impact Industrial district
Golf Course	Not Industrial	Unspecified	Unspecified	Unspecified	Unspecified	Unspecified	Unspecified	Unspecified	Conditional in Heavy Impact Industrial, Light Impact Industrial district
Athletic Fields	Not Industrial	Unspecified	Unspecified	Unspecified	Unspecified	Unspecified	Unspecified	Unspecified	Conditional in General Manufacturing, Heavy Impact Industrial, Light Impact Industrial, Rural Industrial and Manufacturing district
Passenger intermodal terminals	Not Industrial	Permitted	Unspecified	Unspecified	Unspecified	Unspecified	Unspecified	Unspecified	Conditional in Heavy Impact Industrial, Light Impact Industrial, Rural Industrial and Manufacturing district
Mental health and substance abuse facilities	Not Industrial	Unspecified	Unspecified	Unspecified	Unspecified	Unspecified	Unspecified	Unspecified	Conditional in Heavy Impact Industrial, Light Impact Industrial district
Hardware Stores	Not Industrial	Permitted in Heavy Industrial	Unspecified	Unspecified	Unspecified	Unspecified	Unspecified	Unspecified	Unspecified

Survey of Zoning Districts Allowing Industrial Uses

City	Zoning Code	Zoning District	Ind Allowed	Note
Bellingham	C	Commercial	Not Allowed	General use is not industrial
Bellingham	C,Mi/P	Commercial, Mixed/Planned	Not Allowed	General use is not industrial
Bellingham	C,N	Commercial, Neighborhood	Not Allowed	General use is not industrial
Bellingham	C,N/P	Commercial, Neighborhood/Planned	Not Allowed	General use is not industrial
Bellingham	C, P	Commercial, Planned	Not Allowed	General use is not industrial
Bellingham	C,WF/P	Commercial, Planned/Waterfront	Not Allowed	General use is not industrial
Bellingham	C,WF	Commercial, Waterfront	Not Allowed	General use is not industrial
Bellingham	C/I,Mi/P	Commercial/Industrial, Mixed/Planned	Permitted	General use type includes industrial. Planned is the use qualifier meaning light industrial use qualifier
Bellingham	C/I,P	Commercial/Industrial, Planned	Permitted	General use type includes industrial. Planned is the use qualifier meaning light industrial use qualifier
Bellingham	C/I/RM,P	Commercial/Industrial/Residential Multi, Planned	Permitted	General use type includes industrial. Planned is the use qualifier meaning light industrial use qualifier
Bellingham	C/I/RM,P	Commercial/Industrial/Residential Multi, Planned	Permitted	General use type includes industrial. Planned is the use qualifier meaning light industrial use qualifier
Bellingham	UV_DT	Downtown District Urban Village (Other)	Not Allowed	Urban Village Land Use Area. Industrial not allowed in this area of the village.
Bellingham	UV_FH	Fairhaven Urban Village (Other)	Not Allowed	Urban Village Land Use Area. Industrial not allowed in this area of the village.
Bellingham	UV_FD	Fountain District Urban Village	Not Allowed	Urban Village Land Use Area. Industrial not allowed.
Bellingham	I-1	INDUSTRIAL AREA 1	Permitted	Urban Village Land Use Area (Fairhaven). Industrial allowed.
Bellingham	I-2	INDUSTRIAL AREA 2	Permitted	Urban Village Land Use Area (Fairhaven). Industrial allowed.
Bellingham	I-3	INDUSTRIAL AREA 3	Permitted	Urban Village Land Use Area (Fairhaven). Industrial allowed.
Bellingham	IND MIX-LP	INDUSTRIAL MIXED USE (LOG POND)	Permitted	Urban Village Land Use Area (Waterfront District). Industrial allowed.
Bellingham	IND MIX-LP	INDUSTRIAL MIXED USE (LOG POND)	Permitted	Urban Village Land Use Area (Waterfront District). Industrial allowed.
Bellingham	IND MIX-MT	INDUSTRIAL MIXED USE (MARINE TRADES)	Permitted	Urban Village Land Use Area (Waterfront District). Industrial allowed.
Bellingham	IND MIX-ST	INDUSTRIAL MIXED USE (SHIPPING TERMINAL)	Permitted	Urban Village Land Use Area (Waterfront District). Industrial allowed.
Bellingham	IH	Industrial, Heavy	Permitted	General use type includes industrial. Heavy Industrial
Bellingham	IH-Mi	Industrial, Heavy/Mixed	Permitted	NOT A ZONE, MH CONFIRMED General use type includes industrial. Heavy Industrial
Bellingham	IL	Industrial, Light	Permitted	General use type includes industrial. Light Industrial
Bellingham	IL-Mi	Industrial, Light/Mixed	Permitted	General use type includes industrial. Light Industrial
Bellingham	IL(P)	Industrial, Light/Planned	Permitted	General use type includes industrial. Planned is the use qualifier meaning light industrial use qualifier

Survey of Zoning Districts Allowing Industrial Uses

City	Zoning Code	Zoning District	Ind Allowed	Note
Bellingham	I(P)	Industrial, Planned	Permitted	General use type includes industrial. Planned is the use qualifier meaning light industrial use qualifier
Bellingham	I-RM(P)	Industrial/Residential Multi, Planned	Permitted	General use type includes industrial. Planned is the use qualifier meaning light industrial use qualifier
Bellingham	Inst	Institutional	Not Allowed	General use is not industrial
Bellingham	Inst(P)	Institutional, Planned	Not Allowed	General use is not industrial
Bellingham	Inst,WCC	Institutional, Whatcom Community College	Not Allowed	General use is not industrial
Bellingham	I-RM,M(P)	Institutional/Residential Multi, Mixed/Planned	Not Allowed	General use is not industrial
Bellingham	I-RM(P)	Institutional/Residential Multi, Planned	Not Allowed	General use is not industrial
Bellingham	IT	INDUSTRIAL TRANSITION	Permitted	Urban Village Land Use Area (Downtown District). Industrial allowed.
Bellingham	NC	NEIGHBORHOOD COMMERCIAL	Not Allowed	General use is not industrial
Bellingham	P,Cem	Public, Cemetery	Not Allowed	General use is not industrial
Bellingham	P,GS	Public, Governmental Services	Not Allowed	General use is not industrial
Bellingham	P,GS-Ho	Public, Governmental Services/Housing	Not Allowed	General use is not industrial
Bellingham	P,Ho	Public, Housing	Not Allowed	General use is not industrial
Bellingham	P,OS	Public, Open Space	Not Allowed	General use is not industrial
Bellingham	P,OS-Pk	Public, Open Space/Park	Not Allowed	General use is not industrial
Bellingham	P,OS-P-Rec	Public, Open Space/Park/Recreation	Not Allowed	General use is not industrial
Bellingham	P,OS-Pk-Sc	Public, Open Space/Park/School	Not Allowed	General use is not industrial
Bellingham	P,OS-Pk-Ut	Public, Open Space/Park/Utilities	Not Allowed	General use is not industrial
Bellingham	P,OS-Pk	Public, Open Space/Parks	Not Allowed	General use is not industrial
Bellingham	P,OS-Sc	Public, Open Space/School	Not Allowed	General use is not industrial
Bellingham	P,OS-Tr	Public, Open Space/Trail	Not Allowed	General use is not industrial
Bellingham	P,OS-Ut	Public, Open Space/Utilities	Not Allowed	General use is not industrial
Bellingham	P,Pk	Public, Park	Not Allowed	General use is not industrial
Bellingham	P,Pk-OS	Public, Park/Open Space	Not Allowed	General use is not industrial
Bellingham	P,Pk-Rec	Public, Park/Recreation	Not Allowed	General use is not industrial
Bellingham	P,Pk-Sc	Public, Park/School	Not Allowed	General use is not industrial
Bellingham	P,Pk-Tr	Public, Park/Trail	Not Allowed	General use is not industrial
Bellingham	P,Pk-Ut	Public, Park/Utilities	Not Allowed	General use is not industrial
Bellingham	P,Rec	Public, Recreation	Not Allowed	General use is not industrial
Bellingham	P,Rec-Sc	Public, Recreation/School	Not Allowed	General use is not industrial
Bellingham	P,Sc	Public, School	Not Allowed	General use is not industrial
Bellingham	P,Ut	Public, Utilities	Not Allowed	General use is not industrial
Bellingham	P-I	Public/Institutional	Not Allowed	General use is not industrial
Bellingham	RM,MI-M	Residential Multi, Mixed/Multiple	Not Allowed	General use is not industrial
Bellingham	RM,MI-M(P)	Residential Multi, Mixed/Multiple/Planned	Not Allowed	General use is not industrial

Survey of Zoning Districts Allowing Industrial Uses

City	Zoning Code	Zoning District	Ind Allowed	Note
Bellingham	RM,Mi(P)	Residential Multi, Mixed/Planned	Not Allowed	General use is not industrial
Bellingham	RM,M	Residential Multi, Multiple	Not Allowed	General use is not industrial
Bellingham	RM,M(P)	Residential Multi, Multiple/Planned	Not Allowed	General use is not industrial
Bellingham	RM(P)	Residential Multi, Planned	Not Allowed	General use is not industrial
Bellingham	RM(T)	Residential Multi, Transition	Not Allowed	General use is not industrial
Bellingham	RS	Residential Single	Not Allowed	General use is not industrial
Bellingham	RS,Mi(P)	Residential Single, Mixed/Planned	Not Allowed	General use is not industrial
Bellingham	RS(P)	Residential Single, Planned	Not Allowed	General use is not industrial
Bellingham	RS-RM(P)	Residential Single/Residential Multi, Planned	Not Allowed	General use is not industrial
Bellingham	UV_SW	Samish Way Urban Village	Not Allowed	Urban Village Land Use Area. Industrial not allowed.
Bellingham	UV_WF	Waterfront District Urban Village (Other)	Permitted	Urban Village Land Use Area. Industrial not allowed in MAJORITY this area of the village. Included as "Permitted" due to Port owned portion north of Boardman building.
Blaine	CB G-36	Central business Garden subdistrict	Not Allowed	Not in city's zoning code as it's own chapter but in the zoning layer and 2017 comp plan map
Blaine	CB G-48	Central business Garden subdistrict	Not Allowed	Not in city's zoning code as it's own chapter but in the zoning layer and 2017 comp plan map
Blaine	CB M-48	Central business-Market subdistrict	Not Allowed	Not in city's zoning code as it's own chapter but in the zoning layer and 2017 comp plan map
Blaine	CB M-60	Central business-Market subdistrict	Not Allowed	Not in city's zoning code as it's own chapter but in the zoning layer and 2017 comp plan map
Blaine	CB TP-60	Central business-Town portal subdistrict	Not Allowed	Not in city's zoning code as it's own chapter but in the zoning layer and 2017 comp plan map
Blaine	CB WV-36	Central business-Waterview subdistrict	Not Allowed	Not in city's zoning code as it's own chapter but in the zoning layer and 2017 comp plan map
Blaine	CB – W	Wharf	Conditional	Designated for water oriented industry
Blaine	GW	Gateway	Permitted	Allowed when primary access is provided from Boblett Street
Blaine	HCa	Highway commercial Subzone A	Conditional	Manufacturing or assembly operations of small scale, not to exceed 5,000 square feet of floor space; manufactured goods are available for purchase and removal from the premises
Blaine	HCb	Highway commercial Subzone B	Conditional	Manufacturing or assembly operations of small scale, not to exceed 5,000 square feet of floor space; manufactured goods are available for purchase and removal from the premises
Blaine	HCc	Highway commercial Subzone C	Not Allowed	Not in city's zoning code as it's own chapter but in the zoning layer and 2017 comp plan map
Blaine	HCd	Highway commercial Subzone D	Not Allowed	Not in city's zoning code as it's own chapter but in the zoning layer and 2017 comp plan map
Blaine	M	Manufacturing	Permitted	

Survey of Zoning Districts Allowing Industrial Uses

City	Zoning Code	Zoning District	Ind Allowed	Note
Blaine	Ma	Manufacturing Subzone A	Permitted	Not in city's zoning code as it's own chapter but in the zoning layer and 2017 comp plan map
Blaine	Mb	Manufacturing Subzone B	Permitted	Not in city's zoning code as it's own chapter but in the zoning layer and 2017 comp plan map
Blaine	Mc	Manufacturing Subzone C	Permitted	Warehousing/storage and processing and shipping terminals are not permitted in Subzone C. Not in city's zoning code as it's own chapter but in the zoning layer and 2017 comp plan map
Blaine	MPR	Marine planned recreation	Conditional	Conditional industrial use for boat repair facilities, warehouses, and fish processing facilities
Blaine	PC	Planned commercial	Not Allowed	
Blaine	PR	Planned residential	Not Allowed	
Blaine	PUB	Public	Not Allowed	
Blaine	R/O	Residential/office	Not Allowed	
Blaine	RH	Residential high-density	Not Allowed	
Blaine	RL	Residential low-density	Not Allowed	
Blaine	RM	Residential medium-density	Not Allowed	
Blaine	RPR	Residential planned recreation	Not Allowed	
Blaine	SF-1	Single-family detached	Not Allowed	
Blaine	SF-2	Single-family attached	Not Allowed	
Everson	AG	Agricultural	Not Allowed	
Everson	C	Commercial	Conditional	Warehousing, assembly and light manufacturing
Everson	LI	Light Industrial	Permitted	
Everson	RMU	Residential-Multiple Use	Not Allowed	
Everson	PUB	Public	Not Allowed	Not in code but in layer
Everson	R	Residential	Not Allowed	Woodworking in enclosed buildings is conditionally allowed. No other industrial related activates permitted, conditionally or otherwise.
Everson	R	Residential	Not Allowed	Woodworking in enclosed buildings is conditionally allowed. No other industrial related activates permitted, conditionally or otherwise. Noted in R-7500 in GIS layer
Everson	ROS	Recreational/Open Space	Not Allowed	Not in code but in layer
Everson	WA	Water Areas	Not Allowed	Not in code but in layer
Ferndale	CC	City Center	Not Allowed	
Ferndale	GB	General Business	Permitted	Provides a use district for commercial establishments which require a retail contact with the public together with professional offices, incidental shop work, limited storage and warehousing, or light manufacturing and extensive outdoor storage and display, as well as retail uses with similar requirements.

Survey of Zoning Districts Allowing Industrial Uses

City	Zoning Code	Zoning District	Ind Allowed	Note
Ferndale	LI	Light Industrial	Permitted	The purpose of the light industrial zone is to accommodate industrial uses that have a relatively light impact on adjoining uses and that do not create noise, smoke, odors or other objectionable nuisances on the surrounding area
Ferndale	M	Manufacturing	Permitted	
Ferndale	MXD	Mixed Use Commercial	Not Allowed	
Ferndale	PI	Public/Institutional	Not Allowed	
Ferndale	RMH	Residential Multifamily – High	Not Allowed	
Ferndale	RMM	Residential Multifamily – Medium	Not Allowed	
Ferndale	RO	Residential-Office	Not Allowed	
Ferndale	RR	Regional Retail	Not Allowed	
Ferndale	RS High	Residential High – Single-Family Dwelling	Not Allowed	
Ferndale	RS Low	Residential Low – Single-Family Dwelling	Not Allowed	
Ferndale	RS Medium	Residential Medium – Single-Family Dwelling	Not Allowed	
Ferndale	UR	Urban Residential	Not Allowed	
Lynden	CSL	Local Commercial Services	Permitted	Manufacture, fabrication, assembly, woodworking and metal working shops, where at least 20% of the GFA is related to on-site retail or office space
Lynden	CSR	Regional Commercial Services	Permitted	Manufacture, fabrication, assembly, woodworking and metal working shops, where at least 20% of the GFA is related to on-site retail or office space
Lynden	HBD	Historic Business District	Not Allowed	
Lynden	IBZ	Industrial Business Zone	Permitted	
Lynden	ID	Industrial District	Permitted	
Lynden	MH	Mobile and Modular Home	Not Allowed	
Lynden	PU	Public Use	Not Allowed	
Lynden	RM-1	Single Family and two Family Dwellings/bldg.	Not Allowed	
Lynden	RM-2	Up to 4 Dwellings/bldg.	Not Allowed	
Lynden	RM-3	Multiple Dwellings	Not Allowed	
Lynden	RM-4	Multiple Dwellings	Not Allowed	
Lynden	RMD	Residential Mixed Density	Not Allowed	
Lynden	RM-PC	Detached Single Family Dwellings	Not Allowed	
Lynden	RS-100	Single Family Dwellings	Not Allowed	
Lynden	RS-72	Single Family Dwellings	Not Allowed	
Lynden	RS-84	Single Family Dwellings	Not Allowed	
Lynden	TR	Travel/Recreational Vehicle	Not Allowed	

Survey of Zoning Districts Allowing Industrial Uses

City	Zoning Code	Zoning District	Ind Allowed	Note
Nooksack	AgUR	Agricultural Urban Reserve	Not Allowed	
Nooksack	CM	Central Market	Conditional	Equipment rental and sales yards; Lumber yards; Machine shops; Warehouses; Contractor's storage yards; Ice manufacturing, cold storage;
Nooksack	C	Commercial	Conditional	Warehouses and machine shops
Nooksack	LI	Light Industrial	Permitted	
Nooksack	OS/AG	Open Space / Agriculture	Not Allowed	
Nooksack	PF	Public Facilities	Not Allowed	
Nooksack	Rec	Recreational	Not Allowed	
Nooksack	Res	Residential	Not Allowed	
Nooksack	Res-8600	Residential-8600	Not Allowed	In GIS layer but not the Code
Sumas	OS/AG	Open Space/Agricultural	Not Allowed	
Sumas	BG	Business, General	Not Allowed	
Sumas	BLI	Business District III-Low Impact	Not Allowed	
Sumas	MW	Mini-Warehouse	Not Allowed	For small to medium warehousing use
Sumas	BT	Business District, Traffic Oriented	Not Allowed	
Sumas	I	Industrial	Permitted	
Sumas	P	Public	Not Allowed	In layer, but not in code
Sumas	R-6	Residential, High Density	Not Allowed	
Sumas	RS-15	Single-Family Residential, Low Density	Not Allowed	
Sumas	R-7	Residential, Medium Density	Not Allowed	
Sumas	RV	Recreational Vehicle Park	Not Allowed	
Whatcom County	AG	Agricultural	Not Allowed	
Whatcom County	AO	Airport Operations	Permitted	Allow for airport related industrial activities
Whatcom County	CF	Commercial Forestry	Not Allowed	
Whatcom County	ELIZA-IS	Eliza Island District	Not Allowed	
Whatcom County	FEDERAL	Federal	Not Allowed	
Whatcom County	GC	General Commercial	Not Allowed	
Whatcom County	GM	General Manufacturing	Permitted	Rural general manufacturing activities which by their nature are less intensive uses than those of heavy industry but of greater intensity than uses associated with the Rural Industrial and Manufacturing District, and to provide employment opportunities for residents of the rural area. General manufacturing uses are primarily related to fabrication, manufacture, storage and distribution of products which have minimal off-site impacts on adjacent nonindustrial zone districts
Whatcom County	HII	Heavy Impact Industrial	Permitted	
Whatcom County	LII	Light Impact Industrial	Permitted	New oil refineries are prohibited

Survey of Zoning Districts Allowing Industrial Uses

City	Zoning Code	Zoning District	Ind Allowed	Note
Whatcom County	NC	Neighborhood Commercial	Not Allowed	
Whatcom County	R10A	Rural	Not Allowed	
Whatcom County	R2A	Rural	Not Allowed	
Whatcom County	R5A	Rural	Not Allowed	
Whatcom County	R5A*	Rural	Not Allowed	
Whatcom County	RC	Resort Commercial	Not Allowed	
Whatcom County	RF	Rural Forestry	Permitted	Light industrial and manufacturing practces related to wood products are allowed.
Whatcom County	RGC	Rural General Commercial	Conditional	Allowed with administrative approval
Whatcom County	RIM	Rural Industrial and Manufacturing	Permitted	
Whatcom County	ROS	Recreation and Open Space	Not Allowed	
Whatcom County	RR1	Residential Rural	Not Allowed	
Whatcom County	RR10A	Residential Rural	Not Allowed	
Whatcom County	RR2	Residential Rural	Not Allowed	
Whatcom County	RR2A*	Residential Rural	Not Allowed	
Whatcom County	RR3	Residential Rural	Not Allowed	
Whatcom County	RR5A	Residential Rural	Not Allowed	
Whatcom County	RR5A*	Residential Rural	Not Allowed	
Whatcom County	RRI	Rural Residential-Island	Not Allowed	
Whatcom County	STC	Small Town Commercial	Conditional	
Whatcom County	TC	Tourist Commercial	Not Allowed	
Whatcom County	TZ	Point Roberts Transitional Zoning District	Not Allowed	
Whatcom County	UR	Urban Residential	Not Allowed	
Whatcom County	UR3	Urban Residential	Not Allowed	
Whatcom County	UR4	Urban Residential	Not Allowed	
Whatcom County	UR6	Urban Residential	Not Allowed	
Whatcom County	URM18	Urban Residential Medium Density District	Not Allowed	
Whatcom County	URM24	Urban Residential Medium Density District	Not Allowed	
Whatcom County	URM6	Urban Residential Medium Density District	Not Allowed	
Whatcom County	URMX	Urban Residential Mixed District	Not Allowed	
Whatcom County	URMX6-10	Urban Residential Mixed District	Not Allowed	
Whatcom County	URMX6-12	Urban Residential Mixed District	Not Allowed	

Appendix D

Reference Maps

Industrial Areas Reference Map

Truck Freight Corridor Reference Map

Appendix E

Critical Area Factors

Jurisdiction	Critical Area Overlay	Buffer Code Requirement	Code documentation	GIS Analysis Impact	Assumed Buffer for GIS Analysis	Development Impact	Notes
City of Bellingham	Fish and Wildlife Habitat	N/A	https://bellingham.municipal.codes/BMC/16.55.475	Development Obstacle	N/A	No expressed prohibition of industrial development.	A critical areas report for a habitat conservation area shall be prepared by a qualified professional
City of Bellingham	Frequently Flooded Areas	N/A	https://bellingham.municipal.codes/BMC/16.55.400	Development Obstacle	N/A	All proposed development within designated flood hazard areas shall be consistent with the most current version of the floodplain management regulations.	FEMA layer or https://maps.cob.org/arcgis3/rest/services/Planning/BuildableLands/MapServer/5
City of Bellingham	Mine Hazard Area	A qualified professional authors a report with a recommendation for the minimum no-disturbance buffer and minimum building setback from any geologic hazard based upon the geotechnical analysis	https://bellingham.municipal.codes/BMC/16.55.433	Development Obstacle	N/A	Flagged but industrial use not necessarily prohibited.	Activities proposed to be located in mine hazard areas shall meet the standards of Performance standards – General requirements (BMC 16.55.450)
City of Bellingham	Seismic Hazard Area	A qualified professional authors a report with a recommendation for the minimum no-disturbance buffer and minimum building setback from any geologic hazard based upon the geotechnical analysis	https://bellingham.municipal.codes/BMC/16.55.432	Development Obstacle	N/A	Flagged but industrial use not necessarily prohibited.	Activities proposed to be located in seismic hazard areas shall meet the standards of Performance standards – General requirements (BMC 16.55.450)
City of Bellingham	Steep Slopes: Landslide Hazard Area	Minimum Buffer. The minimum buffer shall be equal to the height of the slope or 50 feet, whichever is greater. Buffer may be reduced when a qualified professional demonstrates to the director's satisfaction.	https://bellingham.municipal.codes/BMC/16.55.460	Acre Impediment	50 feet	**A buffer shall be established from all edges** of landslide hazard areas or where the director determines a larger buffer is necessary to prevent risk of damage to proposed and existing development	This would be an acreage reduction area, but data is not sufficient to calculate steep slopes based on percent grade and vertical elevation. 16.55.420 (B) Landslide Hazard Areas: Specific landslide hazard areas include slopes with an incline that is equal to or greater than 40 percent grade (22 degrees) with a vertical elevation change of at least 10 feet. Slope shall be calculated by identifying slopes that have at least 10 feet of vertical elevation change within a horizontal distance of 25 feet or less.
City of Bellingham	Stream Buffer	Stream buffer called "riparian habitat area" is various depending on stream/species type and stream width. Buffer widths range from 50-225 feet.	https://bellingham.municipal.codes/BMC/16.55.500	**Acre Reduction**	200 feet	Industrial use prohibited for portion of property within buffer.	Buffers range from 50-225 ft; 200 ft is conservative. Important upland habitats and species are identified on a case by case basis
City of Bellingham	Wetlands	Various depending on habitat and water quality ratings. Range if 25-200 feet	https://bellingham.municipal.codes/BMC/16.55.340	**Acre Reduction**	150	Industrial use prohibited for portion of property within overlay.	Wetland buffers range from 25-200 ft based on value of the wetland. The determination is subject to many parameters, some of which are subjective, and all of which need to be based on a "property-specific assessment." For Bellingham assumed a typical wetland to be moderate intensity and category II resulting in a 150 foot buffer
City of Blaine	Stream Habitat Conservation Areas	Class A regulated under SMP. Class B is a 100 foot buffer and C is 50 feet from OHWM.	https://www.codepublishing.com/WA/Blaine/html/Blaine17/Blaine1782.html#17.82.410	**Acre Reduction**	100 feet	Development prohibited in buffer	
City of Blaine	Steep Slopes	Buffers are based on report certified by a professional engineer or a geotechnical engineer.	https://www.ci.blaine.wa.us/DocumentCenter/View/7457/SMP-Part-2_v1212-27-12edits?bidId=	Acre Impediment	Use 50-feet from top and bottom of slope	No expressed prohibition of industrial development.	This would be an acreage reduction area, but data is not sufficient to calculate steep slopes based on percent grade and vertical elevation. Steep slope can be defined as a slope exceeding 40 percent and a minimum of 20 feet in height.

Jurisdiction	Critical Area Overlay	Buffer Code Requirement	Code documentation	GIS Analysis Impact	Assumed Buffer for GIS Analysis	Development Impact	Notes
City of Blaine	Wetlands	Various depending on habitat and water quality ratings. Range if 25-200 feet	https://www.codepublishing.com/WA/Blaine/html/Blaine17/Blaine1782.html#17.82.340	**Acre Reduction**	125		Wetland buffers range from 25-250 ft based on value of the wetland. The determination is subject to many parameters, some of which are subjective, and all of which need to be based on a "property-specific assessment." For Blaine assumed a typical wetland to be moderate intensity and category II resulting in a 125 foot buffer
City of Ferndale	Critical Aquifer Recharge Area	N/A	https://www.codepublishing.com/WA/Ferndale/html/Ferndale16/Ferndale1608.html#16.08.473	Development Obstacle	N/A	Excludes specific industrial uses including Landfills, Chemical waste/reprocessing facilities, wood and wood product manufacturing, chemical manufacturing, petroleum product refining	
City of Ferndale	Critical Aquifer Recharge Area	N/A	https://www.codepublishing.com/WA/Ferndale/html/Ferndale16/Ferndale1608.html#16.08.470	Development Obstacle	N/A	Excludes specific industrial uses including Landfills, Chemical waste/reprocessing facilities, wood and wood product manufacturing, chemical manufacturing, petroleum product refining	
City of Ferndale	Earthquake-Sensitive Areas	N/A	https://www.codepublishing.com/WA/Ferndale/html/Ferndale16/Ferndale1608.html#16.08.452	Development Obstacle	N/A	No expressed prohibition of industrial development.	Alteration of a steep slope or earthquake-sensitive area or a site within 200 feet of such area shall only be permitted if the technical report indicates that the project has been designed such that the risks associated with the hazard area have been reduced to within acceptable levels
City of Ferndale	Erosion Hazard Area	N/A	https://www.codepublishing.com/WA/Ferndale/html/Ferndale16/Ferndale1608.html#16.08.451	Development Obstacle	N/A	No expressed prohibition of industrial development.	Mitigation of risks to acceptable levels shall be certified by a professional engineer or a geotechnical engineer
City of Ferndale	Frequently Flooded Areas	N/A	https://www.codepublishing.com/WA/Ferndale/html/Ferndale16/Ferndale1608.html#16.08.520	Development Obstacle	N/A	All proposed development within designated flood hazard areas shall be consistent with the most current version of the floodplain management regulations.	All proposed development within designated flood hazard areas shall be consistent with the most current version of the City of Ferndale floodplain management regulations.
City of Ferndale	Ground Water Management Program	N/A	https://www.codepublishing.com/WA/Ferndale/html/Ferndale16/Ferndale1608.html#16.08.472	Development Obstacle	N/A	Excludes specific industrial uses including Landfills, Chemical waste/reprocessing facilities, wood and wood product manufacturing, chemical manufacturing, petroleum product refining	
City of Ferndale	Sole Source Aquifer	N/A	https://www.codepublishing.com/WA/Ferndale/html/Ferndale16/Ferndale1608.html#16.08.471	Development Obstacle	N/A	Excludes specific industrial uses including Landfills, Chemical waste/reprocessing facilities, wood and wood product manufacturing, chemical manufacturing, petroleum product refining	
City of Ferndale	Steep Slopes	Buffers are based on report certified by a professional engineer or a geotechnical engineer.	https://www.codepublishing.com/WA/Ferndale/html/Ferndale16/Ferndale1608.html#16.08.450	Acre Impediment	Use 50-feet from top and bottom of slope	No expressed prohibition of industrial development.	This would be an acreage reduction area, but data is not sufficient to calculate steep slopes based on percent grade and vertical elevation. Steep Slopes. Steep slopes shall include all areas with a slope inclination greater than or equal to 35 percent with a vertical relief of 10 or more feet

Jurisdiction	Critical Area Overlay	Buffer Code Requirement	Code documentation	GIS Analysis Impact	Assumed Buffer for GIS Analysis	Development Impact	Notes
City of Ferndale	Stream Buffer	From ordinary high water mark or 25 feet from top of slope if within a ravine with a slope greater than 20 percent. Type S Water: 200 feet Type F Water: 150 feet Type Np Water: 100 feet Type Ns Water: 25 feet	https://www.codepublishing.com/WA/Ferndale/html/Ferndale16/Ferndale1608.html#16.08.400	**Acre Reduction**	Based on water type if available. If not available then 150 feet.	Industrial use prohibited for portion of property within buffer.	Buffers range from 25-200 ft; 200 ft is conservative. Important upland habitats and species are identified on a case by case basis
City of Ferndale	Volcanic Hazards	N/A	https://www.codepublishing.com/WA/Ferndale/html/Ferndale16/Ferndale1608.html#16.08.453	Development Obstacle	N/A	No expressed prohibition of industrial development.	Mitigation of risks to acceptable levels shall be certified by a professional engineer or a geotechnical engineer
City of Ferndale	Wetlands	Various depending on habitat and water quality ratings. Range is 40-225 feet	https://www.codepublishing.com/WA/Ferndale/html/Ferndale16/Ferndale1608.html#16.08.300	**Acre Reduction**	105	Industrial use prohibited for portion of property within overlay	Wetland buffers range from 40-225 ft based on value of the wetland. The determination is subject to many parameters, some of which are subjective, and all of which need to be based on a "site-specific assessment." For Fernadale assumed a typical wetland to be moderate intensity (habitat score of 5) and category II resulting in a 105 foot buffer
Whatcom County	Critical Aquifer Recharge Area	N/A	https://www.codepublishing.com/WA/WhatcomCounty/html/WhatcomCounty16/WhatcomCounty1616.html#16.16.525	Development Obstacle	N/A	Some Industrial use prohibited, including: Wood treatment facilities, chemical manufacturing, landfills, Facilities that store, process, or dispose of radioactive substances	
Whatcom County	Erosion Hazard Area	The size of the setback shall be based on the findings of a qualified professional and shall protect critical areas and processes and minimize the risk of property damage, death or injury resulting from erosion over the life of the development, typically identified as 100 years	https://www.codepublishing.com/WA/WhatcomCounty/html/WhatcomCounty16/WhatcomCounty1616.html#16.16.342	Development Obstacle	N/A	In addition to the applicable general protective measures found in WCC 16.16.265, the technical administrator shall have the authority to require setbacks from the edges of any coastal, stream, or riverine hazard erosion area	Buffers have been repealed from standards.
Whatcom County	Frequently Flooded Areas	N/A	https://www.codepublishing.com/WA/WhatcomCounty/html/WhatcomCounty16/WhatcomCounty1616.html#16.16.420	Development Obstacle	N/A	All proposed development within designated flood hazard areas shall be consistent with the most current version of the floodplain management regulations.	All proposed development within designated flood hazard areas shall be consistent with the most current version of the City of Ferndale floodplain management regulations.
Whatcom County	Geologic Hazard Areas	N/A	https://www.codepublishing.com/WA/WhatcomCounty/html/WhatcomCounty16/WhatcomCounty1616.html#16.16.330	Development Obstacle	N/A	General development standards more stringent.	Setbacks and buffers have been repealed from the code
Whatcom County	Habitat Conservation Areas-Critical saltwater habitats		https://www.codepublishing.com/WA/WhatcomCounty/html/WhatcomCounty16/WhatcomCounty1616.html#16.16.740	**Acre Reduction**	150 feet	Buffers shall extend 150 feet landward from ordinary high water mark of the marine shore. Buffers shall not be required adjacent to shellfish protection districts, but only in nearshore areas where shellfish reside	
Whatcom County	Habitat Conservation Areas-Marine Nearshore Habitats	N/A	https://www.codepublishing.com/WA/WhatcomCounty/html/WhatcomCounty16/WhatcomCounty1616.html#16.16.740	**Acre Reduction**	150	Industrial use prohibited for portion of property within buffer	The buffer for marine nearshore habitats shall extend landward 150 feet from the ordinary high water mark.

Jurisdiction	Critical Area Overlay	Buffer Code Requirement	Code documentation	GIS Analysis Impact	Assumed Buffer for GIS Analysis	Development Impact	Notes
Whatcom County	Habitat Conservation Areas-Natural Ponds and Lakes		https://www.codepublishing.com/WA/WhatcomCounty/html/WhatcomCounty16/WhatcomCounty1616.html#16.16.740	**Acre Reduction**	50' for under 20 acres 100' for 20 acres or larger	Industrial use prohibited for portion of property within buffer	Ponds under 20 acres – Buffers shall extend 50 feet from the ordinary high water mark. Lakes 20 acres and larger (which are subject to WCC Title 23) – Buffers shall extend 100 feet from the ordinary high water mark; provided, that where vegetated wetlands are associated with the shoreline, the buffer shall be based on the wetland buffer requirements in WCC 16.16.630.
Whatcom County	Habitat Conservation Areas-Other	N/A	https://www.codepublishing.com/WA/WhatcomCounty/html/WhatcomCounty16/WhatcomCounty1616.html#16.16.740	Development Obstacle	N/A	No expressed prohibition of industrial development.	Minimum buffers shall be based on recommendations provided by the Washington State Department of Fish and Wildlife PHS Program; provided, that local and site-specific factors shall be taken into consideration and the buffer width based on the best available information concerning the species/habitat.
Whatcom County	Mine Hazard Area	N/A	http://www.codepublishing.com/wa/whatcomcounty/html/Whatco16/Whatco1616.html#16.16.320	Development Obstacle	N/A	No expressed prohibition of industrial development.	We could look for GIS data if this flagging is needed by the client.
Whatcom County	Seismic Hazard Area	N/A	https://www.codepublishing.com/WA/WhatcomCounty/html/WhatcomCounty16/WhatcomCounty1616.html#16.16.340	Development Obstacle	N/A	No expressed prohibition of industrial development.	We could look for GIS data if this flagging is needed by the client.
Whatcom County	Steep Slopes	Buffers are based on report certified by a professional engineer or a geotechnical engineer.	https://www.codepublishing.com/WA/WhatcomCounty/html/WhatcomCounty16/WhatcomCounty1616.html#16.16.343	Acre Impediment	Use 50-feet from top and bottom of slope	No expressed prohibition of industrial development.	This would be an acreage reduction area, but data is not sufficient to calculate steep slopes based on percent grade and vertical elevation. Any area with a slope of 40 percent or steeper and with a vertical relief of 10 or more feet except areas composed of competent bedrock or properly engineered slopes designed and approved by a geotechnical engineer licensed in the state of Washington and experienced with the site.
Whatcom County	Stream Buffer	Stream buffer called "riparian habitat area" is various depending on stream/species type and stream width.	https://www.codepublishing.com/WA/WhatcomCounty/html/WhatcomCounty16/WhatcomCounty1616.html#16.16.740	**Acre Reduction**	150 feet	Industrial use prohibited for portion of property within buffer.	Buffers range from 50-150 ft; 150 ft is conservative. Important upland habitats and species are identified on a case by case basis
Whatcom County	Tsunami Hazard Area	N/A	https://www.codepublishing.com/WA/WhatcomCounty/html/WhatcomCounty16/WhatcomCounty1616.html#16.16.343	Development Obstacle	N/A	No expressed prohibition of industrial development.	We could look for GIS data if this flagging is needed by the client.
Whatcom County	Volcanic Hazards	N/A	https://www.codepublishing.com/WA/WhatcomCounty/html/WhatcomCounty16/WhatcomCounty1616.html#16.16.341	Development Obstacle	N/A	No expressed prohibition of industrial development.	We could look for GIS data if this flagging is needed by the client.

Jurisdiction	Critical Area Overlay	Buffer Code Requirement	Code documentation	GIS Analysis Impact	Assumed Buffer for GIS Analysis	Development Impact	Notes
Whatcom County	Wetlands	Various depending on habitat and water quality ratings	https://www.codepublishing.com/WA/WhatcomCounty/html/WhatcomCounty16/WhatcomCounty1616.html#16.16.630	**Acre Reduction**	110	Industrial use prohibited for portion of property within overlay	Wetland buffers range from 50-300 ft based on value of the wetland. The determination is subject to many parameters, some of which are subjective, and all of which need to be based on a "property-specific assessment." For Whatcom County and all other jurisdictions assumed a typical wetland to be moderate intensity and category II resulting in a 110 foot buffer
Whatcom County and ALL jurisdictions	Floodway	No buffers. No development allowed in floodways in general.	https://bellingham.municipal.codes/BMC/17.76.210 https://www.codepublishing.com/WA/Ferndale/html/Ferndale15/Ferndale1524.html#15.24.360 https://www.codepublishing.com/WA/Blaine/html/Blaine17/Blaine1786.html#17.86.190 https://www.codepublishing.com/WA/WhatcomCounty/html/WhatcomCounty17/WhatcomCounty1716.html#17.16.120	**Acre Reduction**	No development is allowed within a regulatory floodway	No development is allowed within a regulatory floodway unless no net rise results from the activity. Assumed no development allowed.	

Appendix F

Industrial Area Profiles

Industrial Area Profiles Overview

Each industrial area was reviewed to determine development potential, considering critical area impacts, ownership, proposed developments, and other development factors. This section overviews the considerations for each of the 19 industrial areas.

The following list highlights trends in the industrial areas:

- Limited Large, Utility-Served Sites Near I-5: Most industrial areas along I-5 have limited fully served parcels over five acres. The top three are:
  - Bellingham Airport Industrial: 21 acres (near-term, fully served, near I-5)
  - Blaine Industrial: 9 acres
  - Ferndale Industrial: 8 acres
- West Lynden Leads in Near-Term Capacity: With 217.4 net acres of near-term developable land, West Lynden has the highest capacity among all industrial areas. However, none of this acreage is within a half mile of an I-5 exit.
- Long-Term, Utility-Ready Land Is Scarce: Only 55 acres of long-term industrial land are currently fully served by utilities. The largest shares are:
  - Ferndale Industrial: 21.2 acres
  - Sumas Industrial: 19 acres
- Sumas Industrial Unlock Potential: Extending utilities to the Sumas Industrial area could activate approximately 119 net acres of near-term developable land.
- Cherry Point Offers Large-Scale Opportunity: With 450 acres of near-term and 244 acres of long-term potential, Cherry Point could support major industrial development—if utility infrastructure is extended and regulatory, cultural, and environmental challenges are addressed. The area is well-suited for industries requiring direct rail and co-located with deep water pier access.
- Marine-Oriented Development Opportunities: Bellingham Fairhaven Marine and Bellingham Harbor Industrial offer near- and long-term development potential on utility-served, waterfront properties.
- Small Parcel Potential Near I-5: Study areas such as Blaine, Ferndale, and Grandview (North Ferndale) each have over 10 acres of fully served, 1–5 acre parcels within a half mile of I-5—ideal for small-scale, supportive industrial uses.
- Clusters of Small, Utility-Ready Parcels: Bellingham Airport Industrial, Iron Gate, Iowa St/Haskell BP, and Ferndale Industrial each contain over 30 acres of fully served parcels between 1 and 5 acres, offering strong potential for infill or smaller-scale industrial development.
- Top Utility-Served, Near-Term Areas: West Lynden and Ferndale have the largest amounts of utility-served, near-term development-ready land among all industrial areas.

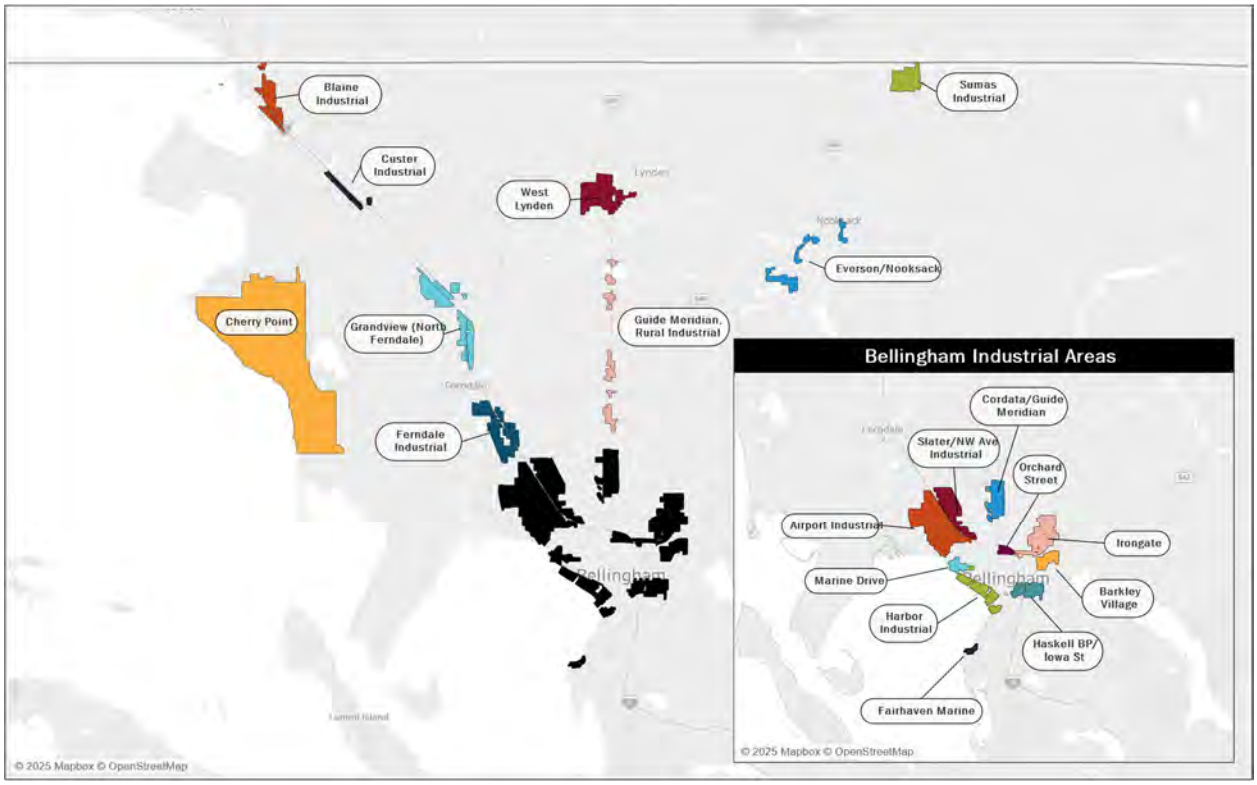
Each section below features a profile dashboard summarizing key development characteristics for the industrial areas. Each dashboard includes two maps: one illustrating critical areas and floodplain

constraints, and another omitting these layers to provide a clearer view of developable properties within each industrial area.

The profiles also emphasize proximity to freight corridors and assess utility access for properties located near these corridors, offering a concise overview of infrastructure readiness and strategic development potential.

The map below shows the industrial areas throughout the county.

Industrial Area Map*



*A larger copy of this map can be found in Appendix D: Reference Maps

Bellingham Airport Industrial Area

The Bellingham Airport Industrial Area encompasses the land surrounding Bellingham International Airport, including properties identified in the Bellingham International Airport Master Plan. The Airport Industrial Area encompasses 86 properties totaling approximately 326 acres. After excluding developed land, the industrial area contains an estimated 267.8 net developable acres.

Of the net developable land exceeding five acres:

- 61.2 acres are suitable for near-term development
- 11.2 acres present long-term development opportunities

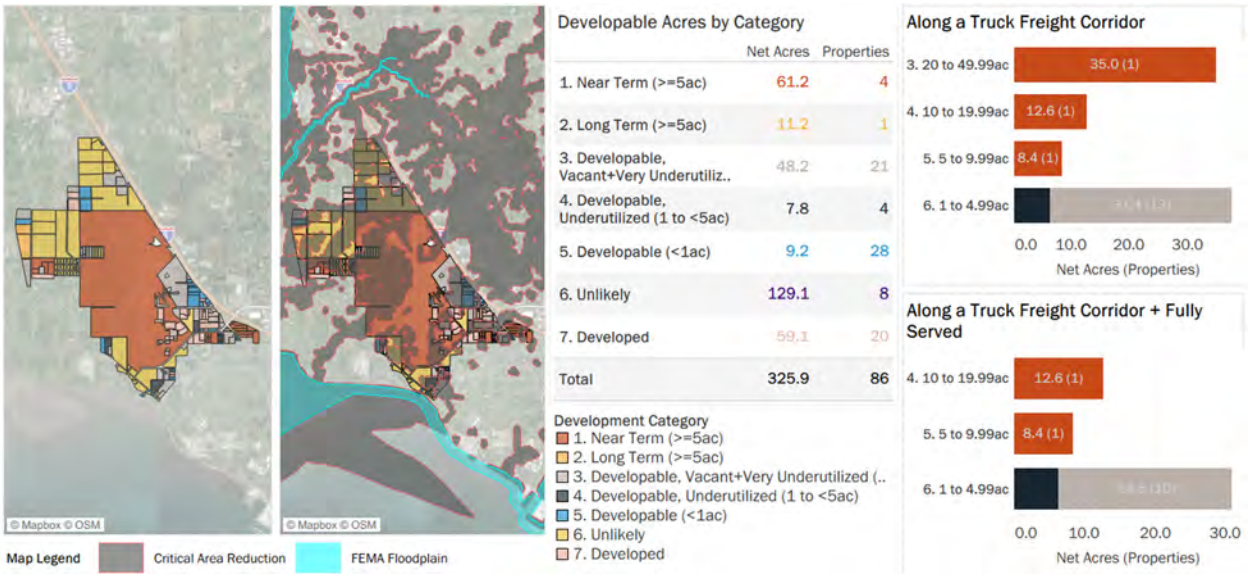
There are 48.2 net acres of developable vacant or significantly underutilized parcels ranging from one to five acres, distributed across 21 properties indicating a healthy set of smaller industrial sites.

More than half of the near-term developable acreage is located on Port-owned property, which includes the runway. Future development in these areas is subject to environmental and operational constraints, such as runway clearance requirements and wetland protections. Accordingly, development will be guided by the designated zones outlined in the Airport Master Plan. Overall, approximately 129 net acres across eight properties are considered unlikely to redevelop due to the presence of wetlands and limitations from airport-specific constraints, including runway protection zones and clearance requirements.

Most near-term developable acreage is located along a truck freight corridor, with a relatively even distribution of parcel sizes. Of the 48 net acres of developable vacant and underutilized land between one and five acres, approximately 31 acres are situated along this corridor.

However, when considering only properties that are both located along the freight corridor and fully served by utilities, the available acreage decreases:

- Near-term developable land drops to 21 net acres.
- Developable vacant and underutilized land between one and five acres drops to approximately 26 net acres.
- 56.1 net acres are comprised of developable parcels less than an acre.

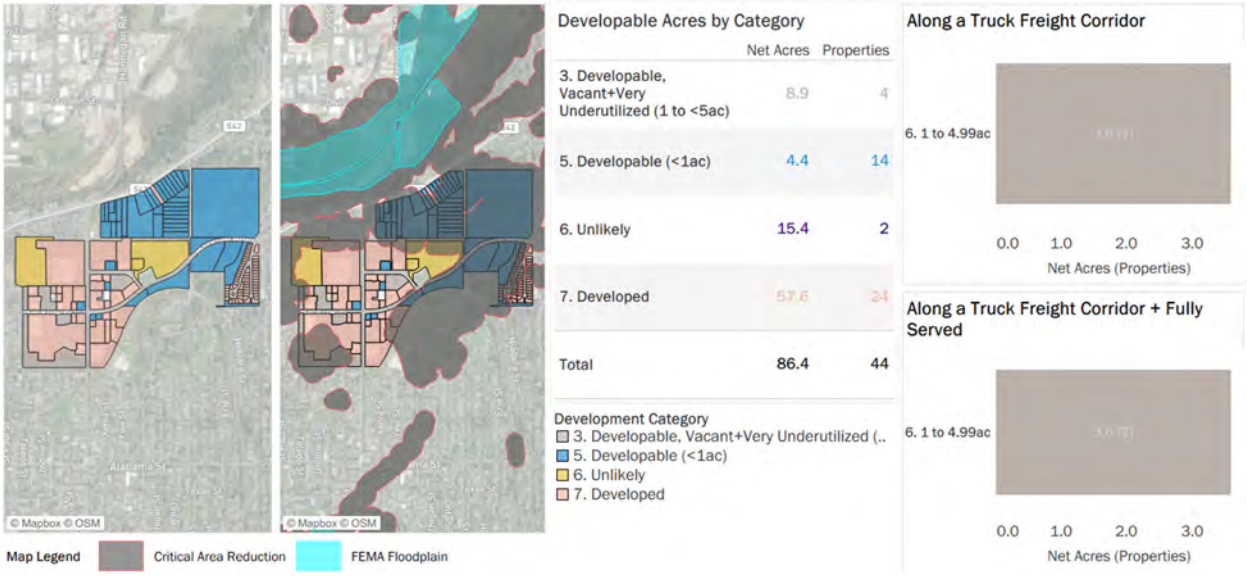


Bellingham Barkley Village Industrial Area

The industrial area along Barkley Boulevard, located on the east side of Bellingham, presents limited development opportunities. Most of the developable acreage in this industrial area is classified as unlikely for development (15.4 net acres).

There are no developable properties greater than five acres and most of the developable properties that are not "unlikely" are designated as Developable, Vacant+Very Underutilized (1 to <5ac). Redevelopment potential is constrained by zoning regulations associated with the Barkley Urban Village and Planned Action, which when adopted later in 2025, will not prioritize industrial development. However, there is limited potential for redevelopment within smaller properties located this industrial area.

In total, the area contains approximately 13.3 net developable acres, all on properties that are 5 acres or less. Of these developable acres, 3.6 are along a truck freight corridor and are both fully served by utilities.

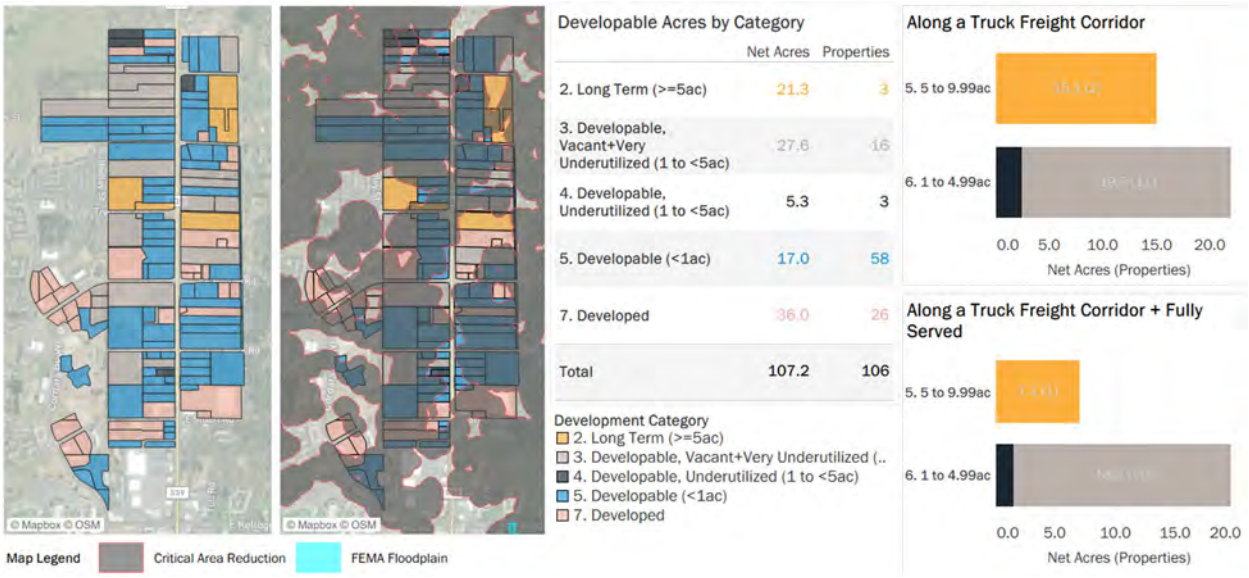


Bellingham Cordata/Guide Merdian Industrial Area

The Bellingham Cordata/Guide Meridian Study Area is situated along the northern boundary of the City of Bellingham and within its Urban Growth Area (UGA). The area is significantly constrained by wetlands and associated buffer zones, which are dispersed throughout the industrial area and limit development potential. Despite these constraints, the industrial area contains approximately 71.2 net developable acres. However, only 21.3 net acres—distributed across three properties—exceed five acres in size. These larger properties are designated for long-term development, reflecting the environmental limitations and the need for strategic planning to accommodate future growth.

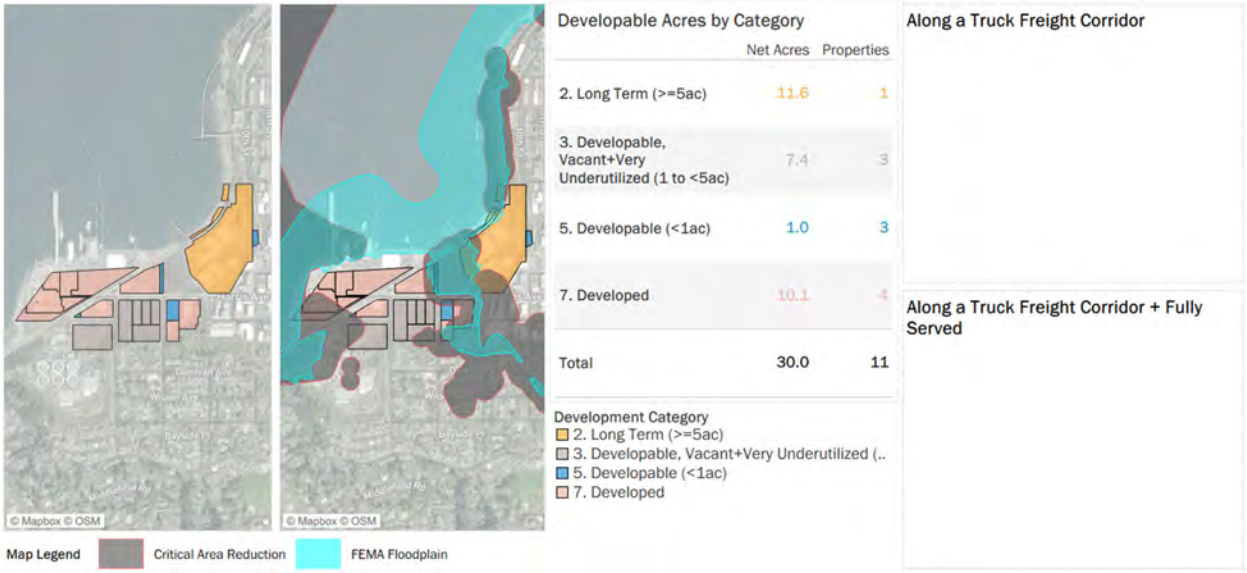
The industrial area includes approximately 27.6 net acres of developable, vacant or very underutilized land and 5.3 net acres of developable, underutilized land, all within the 1 to <5 acre range. Collectively, these nearly 33 net acres indicate meaningful potential for the redevelopment of smaller industrial properties. These properties may be well-suited for infill development or adaptive reuse, particularly where site conditions and access support efficient utilization.

When narrowing the focus to properties located along a designated truck freight corridor, the area contains 15.1 net acres of long-term developable land across two properties, and approximately 20 net acres of developable vacant and very underutilized land (1 to <5 acres) across 11 properties. Of the long-term developable acreage, only one parcel totaling 7.1 acres is fully served by utilities. In contrast, most of the smaller vacant and underutilized parcels along the corridor are fully served, enhancing their readiness for development.



Bellingham Fairhaven Marine Industrial Area

The Bellingham Fairhaven Marine industrial area is located south of the Bellingham Marina in the Fairhaven neighborhood. The largest developable property in this industrial area is owned by the Port and is in the northwest part of the area. It includes five existing buildings that are currently underutilized. The Port has established redevelopment plans for the property and is actively pursuing funding to support implementation. This 11.6 acre property is fully served by utilities and has beneficial location on the waterfront. There is potential for an additional building on the east side of the property. The remainder of the property is subject to wetland and floodplain constraints that may limit development options on the west side of the property. The remaining 8.4 net acres of developable net acreage in the industrial area is distributed across 6 properties. There are no properties along a truck freight corridor in this 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

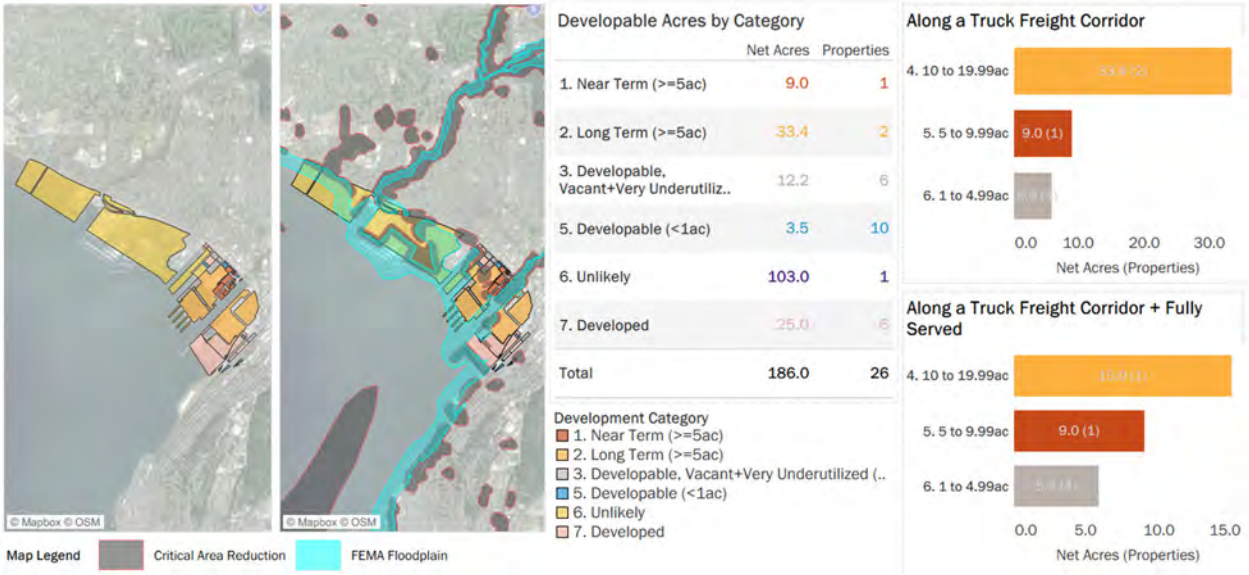
Along a Truck Freight Corridor

Along a Truck Freight Corridor + Fully Served

Bellingham Harbor Industrial Area

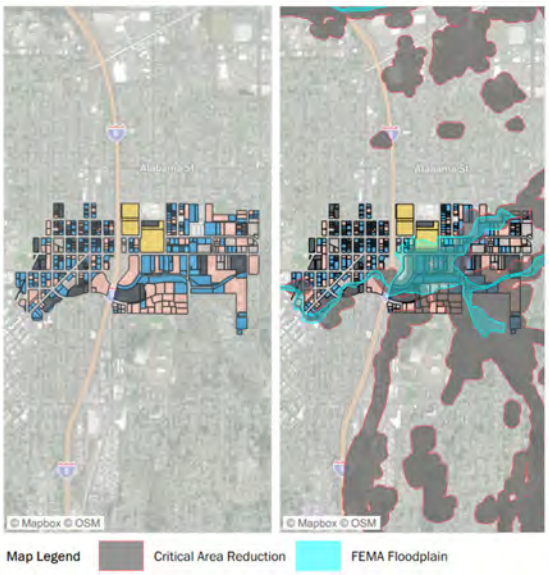
The Harbor Industrial Study Area is centrally located with direct water access and includes the Bellingham Marina and its surrounding properties. Portions of the area have planned development, including the future filling of the ASB pond, which will add approximately 15 net acres of long-term land for marine-industrial use. While much of the industrial area (103 acres) faces redevelopment limitations due to existing development, wetlands, and floodplain constraints, there are 58.3 net acres of developable industrial land. Of this, approximately nine net acres are available for near-term development. These areas are primarily underutilized, with existing buildings and infrastructure that may be repurposed for future industrial uses.

All near-term developable acreage, along with two long-term properties totaling 33.4 net acres, are located along a designated truck freight corridor. Of this total, all near-term acreage and 15 net acres of long-term developable land are fully served by utilities, indicating strong infrastructure alignment for industrial development. While most of the industrial area is located more than half a mile from an Interstate 5 exit, it benefits from direct rail access and proximity to marine facilities, offering valuable multimodal transportation options.



Bellingham Iowa St/Haskell BP Industrial Area

Located in central Bellingham near the Iowa Street exit (254) off I-5, this industrial industrial area currently lacks any single developable property larger than five net acres. However, it offers a total of 45.1 net developable acres across properties ranging from one to five acres. While two of the large sites in the industrial area are unlikely to be redeveloped due to existing uses, the majority of smaller properties in the industrial area are fully served by utilities and benefit from easy access to I-5—making them well-suited for smaller-scale, supportive industrial redevelopment. Majority of developable properties between one and five acres are both along a truck freight corridor and have full access to utilities. There are 30.8 net acres of developable industrial land under an acre, further signifying the area's opportunity for smaller industrial uses. Notably, properties located east of I-5 are subject to floodplain conditions, which may increase both the cost and complexity of redevelopment efforts.



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

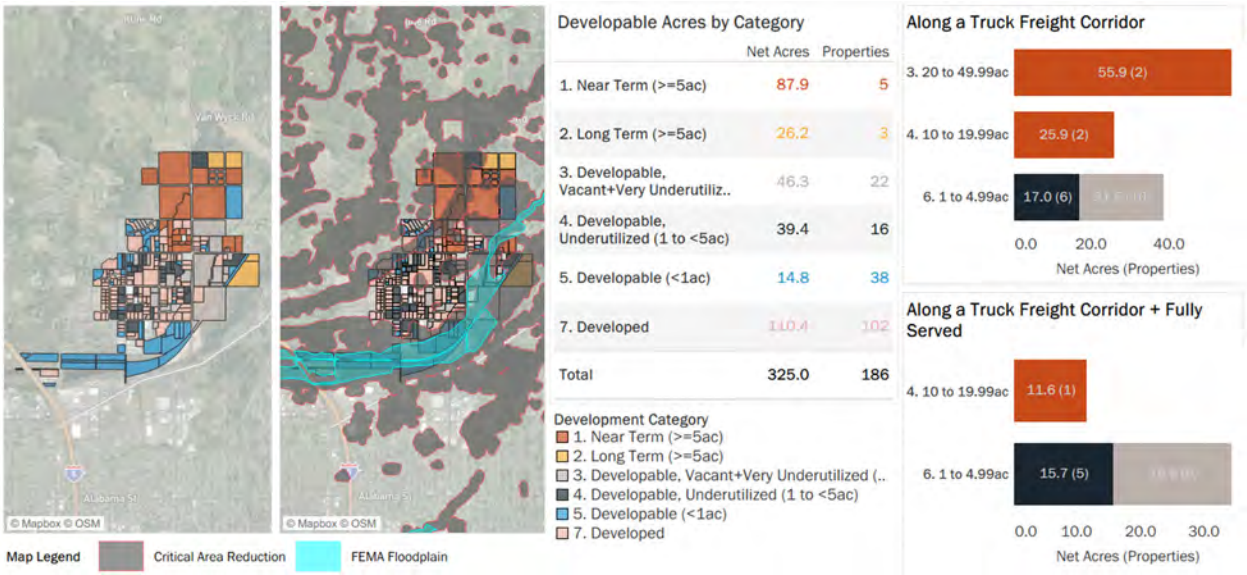
Development Category
- 3. Developable, Vacant+Very Underutilized (..
- 4. Developable, Underutilized (1 to <5ac)
- 5. Developable (<1ac)
- 6. Unlikely
- 7. Developed

Bellingham Irongate Industrial Area

Situated in the northeast corner of Bellingham, the industrial area includes land within and north of the existing Irongate Industrial Park. To the south and east, the Squalicum Creek floodplain poses development constraints. However, several smaller parcels—less than five acres in size—located south of Bakerview Road are fully served by utilities and offer strong redevelopment potential. In total, there are 86.4 net developable acres in properties under five acres, most of which have full utility access.

Five properties totaling 87.9 net acres are considered ready for near-term development; however, only two properties, comprising 17.6 net acres, currently have full utility service. Nearly all of the near-term developable industrial land—81.8 net acres—is located along a designated truck freight corridor, yet only one property, totaling 11.6 net acres, is both along a freight corridor and fully served by utilities.

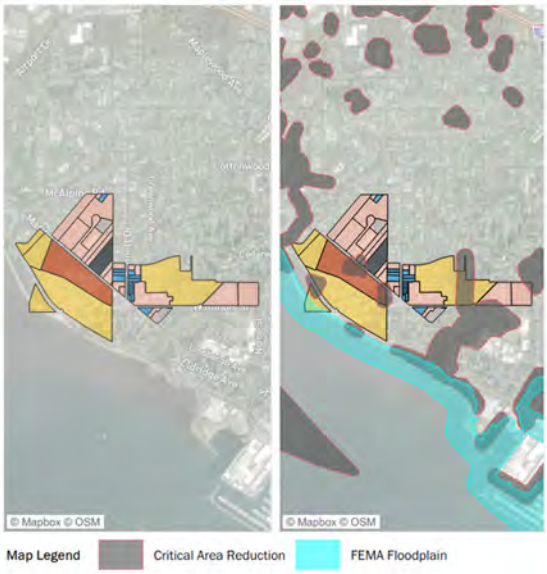
Larger properties are concentrated north of Bakerview Road, where most sites remain vacant and lack utility infrastructure. While some of these properties are affected by steep slopes and wetlands, the area offers viable near-term development potential if utility access is extended. In contrast, smaller properties in the southwest portion of the industrial area benefit from full utility access and proximity to I-5, enhancing their suitability for redevelopment. In total, there are 35.4 net acres of developable land between one and five acres that are both located along a freight corridor and fully served by essential utilities.



Bellingham Marine Drive Industrial Area

The Bellingham Marine Drive industrial area includes the industrial waterfront northeast of the Bellingham Marina, within the Bellingham UGA., Due to existing ownership patterns and established uses, about 69 percent of the of the 91 net a developable acres in this industrial area is unlikely to be redeveloped. There is only one near-term developable property in the industrial area totaling 13.7 net acres. Nearly all developable acreage in the industrial area is both located along a truck freight corridor and is fully served by utilities.

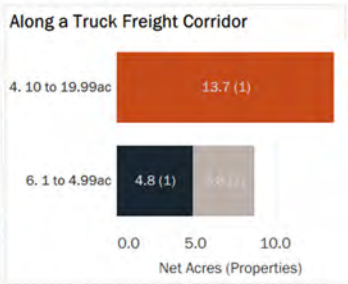
Most properties in the area are already served by essential utilities, and environmental constraints such as wetlands and floodplains are minimal. A notable opportunity for near-term redevelopment exists at the vacant ABC Recycling property along Marine Drive. With full utility access and direct frontage on Marine Drive, this site is well-positioned for future investment.

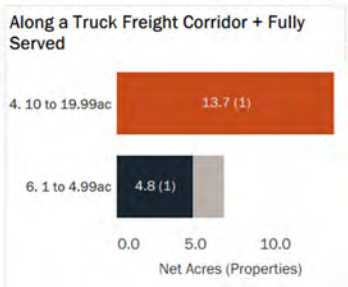


Developable Acres by Category

	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

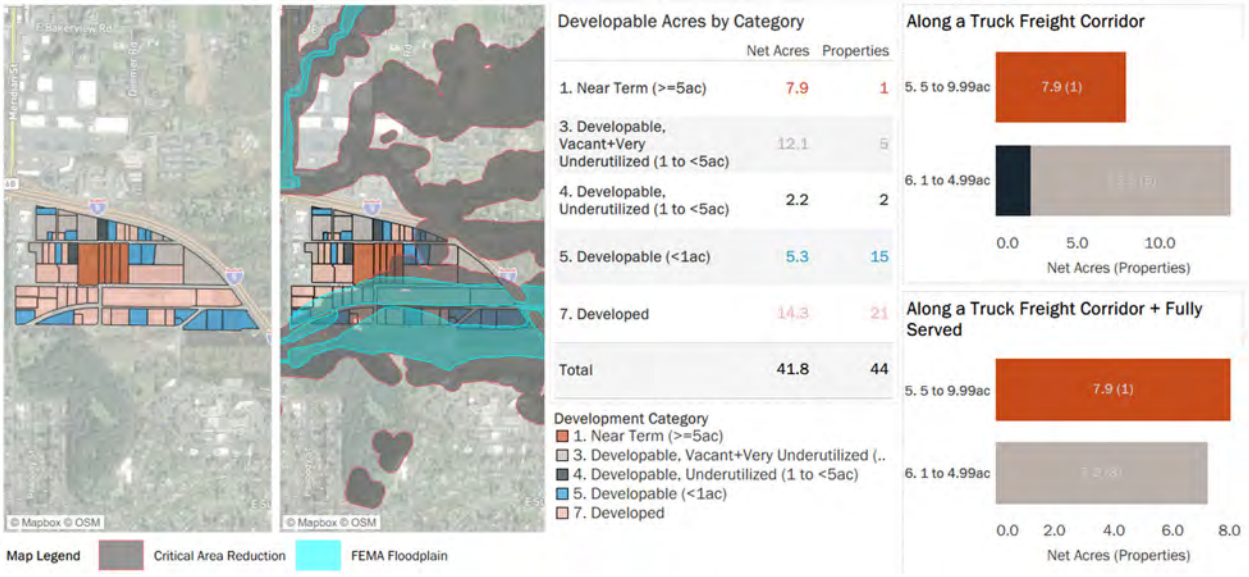
Development Category
- 1. Near Term (>=5ac)
- 3. Developable, Vacant+Very Underutilized (..
- 4. Developable, Underutilized (1 to <5ac)
- 5. Developable (<1ac)
- 6. Unlikely
- 7. Developed





Bellingham Orchard Street Industrial Area

The Bellingham Orchard Street industrial area includes properties located south of I-5 between Meridian Street and Birchwood Avenue. This area is heavily constrained by wetlands and floodplains, making development costly. The only property identified as suitable for near-term development is fully served by utilities, and is just off of exit 256A of I-5 and is 7.9 acres. Additionally, there are 7.2 net developable acres spread across three properties, each are developable vacant or very underutilized properties between one and five acres in size.

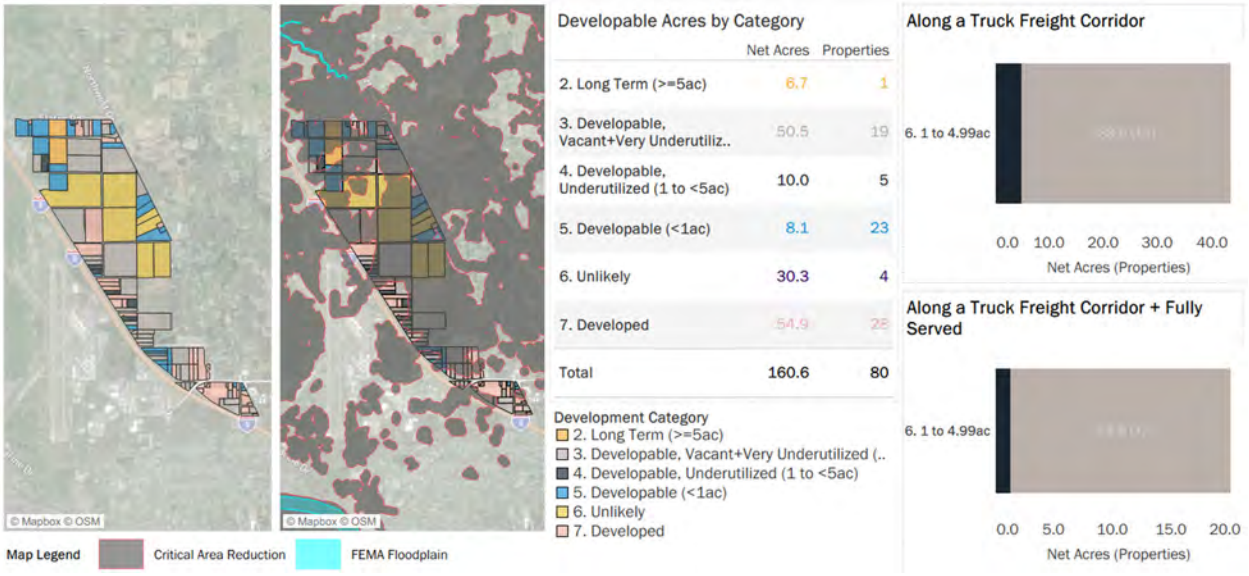


Bellingham Slater/NW Ave Industrial Area

The Bellingham Slate/Northwest Avenue industrial area encompasses the industrial corridor between Northwest Drive and I-5, located northeast of Bellingham International Airport. Development in this area faces significant constraints due to wetlands and airport runway clearance zones, making two major properties totaling 30.3 acres unlikely candidates for redevelopment.

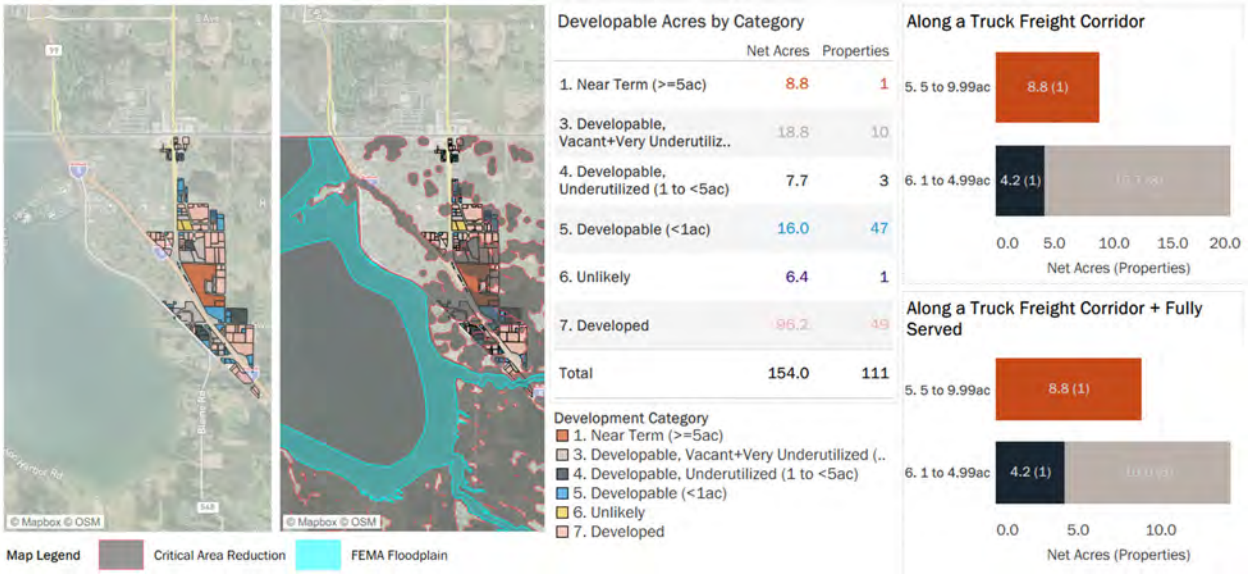
Most of the net developable acreage—totaling 60.5 net acres—is concentrated in parcels ranging from one to five acres. 50.5 net acres of the developable properties between one and five acres are vacant or very underutilized, indicating the need for infrastructure investment in the industrial area. There is a sole long-term developable property north of the industrial area, but it is not served by utilities nor along a freight truck freight corridor. Utility access is limited throughout the corridor, with only 23.7 acres currently served by full utility infrastructure. Despite these challenges, the area holds long-term potential due to its strategic location adjacent to I-5 at Exit 258. If wetland impacts can be mitigated and utility service extended, redevelopment opportunities could be unlocked.

The City of Bellingham owns approximately 100 acres of property in the Bellingham Slater/NW Ave industrial area that is identified to be a wetland mitigation bank. This bank may be used to unlock industrial development potential on other properties in Bellingham impacted by wetland. These properties that will be used for wetland banking are currently listed as developable but have fewer than one developable acre.



Blaine Industrial Area

The Blaine Industrial area encompasses the industrial corridor along I-5 and 543, just south of the city of Blaine. Due to significant wetland constraints, only 51.4 net acres are considered developable within the industrial area. The sole property over five acres currently being prepared for redevelopment is the future Blaine Industrial Park. A marketing flyer for the proposed 8.8 acre project outlines plans for three industrial buildings totaling 300,000 square feet. The site is currently vacant, fully served by utilities, and strategically located adjacent to I-5—just a five-minute drive from the Canadian border—making it attractive for development. There are 14,2 net acres across six properties that are between one and five net acres that are along a truck freight corridor and fully served by utilities in this industrial area.

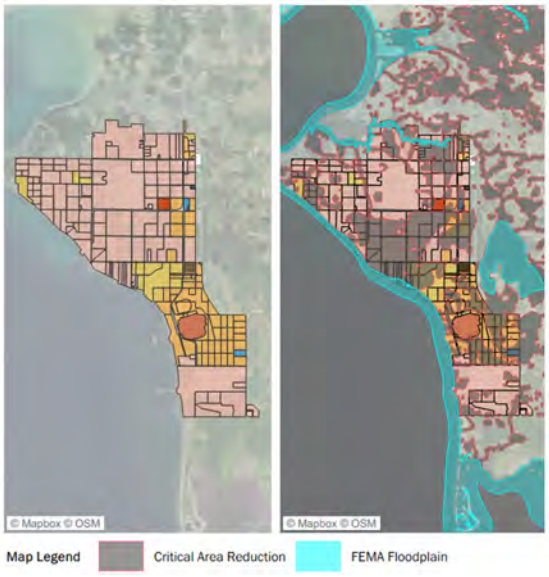


Cherry Point Industrial Area

The Cherry Point Industrial area is located along the Salish Sea and is defined by large-scale energy operations, including those operated by Alta and BP. While the area offers industrial development potential, it remains a controversial site for redevelopment related to political, cultural, and environmental concerns.

The industrial area is primarily composed of vacant land surrounding existing fossil fuel industry infrastructure. It benefits from direct access to rail and transload docks on the Salish Sea. However, no developable properties currently have access to the full range of utilities required to support industrial use, largely due to the area's location in unincorporated Whatcom County. Of the total land surveyed, 211 net acres—or 23 percent—are considered unlikely to be redeveloped due to existing uses and critical area constraints. However, large properties in the southern portion of the industrial area are served by power and water and are located along the existing rail line, positioning them well for near-term redevelopment. In total, there are 168 net acres ready for near-term development and 622 net acres identified for long-term development. The Alta Gas property totaling nearly 141 net acres of near-term development potential but is not along a truck freight corridor or served with sewer. There are no properties in this industrial area that are both proximate to a truck freight corridor and fully served by utilities.

With most properties exceeding 20 acres, the Cherry Point area presents an opportunity for industrial developers seeking large-scale sites—provided utility infrastructure can be expanded and regulatory challenges addressed.



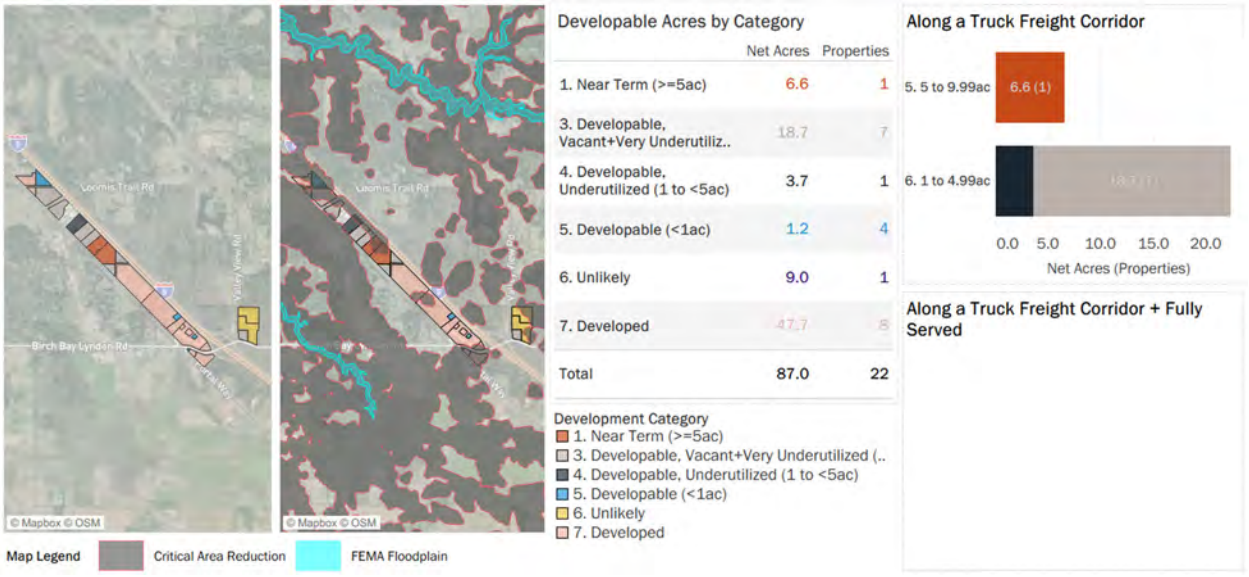
Developable Acres by Category

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

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

Custer Industrial Area

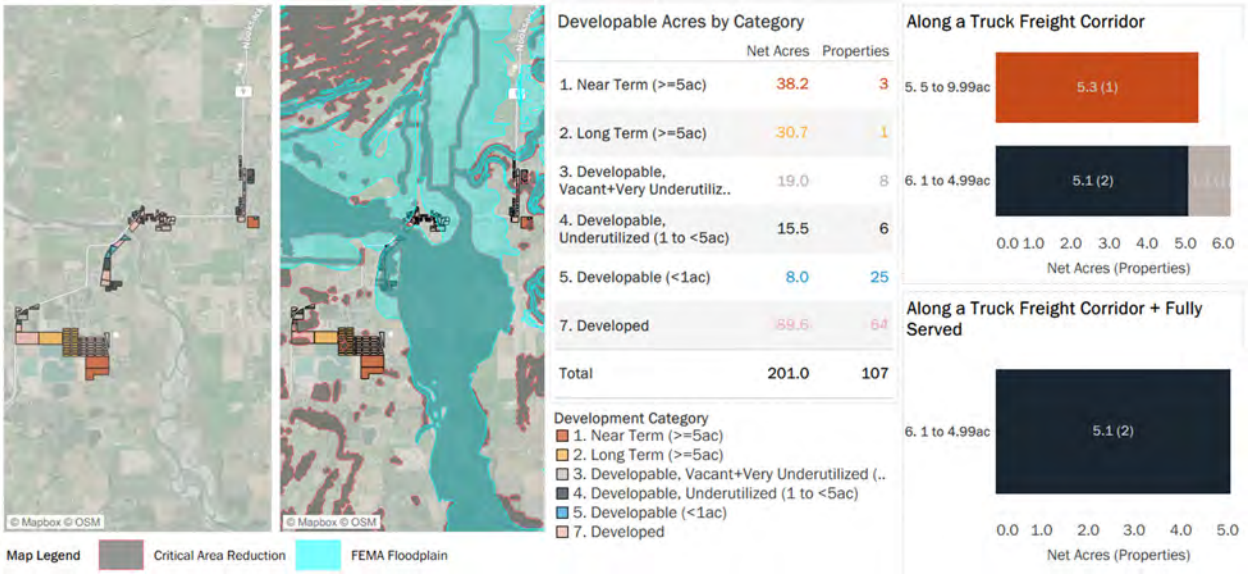
The Custer Industrial area is in an unincorporated industrial zone along I-5, east of Birch Bay. It is characterized by small, vacant parcels, each 10 net acres or less. Currently, none of the properties in the area are fully served by utilities, limiting immediate development potential. The only site identified for near-term redevelopment is located directly off I-5 at Exit 266. Although the property is impacted by wetlands, it could unlock 6.6 net acres of highway-adjacent industrial land if utility infrastructure were extended to the site. An additional 22.4 net developable acres are spread across eight properties, each between one and five acres. These smaller sites could support highway-adjacent industrial uses if utility connections were established.



Everson/Nooksack Industrial Area

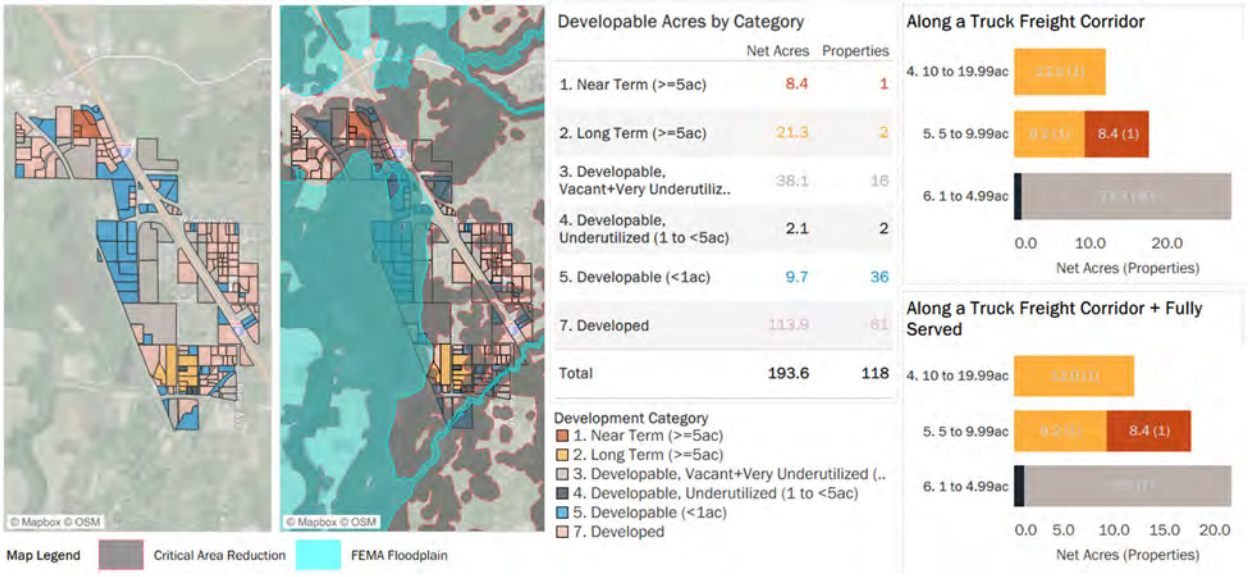
The Everson/Nooksack industrial area encompasses the combined industrial zones around the cities of Everson and Nooksack. A significant portion of this area is constrained by wetlands and impeded by floodplain conditions, limiting development potential. Despite these challenges, there are 111 net acres of developable land identified within the industrial area. Three properties, totaling 38.2 acres, are currently served by power and water utilities and have been identified as candidates for near-term development. Additionally, a 30.7-acre property located north of the existing quarries is served by water and is recognized for its long-term development potential. Only one near-term developable property, totaling 5.3 net acres, is located along a designated truck freight corridor. Currently, there are no near-term or long-term development properties in the area that are fully served by utilities.

Although the Everson/Nooksack area is farther from major freight corridors compared to other industrial areas, it still presents viable short- and long-term development potential, contingent upon the extension of utility infrastructure.



Ferndale Industrial Area

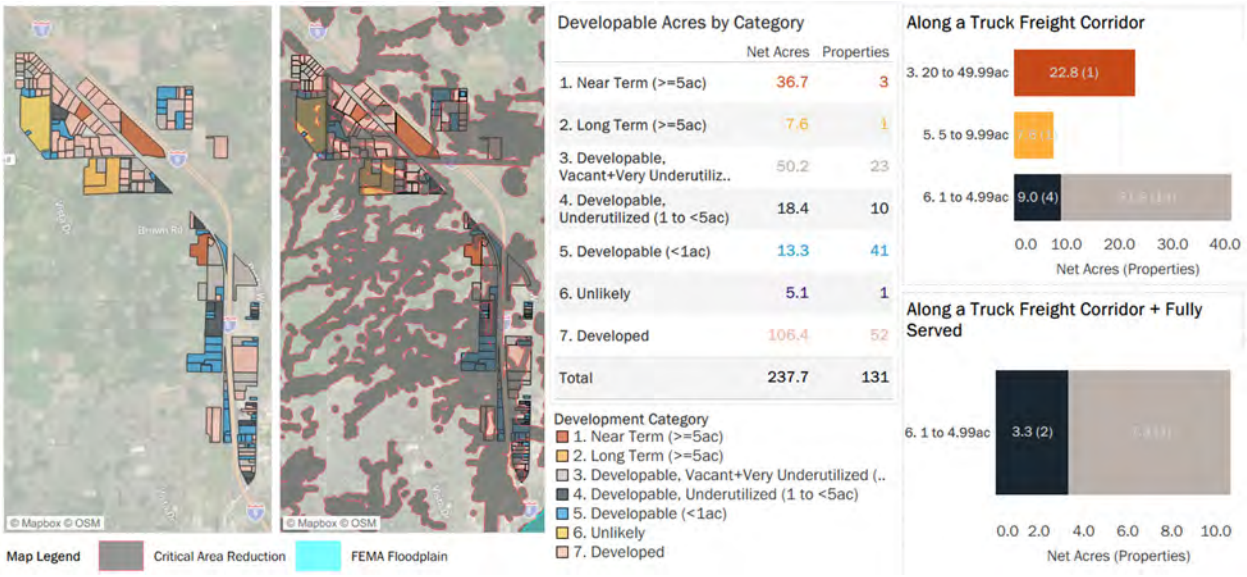
The Ferndale industrial area is located along I-5 at the southern edge of the City of Ferndale, just north of Bellingham International Airport. While much of the area is constrained by wetlands and floodplain conditions, there are notable opportunities for both near- and long-term industrial growth. Two properties, totaling 21 net developable acres, are currently used for waste disposal but are considered viable for future long-term redevelopment due to full utility access and proximity to I-5. On the northern edge of the industrial area, an 8-acre parcel with full utility service and direct access to an I-5 interchange presents a strong opportunity for near-term industrial development. Additionally, nearly 22 net developable acres—across properties between 1 and 4.99 acres—are fully served by utilities and along I-5. Overall, the industrial area offers strategic highway access and solid utility infrastructure, though environmental constraints limit the number of readily developable sites.



Grandview (North Ferndale) Industrial Area

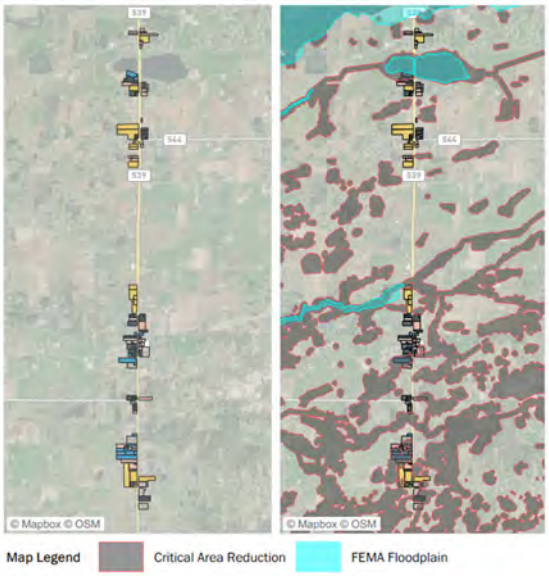
The Grandview industrial area is located along I-5, north of Ferndale, within the UGA. The area faces several wetland constraints and, in many places, currently lacks access to essential utilities. Despite these limitations, the industrial area holds near-term development potential on 36.7 net acres, contingent on the extension of utility services. One of these near-term development properties totaling 22.8 net acres is located along I-5. There is one truck freight corridor adjacent property totaling 7.6 net acres identified for having long-term development potential. Most properties along I-5 in this area are relatively small—under five acres—with 33 such properties totaling 68.6 net acres. Of this total, 10.6 acres are located along a truck freight corridor and have full utility access.

With infrastructure investment, this industrial area offers both near- and long-term development opportunities due to its strategic location near I-5 Exit 266.



Guide Meridian, Rural Industrial

The Guide Meridian Rural Industrial area is in an unincorporated region south of Lynden and is not currently zoned for industrial use. As a result, redevelopment in this area is unlikely under current conditions. However, if rezoned to allow industrial activity, the area could support small-scale fabrication or manufacturing operations, serving the needs of rural Whatcom County. Its location and property sizes may be well-suited for low-impact industrial uses, provided infrastructure and zoning align with future development goals.



Developable Acres by Category

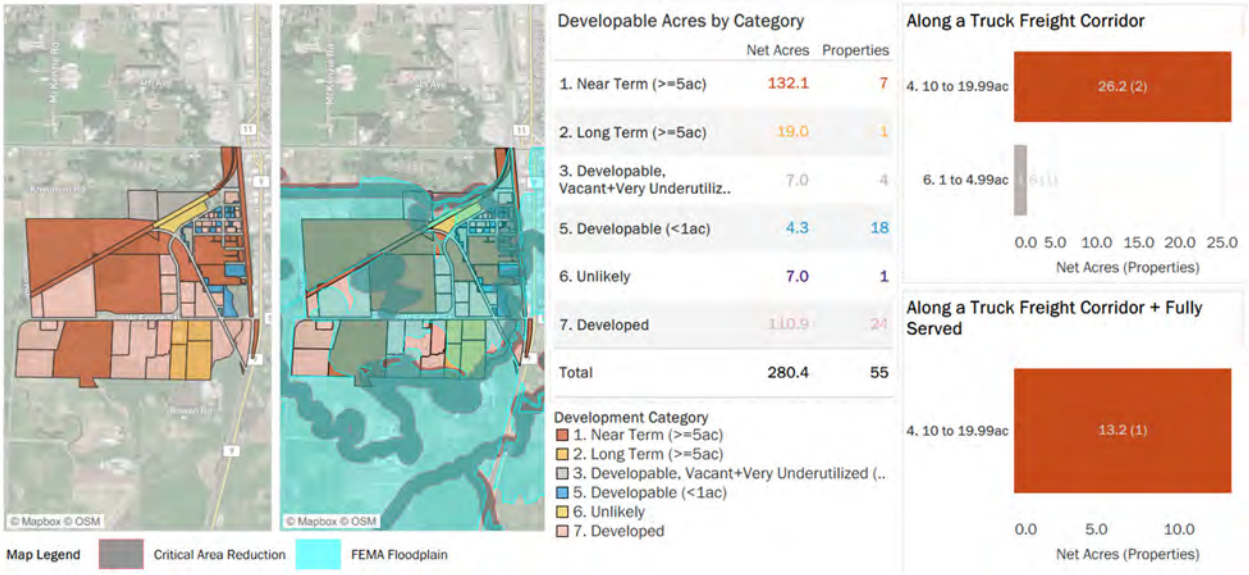
	Net Acres	Properties
3. Developable, Vacant+Very Underutilized (1 to <5ac)	34.0	15
4. Developable, Underutilized (1 to <5ac)	42.5	17
5. Developable (<1ac)	13.9	29
6. Unlikely	76.8	10
7. Developed	38.2	25
Total	205.3	96

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

Sumas Industrial

The Sumas industrial area is a cluster of industrial properties located on the west side of Sumas, with direct rail access. The entire area lies within FEMA-designated floodplains, significantly complicating and increasing the cost of development, which contributes to uncertainty for potential investors. Additionally, most properties lack full utility service, further limiting immediate development potential.

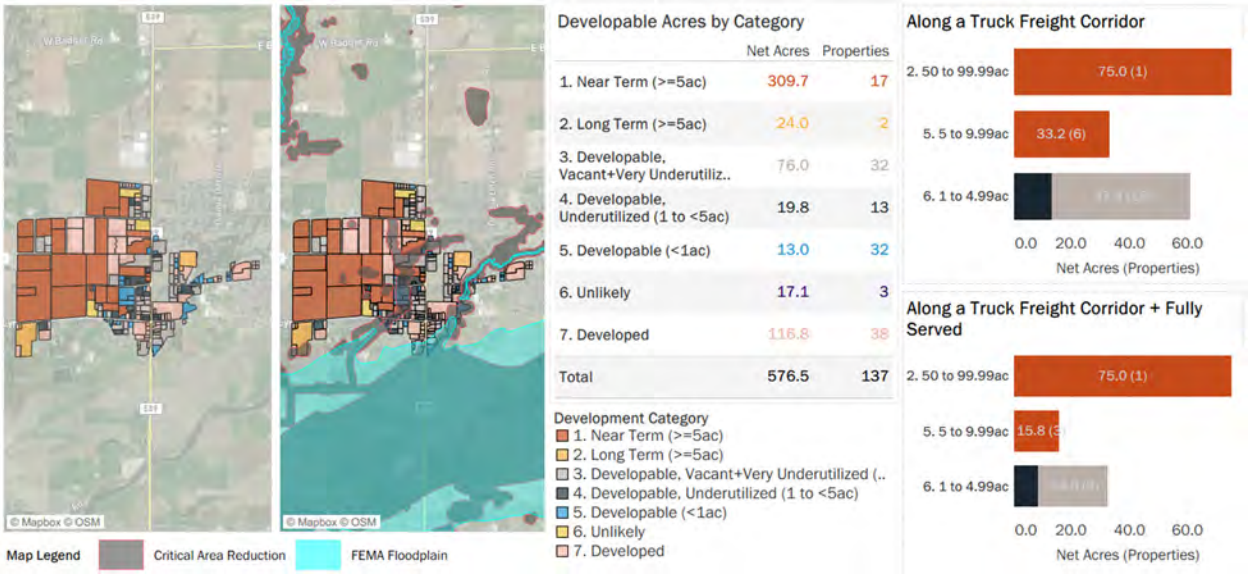
Despite these constraints, the industrial area contains 162.5 net developable acres, excluding developed land and land where development is unlikely. Of this, approximately 132.1 net acres are considered viable for near-term development, contingent on utility extension and floodplain mitigation. One near-term property totaling 13.2 net acres is both fully served by utilities and located along a truck freight corridor. The industrial area is located near State Highway 9, just one minute from the Canadian border unlocking opportunities for businesses that benefit from close proximity to the border. One notable opportunity is the existing racetrack property, which is fully served by utilities. If sold for redevelopment, it could unlock 19 acres of long-term industrial potential.



West Lynden Area

The West Lynden industrial area is located on the west side of Lynden, partially within the Lynden UGA along state highway 539. It contains approximately 458 net developable acres, the majority of which are vacant or underutilized and largely free from wetland and floodplain constraints.

Of the total acreage, 288 net acres—or 63%—are fully served by utilities. In total, 309.7 net acres are considered ready for near-term redevelopment, 217.4 of which are fully served by utilities. Notably, approximately 176.7 of this development-ready land is made up of parcels 10 acres or larger, highlighting the area's strong potential to accommodate larger-scale industrial uses, such as warehousing and light manufacturing, particularly east of the I-5 corridor. Over 90 net acres of near-term development land are located along truck freight corridors. An additional 33 net acres across 15 properties sized between 1 and 4.99 acres are along a truck freight corridor and fully served by utilities.



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