CITY OF ALEXANDRIA, VIRGINIA

INDUSTRIAL USE STUDY

DEPARTMENT OF PLANNING & ZONING

JULY 2015 DRAFT

EXECUTIVE SUMMARY

With planning for Eisenhower West and Oakville Triangle/Route 1 now underway, concerns about the future of the City's industrial areas have begun to arise. What will happen to existing businesses in the industrial areas likely to redevelop? Can and should the City retain I/Industrial zoned land to ensure a diverse tax base and preserve affordable and proximate locations for small businesses and highly valued neighborhood serving businesses? Given that the majority of the City's I/Industrial zoned land is within growth areas near existing and future Metro Stations, it would run contrary to current City policy to preserve it as such. Current policies emphasize transit-oriented developments that maximize the use of public transportation and focuses growth around transportation infrastructure leveraging investment in these areas with the highest and best use. And yet the potential loss of the light industrial users and neighborhood service providers that serve, or are owned by Alexandrians in these areas, as well as retaining appropriate space for businesses that need to locate in industrial space to operate are concerns that should be addressed. This policy balance between industrial development/preservation is not unique to Alexandria; this trend is occurring in cities and jurisdictions regionally, nationally, and internationally.

Staff conducted an Industrial Land Use analysis to assess current conditions citywide with regard to industrial and light-industrial neighborhood serving uses and zoning. The study included two components, an analysis of I/Industrial zoned land in the City, and an analysis of industrial and light industrial businesses/uses citywide. Key findings of the analysis include:

MAJORITY OF BUSINESSES CURRENTLY IN I/INDUSTRIAL ZONE ARE PERMITTED ELSEWHERE: About 77% of the business types currently located within the City's 255 acres of I/Industrial zoned land are permitted in multiple other commercial zones in the City. Of the remaining 23% of the business types that are not permitted in other zones in the City, more than half are auto-related businesses/uses, with other key uses being storage/moving, brewery/beverage, and pet/animal related facilities.

MARKET RENTS AND VACANCY RATES FOR AGING INDUSTRIAL BUILDINGS. I/Industrial zone property rents are significantly lower (at about $9.87 per sq. ft. in Q4 2014)[1] than other commercial rents (ranging from $25-$40 per sq. ft.) in the City, making these properties desirable for entrepreneurs and small businesses who favor flexible space. While these spaces are inexpensive, the City's industrial buildings are on average 50 years old, and market rents are currently insufficient to make investment in a new industrial building financially rewarding, particularly given their metro-proximate locations. In addition, vacancy rates for industrially zoned buildings are at about 11.5% (Q4 2014) and considerably higher compared to industrial buildings in other zones (0.9% in Q4 2014) possibly indicating a decrease in demand for some of these properties, or other factors including the desirability of spaces available, non-renewal of leases, or properties awaiting redevelopment.

PROXIMITY OF INDUSTRIALLY ZONED IN THE REGION: Within a 10 mile radius of the City's boundaries, residents and businesses can access approximately 3,677 acres of industrial land in neighboring Arlington (approximately 141 acres) and Fairfax (over 3,500 acres) Counties.

Consistent with the City's policy to direct redevelopment to areas that are within walking distance of transit, two current planning efforts (Eisenhower West and Oakville Triangle/Route 1) will likely result in rezoning of at least some I/Industrial zoned land, though the potential build-out of these planning efforts will take 15-20 years or longer. However, the findings of this analysis demonstrate that the potential loss of this I/Industrial zoned land should not be cause for significant

1 Data from CoStar, courtesy of AEDP

concern, given the long term nature of plan build out, and the many location options for these light industrial neighborhood-serving uses in commercial zones throughout the City and within close proximity in the region. That said, there are potential next steps that may facilitate the ability of these important neighborhood serving and community enhancing uses to remain in the City. These steps strive to balance the demand for industrial spaces and right-size the amount and mix of uses, effectively targeting desired industrial uses for industrially zoned areas, and supporting the City's goal for a diverse tax base.

1. Potential Zoning Ordinance Changes

The analysis shows that some light industrial uses are only permitted in the I/Industrial zone (and prohibited in all others), which may no longer need to be restricted to that zone given the changing nature of their business. Some examples include craft manufacturing, printing and publishing, and brewery/bottling. These uses, and others which do not pose a harmful impact on adjacent areas, could be added as permitted uses to appropriate commercial zones. This is consistent with changing policy and practice nationwide and in the region, where commercial and main street areas are welcoming the vitality that these uses can provide. In addition, the City could consider an amendment to the I/Industrial zone to remove some currently permitted uses, such as banks or offices, which do not require industrial space (warehouse buildings, flexible use, high ceilings, ability to use heavy or loud machinery) to operate. This would preserve the I/Industrial zone for the uses that require it, thereby limiting competition for this type of space.

2. Small Area Planning

Both the Eisenhower West and Oakville Triangle/Route 1 plans are exploring ways to potentially retain some existing uses, as well as considering tools that establish building parameters that maximize for flexible use as properties redevelop. In addition, these plans can take into account the benefits of regional coordination, including the retention of some existing areas and uses within the City and adjacent counties.

ANALYSIS HIGHLIGHTS

- Since 1992, largely as a result of the City's Comprehensive Master Plan update and subsequent rezoning, the amount of I/Industrial zoned land within the City has decreased from 947 acres to approximately 255 acres. Currently, this equates to approximately 2.6% of the City's total land area. (Map 1).

- The vast majority of the City's remaining I/Industrial zoned land is within close proximity of the City's historic rail corridors, which now correlates with existing and planned Metrorail stations and transit corridors. About half is located within a half mile of existing or planned Metrorail stations.

- Through the Oakville Triangle and Eisenhower West planning processes, an additional 100 acres could potentially be rezoned.

- I/Industrial zoned land within the City represents a small percentage of regional industrially zoned land. Approximately 3,677 acres of industrial land is accessible in adjacent jurisdictions within 10 miles of the City boundary. This includes all of the industrially zoned land in Arlington (approximately 141 acres) and over 3,500 acres in Fairfax County.

- Although the amount of I/Industrial zoned land has decreased over time, many uses once considered "industrial" such as auto repair or catering operations, are now permitted within multiple other commercial zones in the City. And conversely, many of the City's heaviest industrial uses are now located (as non-complying uses) in non-industrial zones. For example, some industrial uses within Eisenhower West such as Covanta and the Ethanol Transloading site, are located within the OCH zone. However, as depicted in Table 1, there are several uses such as bottling plant, manufacturing, printing and publishing, that are only permitted within the I/Industrial zone.

- About 23% of businesses within the industrial zone (41 out of 178 businesses classified) would not be able to locate in other zones of the City. These include general auto repair businesses, storage facilities, and brewery/bottling businesses. Self-storage and other storage buildings/uses currently exist outside of the industrial zone however, many of these uses are non-complying as they were permitted when the properties were previously zoned industrial but no longer comply with subsequent City rezonings. There is also no distinction between warehouse storage and self-storage for the purposes of land use designation.

- The I/Industrial zone and zones such as OCM (100), CG, and CSL contain an eclectic mix of uses, typically uses seeking flex space, low costs, and flexibility in allowed uses per zoning.

- Most of the neighborhood serving light industrial uses now located in I/Industrial zoned areas can be accommodated in other zones, particularly in the CG, CSL, and OCM (100) zones where industrial buildings/uses exist. In addition, since almost half of industrial/flex-space buildings (as classified by CoStar data) are not located within the I/Industrial zone, uses/businesses that utilize these spaces can occur outside of the I-zone

- The City is the largest I/Industrial zoned landowner with approximately 9% (22.3 acres) of the City's total 255 acres of I/Industrial zoned land.

- I/Industrial zone property rents are significantly lower ($9.87 per sq. ft. in 2014) than other commercial rents (ranging from $25-$40 per sq. ft.) and can possibly be attributed in part to the condition and age of industrial buildings and lack of amenities.

- The City's industrial buildings are, on average 50 years old; with the average building built in 1965. Some may be in good condition, while many others

will require significant reinvestment to modernize, which may not occur if market rents for industrial buildings do not justify it.

- Vacancy rates for buildings in the I-/Industrial zone have ranged from 8.7 to 13% in the past 5-10 years, and are currently at about 11.5% on average, possibly indicating a decrease in demand for some of these properties, or other factors including the desirability of spaces available, non-renewal of leases, or properties awaiting redevelopment.

- Market competition is changing the dynamic of many of the City's industrial areas, as many non-industrial uses have begun to take advantage of the lower rents and flexible building type available in I-/Industrial zones. For example, offices, daycare, or fitness facilities can afford to generally pay more rent than a more traditional industrial tenant.

- The lower rents and flexible space afforded by these building types provide opportunities for small(er) businesses, help maintain a diverse economic base, and provide valued services to City residents and businesses.

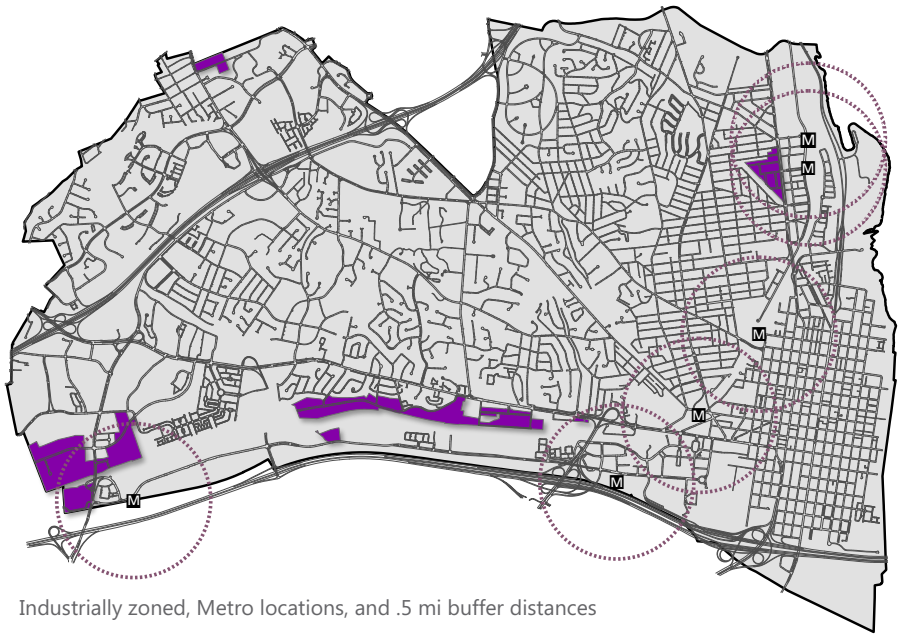
INDUSTRIAL LAND USE ANALYSIS

INTRODUCTION

With planning for Eisenhower West and Oakville Triangle/Route 1 now underway, concerns about the future of the City's industrial areas have begun to arise. What will happen to existing businesses in the industrial areas likely to redevelop? Can and should the City retain I/Industrial zoned land to ensure a diverse tax base and preserve affordable and proximate locations for small businesses and highly valued neighborhood serving businesses? Given that the majority of the City's I/Industrial zoned land is within growth areas near existing and future Metro Stations, it would run contrary to current City policy to preserve it for land uses that are not transit-oriented. The Alexandria Strategic Plan emphasize transit-oriented developments that maximize the use of public transportation and focuses growth around transportation infrastructure leveraging investment in these areas with the highest and best use. And yet the potential loss of the light industrial users and neighborhood service providers that serve, or are owned by Alexandrians in these areas, as well as retaining appropriate space for businesses that need to locate in industrial space to operate are concerns that should be addressed. This policy balance between industrial development/ preservation is not unique to Alexandria; this trend is occurring in cities and jurisdictions regionally, nationally, and internationally.

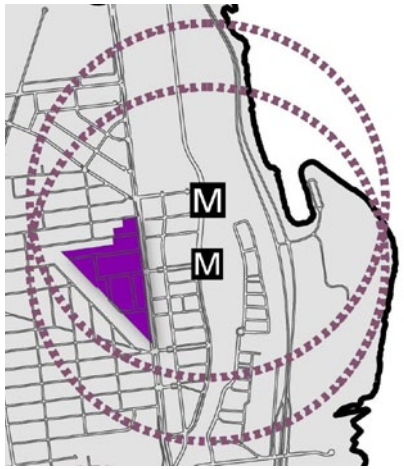
Scope of Study

For the purposes of this study, Staff conducted an analysis of the distribution of I/Industrial zoned parcels in the City, and the types of uses currently occupying parcels within the zone. In addition, Staff analyzed the predominant locations and zones that are home to light industrial and neighborhood serving uses, outside the I/Industrial zone, and assessed the current inventory of properties and uses. A number of factors such as building type, vacancy rates, and uses were also examined. Business license data was used to identify and classify uses within the study areas. The following general classifications were created: Industrial, Auto related, Office, Contracting-Construction, Restaurants, Catering-Food Related, Retail, Wholesale, Fitness, Animal Related, Neighborhood-Personal Services, Storage-Freight-Ship-Moving, and Miscellaneous. To provide context, staff also



Industrially zoned, Metro locations, and .5 mi buffer distances

Industrial land in Eisenhower West Small Area Plan



Industrial land in Oakville Triangle and Route 1 Corridor Plan

compiled a summary of changes to the industrial zone over recent decades, as well as the regional context within which the City's industrial properties fall.

Historical Context

Industrial zones once covered a large portion of the City, including Potomac Yard, the Braddock Metro area, Carlyle and Cameron Station, as well as portions of Old Town and other areas that have since been rezoned and/or redeveloped. Prior to the 1980's, there were two industrial designations: Light Industrial (I-1) and Heavy Industrial (I-2). The I-1 zone permitted manufacturing, warehousing and related uses as well as other uses such as storage yards. The I-2 zone permitted all I-1 uses plus potentially noxious or offensive uses (such as slaughterhouses) with a Special Use Permit. Residential uses were not permitted.

In the 1980s, the two industrial zones were renamed Industrial/planned unit development zones, which allowed the redevelopment of industrial land to residential land. The previously permitted uses could remain, however the planned unit development designation provided density bonuses for the development of industrial areas for non-industrial purposes, encouraging commercial and/or residential development in these areas.

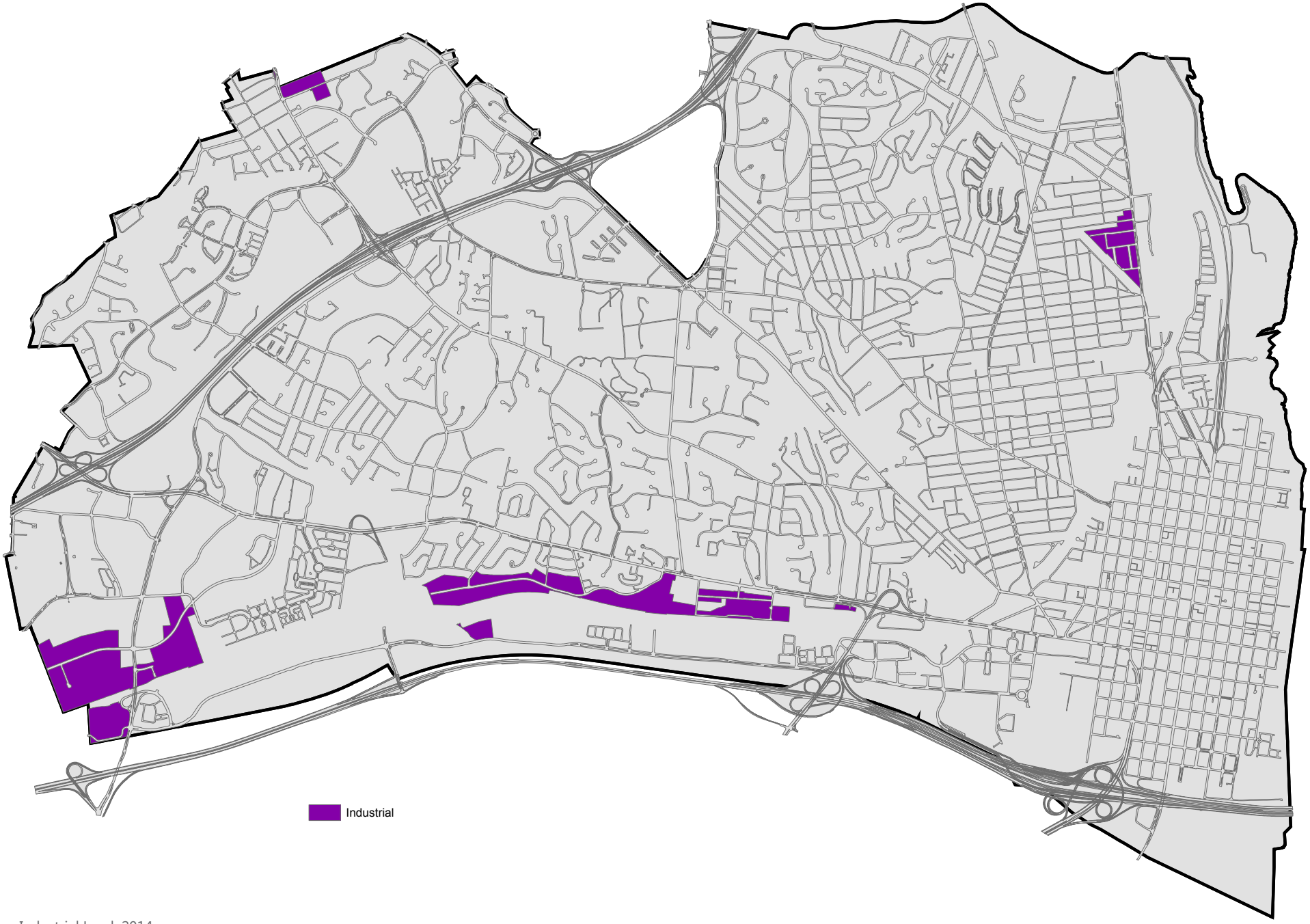
Industrial Land, 1981

In 1992, with the comprehensive master plan update and associated rezoning, the previously held industrial zone designations (I-1 and I-2) were consolidated into a single much smaller zone I/Industrial), with the intent of creating a zone more oriented to service and wholesale uses than to what is traditionally considered heavy industry. The intent of the I/Industrial zone, as defined by the zoning ordinance, is "to provide areas for light to medium industrial use, including service, distribution, manufacturing, wholesale and storage facilities at low densities in areas of the city that would not negatively impact adjacent neighborhoods." Residential uses are prohibited within the I/Industrial zone.

Also in 1992, many industrially zoned properties (I-1 and I-2) were rezoned to other zoning designations including UT/Utility, CL, CSL, and other Office/Commercial zones. For example, the NRG (formerly GenOn) Potomac River Generating Station in Old Town North, previously zoned I-2, was rezoned to UT/Utility.

To demonstrate the scope of change that has occurred over time, the City has rezoned almost 2,000 acres of industrially zoned land since 1974. Between 1974 and 1992, 1,025 acres of industrial land was rezoned. Since the 1992 Comprehensive Master Plan and subsequent rezonings, an additional 690 acres have been rezoned. Map 1: I/Industrial Zone 2014 shows the remaining 255 acres of I/Industrial zoned land in the City. Much of the former industrially zoned land is located within current designated growth areas near Metro Stations that have since been (or are in the process of being) re-planned, including Carlyle, Potomac Yard, Braddock, and Eisenhower West.

Since 1992, the I/Industrial zone has continued to change, allowing many additional uses that were previously restricted. The I/Industrial zone originally prohibited uses such as office, residential or retail to retain the uniqueness of the zone as "industrial." Retail, office and restaurant uses were added as permitted uses or special uses in 1994. Amusement enterprises (movie theaters) and bakeries were added in the late 1990's, and health/athletic clubs, business and professional offices, overnight pet boarding, and numerous administrative uses



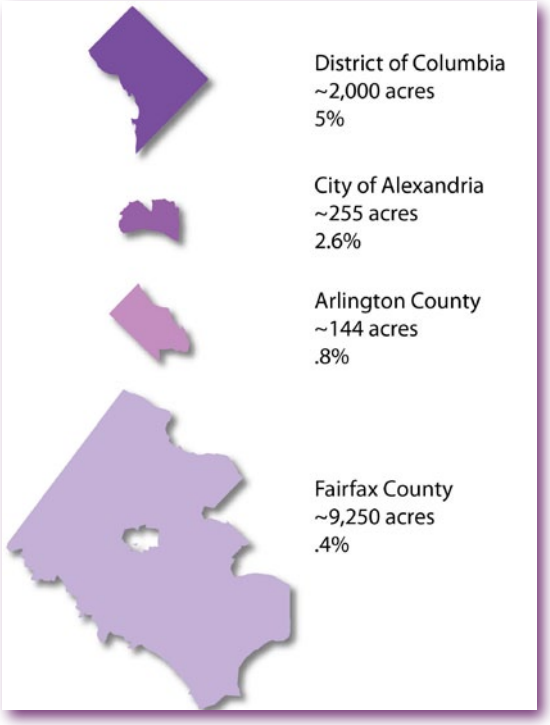
Industrial Land, 2014

were added between 2008 and 2013. See Table 1: Ordinance Revisions Since 1992 and Table 2: Industrial Land Use Ordinance Analysis showing permitted, prohibited, and special uses for zones within the target scope.

Although the zoning designation has changed on many properties, the uses and buildings still retain their industrial character, making some of these uses non-complying based on existing zoning.

Regional Context

From a regional perspective, the City falls within a larger network of industrial zoned land in Fairfax and Arlington Counties, as shown in Map 2: Regional Industrial Zoning. What remains are remnants of the historic patterns of land use. Northeast of the City, the Oakville Triangle and Route 1 properties relate to industrial sites in Arlington (such as the Four Mile Run Sewage Treatment Plant and WMATA bus garage). Along the south and west, properties are located along the Norfolk Southern rail lines, WMATA rail lines and major arterials that connect to points west and south in Fairfax County.

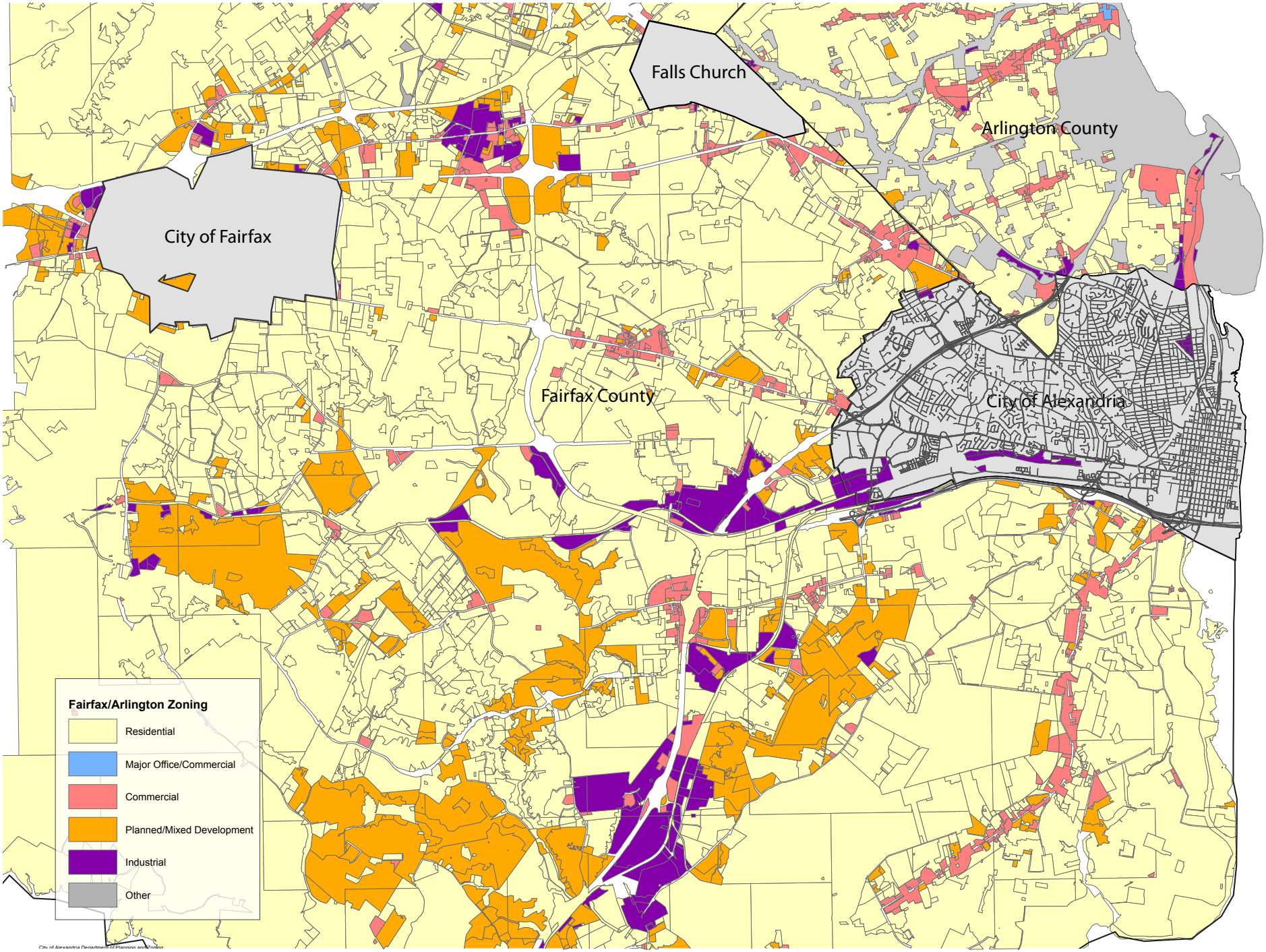


Of the 4 jurisdictions, Fairfax County has the most industrial zoned land (acreage-wise) by a wide margin however, comprising about .4% of County land. Washington DC has about 5% as indicated in the Ward 5 Works Industrial Study released in August 2014. Arlington has about .8% of the County's land area, compared to Alexandria, which has 2.6%. While the percentage of industrially zoned land in neighboring counties appears very small, the percentages are based on total land area of each county, of which both are considerably larger than Alexandria. There are approximately 3,677 acres of industrial land accessible in adjacent jurisdictions within 10 miles of the City boundary, including all of the industrially zoned land in Arlington (approximately 141 acres) and over 3,500 acres in Fairfax County.

From a classification perspective, the two neighboring counties categorize their Industrial land more finely. Arlington utilizes two classifications, Light Industrial and Service Industrial, and Fairfax County has a far more detailed classification system with 7 different classifications ranging from Office and Research to Heavy Industrial.

In their 2013 Comprehensive Plan, Fairfax County recommended limiting future office and non-industrial uses in industrially zoned areas to those that are ancillary to an industrial use. This is recommended to ensure compatibility of industrial land and uses. Arlington County in their 2000 Industrial study indicated the County could function effectively with no industrial uses remaining however noting potential increases in delivery and service turnaround times. The study indicated that some uses such as warehousing, wholesale distribution and research and development provide convenient access to businesses and residents but anticipated that it may not be possible to provide for these uses as competing policies and development pressure continue for many of their industrial sites. Arlington County is expected to begin a planning process in spring 2015 for a Shirlington Crescent-Four Mile Run Area Plan which will explore future uses within a highly industrially zoned area. Some preliminary thoughts include preserving some industrial land for acquisition by the County for the future provision of municipal services.

In the 2014 Ward 5 Works Industrial Study, the District of Columbia envisions redevelopment and revitalization of industrial areas within Ward 5 (where the highest concentration in the District is located) with an emphasis on working within the parameters of existing zoning to



Regional Industrial Land

retain and promote PDR (Production, Distribution, and Repair)-related industries and "maker spaces" while accommodating mixed-use redevelopment. The Plan is currently in the early stages of implementation.

Both Washington, DC and Fairfax County's industrial land use policies indicate a desire to preserve areas of industrially zoned land for the provision of municipal services in the near or distant future. Additionally, in these two jurisdictions, the municipalities are land owners of much of the industrial land they seek to preserve. This is particularly different in Alexandria where the land that service municipal functions was rezoned from I/Industrial to UT/Utility with the 1992 Comprehensive Master Plan Update and the necessity to preserve industrial land for municipal functions is further reduced.

Nationally, there has been a decline in industrial sectors and a continued shift to service-based economy. While this sector of the economy has declined in recent years, an emerging "maker" and innovation economy is becoming an important and valued sector in many cities. Maker businesses/uses include small-scale production industries that vary from engineering and technology-oriented industries to traditional craft and trades. This sector of the economy is generally comprised of small businesses/entrepreneurs, who utilize industrial land for the lower market rents, and flexibility in use and spaces. Cities currently implementing production, distribution, repair (PDR) or "maker" space retention/revitalization policies include New York City, NY (Engines of Opportunity Study, November 2014), Washington, DC (Ward 5 Works, August 2014), City of Berkeley, CA (West Berkeley Plan, 1993), and numerous others nationally and internationally.

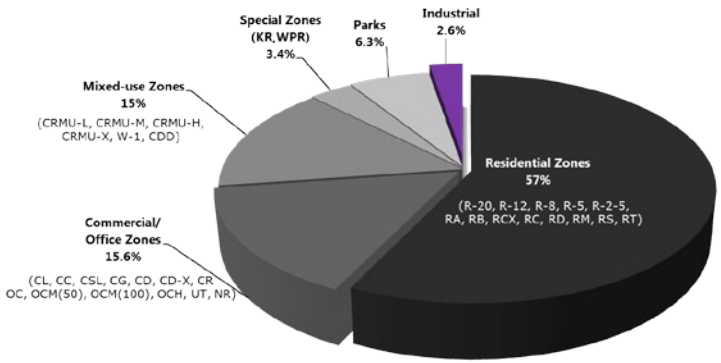
Image 1: Mixed use development integrated with light industrial uses. Vancouver, British Columbia, Canada

Image 2: Fuel service station integration with redevelopment. Washington, DC

CITY OF ALEXANDRIA INDUSTRIAL DATA & FINDINGS

Land Area

I-Industrial zoned land in the City comprise about 255 acres or about 2.6% of total land area as seen below in Chart 1: Citywide Land Use Composition (2014). The assessed value of these properties is approximately $271 million (land value only) based on Real Estate Assessment.



The City is the largest industrial landowner with approximately 10% of all I/Industrial zoned land, which equates to approximately 22.3 acres, not including land for split-zoned parcels with I and POS designations. With these portions included, the City owns well over 1 million sq. ft. of I/Industrial zoned property. This includes nine properties along Wheeler Avenue, Colvin Street, and Business Center Drive, home to government offices, maintenance facilities, a fueling station, and the Police Department Headquarters.

In addition to the City, there are a handful of other large industrial landowners, including, Wheeler Avenue (Duke Shirley, LLC), Vulcan, Blackstone (Oakville), and Lane Construction (Virginia Paving). See Table 3: Major Land Owners of Industrial Properties and Map 13.

Buildings

Alexandria's industrial buildings are no longer solely located within the I/Industrial zone. Areas containing industrial warehouses such as the Braddock Metro area, properties along Duke Street and Eisenhower Avenue, and within the West End, were rezoned from industrial years ago, however, the industrial buildings (and often light industrial uses) on many of these sites remain.

Industrial buildings vary by type, ranging from warehouses to flex space buildings that can support service, light industry, heavy industry, and a variety of small businesses. The median size of industrial buildings in Alexandria is approximately 30,000 sq. ft. The two main classifications of industrial buildings are flex space and general industrial buildings.

The primary building type located on industrial parcels are multi-tenant warehouse spaces constructed between the 1960s and 1970s. The City's industrial buildings are, on average 50 years old; with the average building built is 1965. Some may be in good shape while many others will require significant reinvestment to modernize, which may not occur if market rents for industrial buildings do not justify it. With the exception of two City projects (the Animal Shelter and Police Station), no new major construction has occurred within the Industrial zone since the late 1980s.

Buildings on I/Industrial zone properties amount to approximately 6 million sq. ft. and about $221.4 million in assessed value, of which City-owned buildings amount to almost $96 million. Excluding City owned properties, the land value of I/Industrial zone properties is typically worth more than the buildings/site improvements, indicating redevelopment potential.

Industrial Lease and Vacancy Rates and Employment

- Alexandria Economic Development Partnership (AEDP) reported 132 properties with industrial buildings within the City. Of the 132 properties, 75 are zoned I/Industrial and 57 are located in other zones such as CG, CSL, OCH, W-1, RG, CG, CL, OCM(50), and other commercial and residential zones.

- For all properties with industrial buildings, average lease rates steadily increased from 2009 to 2011, from $9.77/sq. ft. and peaking at $11.25/sq. ft. Since that time, average lease rates have gone back down to $9.78/sq.ft., and are currently at the lowest rate since 2008. For the I/Industrial zoned properties (75 properties), lease rate trends have shown consistent with the larger reporting data, which may indicate that the zoning designation is not a factor.

- Vacancy rates have increased from 2005 to 2014, for a total of almost 4 points, with 2014 having the highest vacancy rate at about 10%. Between 2010 and 2014, the percent of vacancies has been the highest during the reporting period, between 7 – 10% for all 132 properties.

- Unlike lease rates for I/Industrial zoned properties that stayed fairly consistent with the overall trends reported for 132 properties with industrial buildings, vacancy rates for the 75 I/Industrial zoned properties were much higher than non-industrially zoned properties; between 8-13% vacant for I/Industrial zoned properties, compared to 2-6% vacancies for the 57 non-industrially zoned properties during reporting periods 2010 to 2014.

- Overall, declining lease rates and increasing vacancy rates may indicate a slight decrease in demand for these properties, and perhaps a decrease in demand for I/Industrial properties as seen in the lower vacancy rates for non-industrially zoned properties. However, in this case, the higher vacancy rates may not necessarily indicate low demand for industrial but rather that the type of industrial use/space most desirable may not be available, and/or that the vacancy is due to redevelopment plans. Anecdotally, the level of inquiries about available industrial properties in the City appears to have remained consistent.

EMPLOYMENT

- In terms of employment generation, at this level of analysis it is not possible to quantify the number of jobs produced by businesses solely within the I/Industrial zone. However, the analysis looked at five employment sectors generally located within the industrial zone; these include construction, manufacturing, wholesale trade, waste management and remediation, and repair/service related sectors. According to the most recent report from the Virginia Employment Commission (Quarterly Census of Employment and Wages, which covers the 2nd quarter of 2014), these sectors account for approximately 6,000 jobs or about 6.3% of total employment within the City.

- Although some of these jobs are produced by businesses/uses within the I/Industrial zone, employment data here is indicative of all jobs produced by these 5 sectors across all zones within the City, not just industrially zoned land and provides a baseline of understanding the impact these employment sectors play in the overall economy of the City.

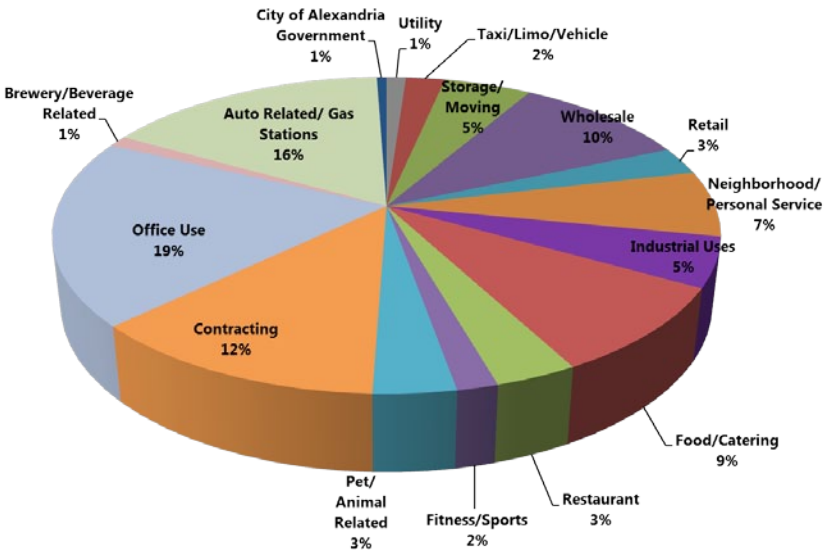
Uses Located in Industrial Zone

As mentioned, many uses that were previously prohibited in the I/Industrial zone are now allowed, including office, retail, health and athletic clubs, business and professional offices, and numerous administrative uses. See Table 1: Ordinance Revisions to I/Industrial Zone Since 1992. In addition, uses previously exclusive to the I/Industrial zone are now allowed in other commercial and office zones (either by right or with an SUP). Essentially, this has allowed for many "light industrial" uses, service and warehouse uses to occur in zones throughout the City. There are a limited number of uses that are exclusive to the I/Industrial zone (See Table 4:Uses Allowed Only in the I/Industrial Zone). Many of the existing heavy industry uses identified can only operate on I-Industrial zoned land.

The 1992 comprehensive rezoning/reassignment of large tracts of industrial properties to other designations have also dispersed industrial uses in a wide area not zoned Industrial. For example, the Covanta Energy from Waste facility and the Norfolk Southern Ethanol Transloading Facility prior to 1992 were zoned Industrial. The properties are currently zoned OCM (100) and UT/Utility, respectively.

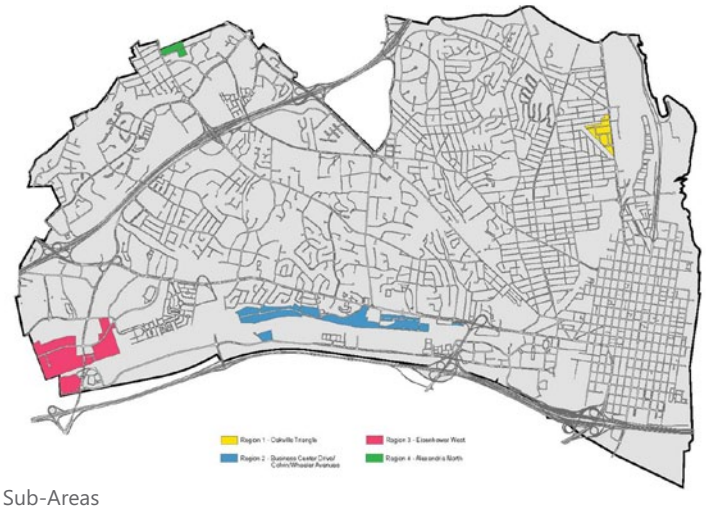
For a breakdown of uses currently located within the I/Industrial Zone, see Chart 2: Uses in I-Industrial Zone (2014) below. Key highlights include:

- Heavy industry comprises one of the smallest percentages of businesses –about 5%
- Office has the highest percentage at 19%, followed by auto related uses at 16%
- Contractor/construction related businesses, wholesale retailers, and food/catering related businesses were next among highest use at 12%, 10%, and 9%, respectively.



Industrial Sub areas

There are three main industrial sub areas in the City as shown in Map 1-1: Industrial Sub Areas.



Industrial Sub-Areas

EISENHOWER WEST

- The Eisenhower West area is the largest I/Industrial area in the City at over 100 acres, and is located within the Eisenhower West Planning Area.
- The Eisenhower West Area has the largest concentration of heavy industrial uses in the City including Virginia Paving, Vulcan Materials, Covanta Waste to Energy Facility, and the Norfolk Southern Ethanol Transloading Facility, all of which are in close proximity to the Van Dorn Metro Station and the future West End Transitway. Of these, only Virginia Paving and Vulcan are still zoned I/Industrial. Covanta is zoned OCM(100) but will remain in industrial use through 2038. The Ethanol Transloading site is zoned UT.
- Most of the light industrial uses are located closer to South Pickett and South Van Dorn Streets (not Eisenhower Avenue), and are also proximate to Metro/rail lines, and are consistent with other industrial uses immediately adjacent in Fairfax County.

- Apart from the heavy industry users, the primary uses in the area are office uses, wholesale retailers, and auto related uses, with the majority located in industrial/flex warehouse type buildings.

BUSINESS CENTER DRIVE/COLVIN AND WHEELER AVENUES

- Almost a quarter of the uses within this area are office uses. Contractor and construction related uses, auto related, and food/catering related industries comprised the next highest users.

- The City of Alexandria and Wheeler Ave Properties (Duke Shirley LLC) are the two major land owners within this region. See Table 3: Major Land Owners of Industrial Properties and Map 13.

- The City owns 10 properties in the area, including government offices, maintenance facilities, fueling station, and the Police Headquarters, totaling almost $96 million in building value of the combined properties.

- Properties within this area are proximate to the future Corridor B Transitway Planning Area.

OAKVILLE TRIANGLE

- The Oakville Triangle area includes approximately 13 acres of I/Industrial zoned land.

- Oakville Triangle is located within ½ mile walking distance of the future Potomac Yard Metro Station and is directly adjacent to the new Route 1 Transitway.

- The predominant use within this sub area is auto-related, followed by food/catering industries, retail wholesalers, industrial printing, and neighborhood serving uses. In contrast, while storage businesses are among the smallest number of business users in the area, this use occupies more than 1/3 of the building area within the site.

- Buildings within the Triangle are typically 1-to 2-story buildings and tend to be several decades old with a median building age of 50 years. Within the Triangle, parcel size varies. Large parcels of several acres are joined by many smaller lots of less than 5,000 square feet. There has no redevelopment within Oakville in recent years, only adaptive reuse of existing buildings.

Uses Located in Other Zones

To present a comprehensive discussion of industrial, light industrial and service uses in the City, staff expanded the analysis beyond the I/Industrial zone designation to include zoning classifications that allow for light industrial/service/auto related uses. See Map 3: Other Target Areas for areas studied, and Table 5, showing the number of businesses for each use within the target areas. Parcels with the following designations were analyzed:

- CC, CDX, CG, CL, CSL, OCH, OCM(50), OCM(100), and NR.

HIGHLIGHTS:

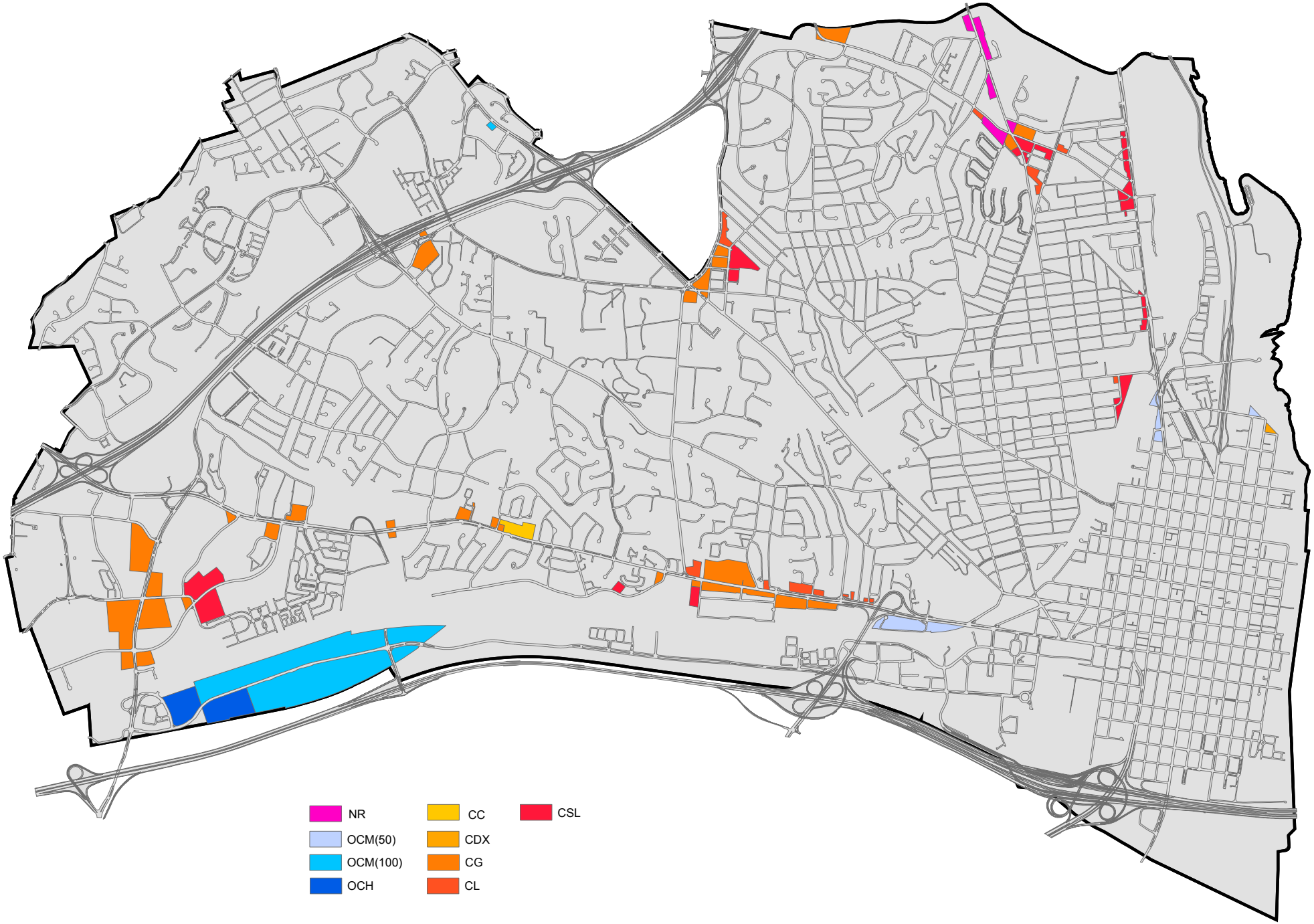
- The CG, CSL, and OCM(100) zones have many of the same uses as those found in the Industrial zone.

- Auto related uses (auto repair, service stations, gas stations, car dealership, etc.) along with office use were the most prevalent uses in the CSL zones at 25% each.

- While the CL zone lists a high number of business/office uses, the majority of those were professional neighborhood serving offices (doctors, dentists, lawyers, etc.).

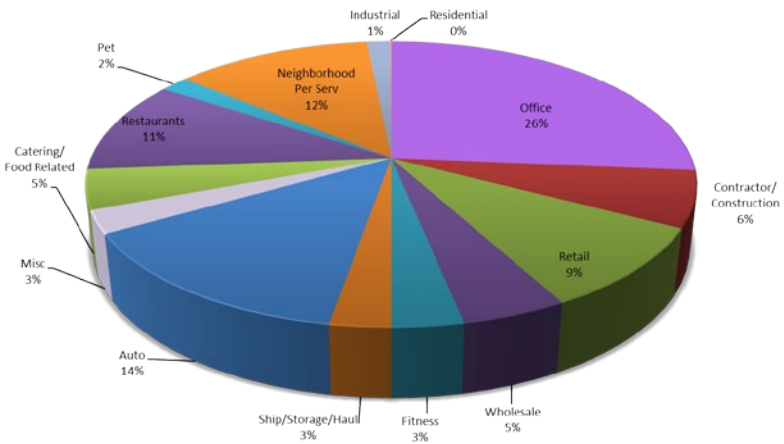
- CG properties showed some of the highest retail and auto-related usage of all the zones.

- The OCM(100) zone parcels were zoned I-2 industrial prior to 1992, and show distinct similarity to the industrial zone as far as nature of businesses and uses identified.



Industrial Use Target Areas

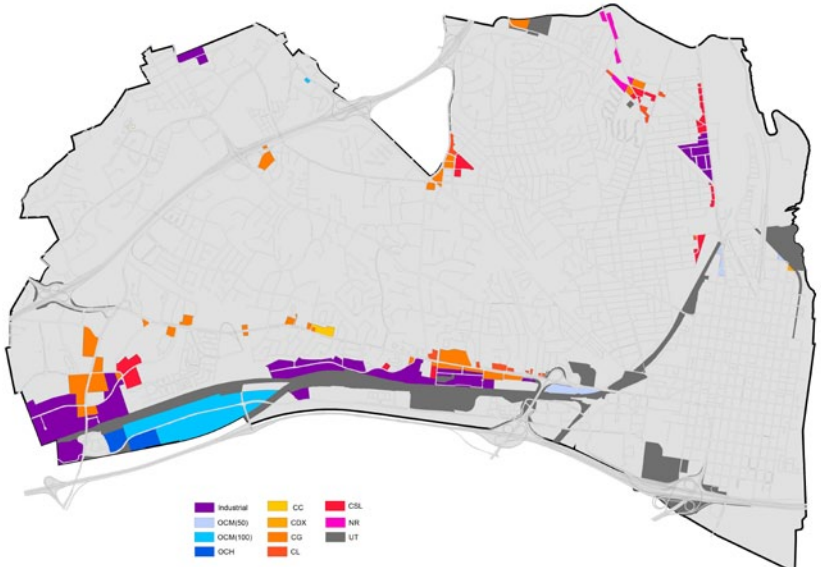
- Chart 3: Businesses in Target Areas illustrates the distribution of uses for all the zones studied. Office uses are the largest reported uses followed by auto related uses, followed by neighborhood personal services and retail.



- The UT/Utility zone includes industrial uses and can be found throughout the City predominantly along rail lines. See Map 5: Industrial Analysis Target Areas Including Utility Zoning. Among these uses are the NRG site, Alex Renew (ASA) Water Treatment facilities, DASH and WMATA facilities and storage yards, Virginia American Water facilities, and VA Electric and Power Company.

- About 23% of businesses within the I/Industrial zone (41 out of 178 businesses classified) would not be able to locate in other zones of the City , including general auto repair businesses, storage facilities, and brewery/ bottling businesses. Self-storage and other storage buildings/uses currently exist outside of the industrial zone however, many of these uses are currently non-complying as they were permitted when the properties were previously zoned industrial but no longer comply with subsequent City rezonings. Additionally, there is also no distinction between warehouse storage and self-storage for the purposes of land use designation. Potential rezonings of these properties will either make these sites non-complying, or limit the potential for these uses in the City in the future.

Industrial Analysis Target Areas Including Utility Zoning

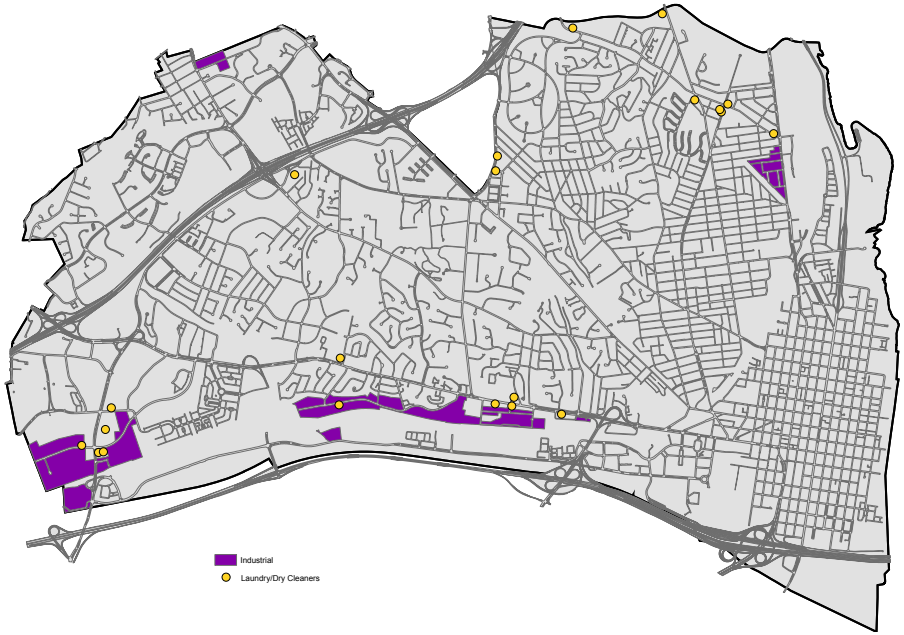


NEIGHBORHOOD SERVING USES

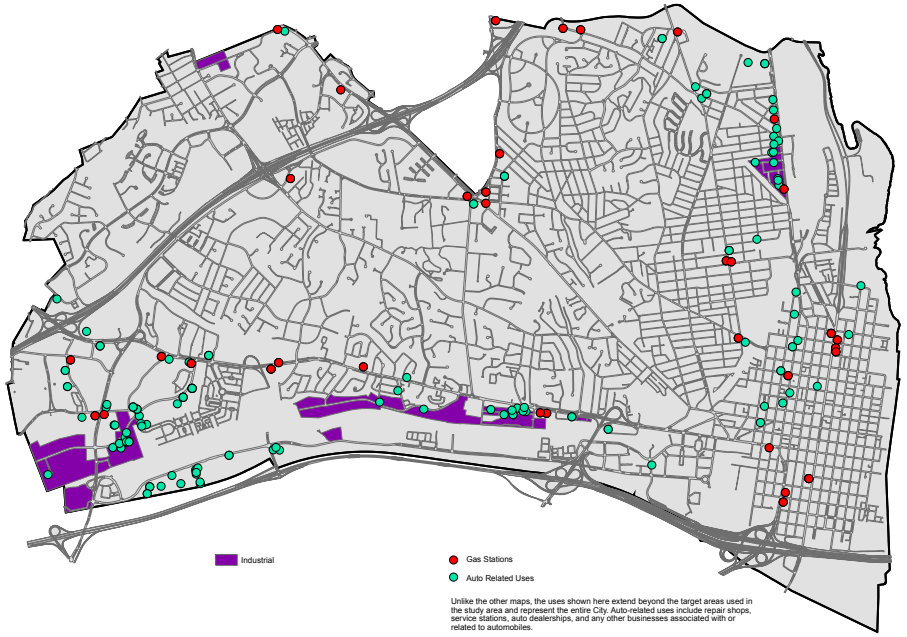
- Generally, while auto related uses are one of the more highly represented uses within the I/Industrial zone, they are also dispersed throughout the City and are not exclusive to the I/Industrial zone (See Map 8: Gas Station, Auto Related Uses Citywide). The map shows the location of auto related uses throughout the entire City not just the target areas analyzed.

- Other neighborhood and personal serving uses such as laundry/dry cleaners, florists, personal service uses and fitness/sports related uses are primarily located outside of I/Industrial zoned properties (See Map 9: Target Area Uses and Industrial Zones).

Industrial Analysis Target Areas Including Utility Zoning

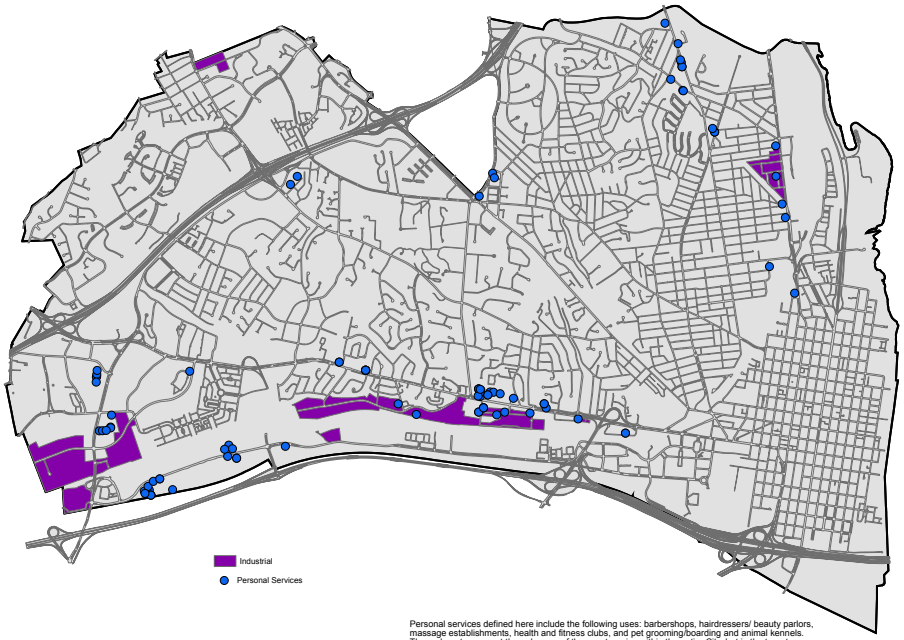


Industrial Analysis Target Areas Including Utility Zoning



Unlike the other maps, the uses shown here extend beyond the target areas used in the study area and represent the entire City. Auto-related uses include repair shops, service stations, auto dealerships, and any other businesses associated with or related to automobiles.

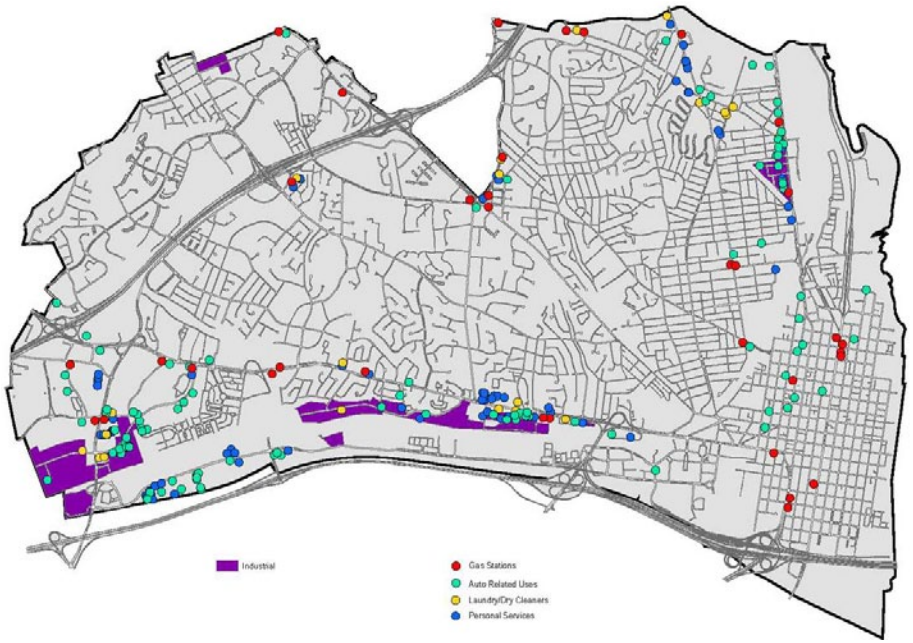
Industrial Analysis Target Areas Including Utility Zoning

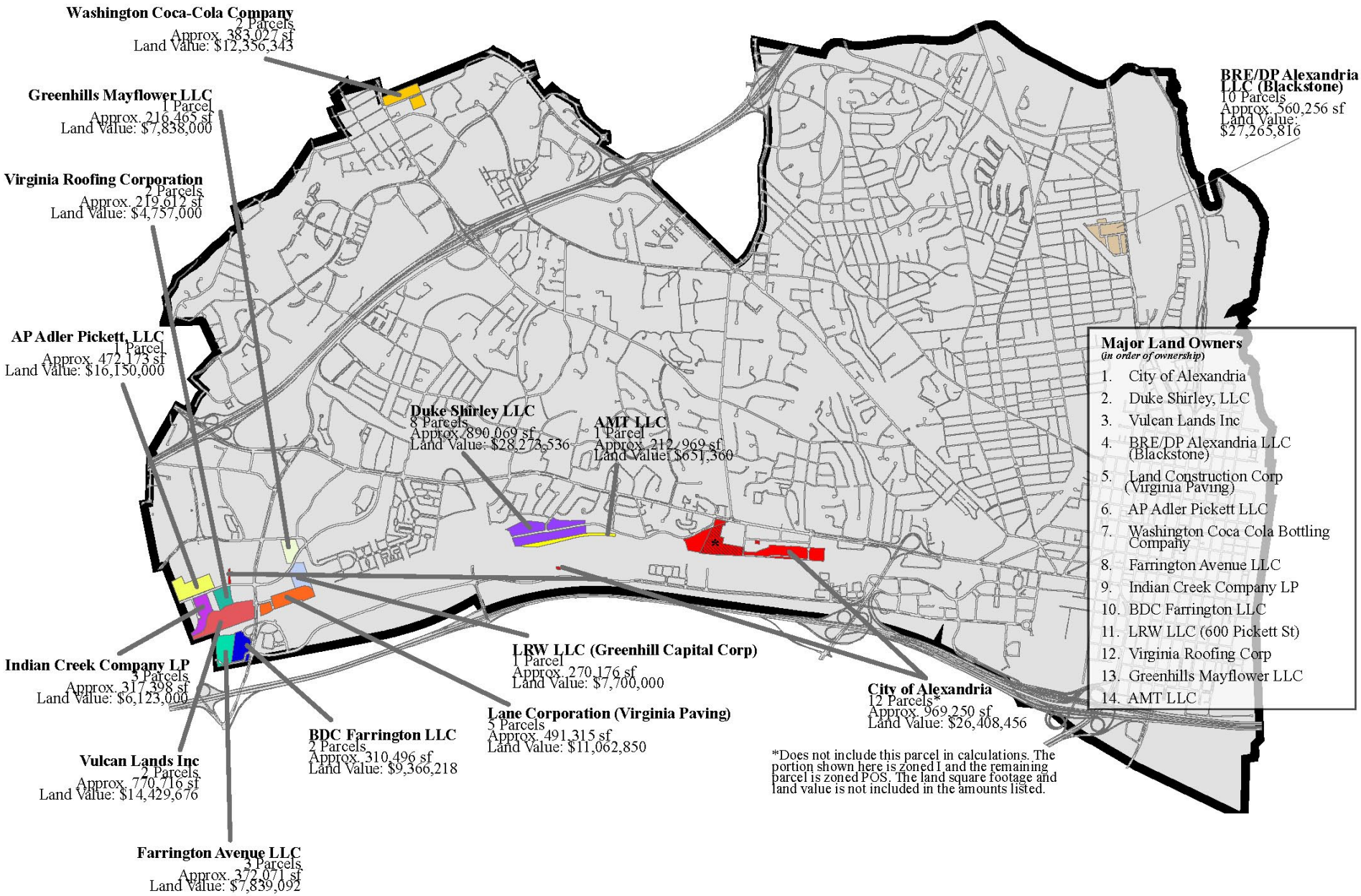


Personal Service Uses with Target Areas Only

Personal services defined here include the following uses: barbershops, hairdressers/ beauty parlors, massage establishments, health and fitness clubs, and pet grooming/boarding and animal kennels. These do not represent the only uses of these categories within the entire City, but in the target areas identified as part of this study.

Industrial Analysis Target Areas Including Utility Zoning





Industrial Analysis Target Areas Including Utility Zoning

KEY FINDINGS AND RECOMMENDATIONS

PROXIMITY OF INDUSTRIALLY ZONED IN THE REGION: Within a 10 mile radius of the City's boundaries, residents and businesses can access approximately 3,677 acres of industrial land in neighboring Arlington (approximately 141 acres) and Fairfax (over 3,500 acres) Counties.

MAJORITY OF BUSINESSES CURRENTLY IN I/INDUSTRIAL ZONE ARE PERMITTED ELSEWHERE: About 77% of the business types currently located within the City's 255 acres of I/Industrial zoned land are permitted in multiple other commercial zones in the City. Of the remaining 23% of the business types that are not permitted in other zones in the City, more than half are auto-related businesses/uses, with other key uses being storage/moving, brewery/beverage, and pet/animal related facilities.

MARKET RENTS AND VACANCY RATES FOR AGING INDUSTRIAL BUILDINGS. I/Industrial zone property rents are significantly lower (at about $9.87 per sq. ft. in Q4 2014) than other commercial rents (ranging from $25-$40 per sq. ft.) in the City, making these properties desirable for entrepreneurs and small businesses who favor flexible space. While these spaces are inexpensive, the City's industrial buildings are on average 50 years old, and market rents are currently insufficient to make investment in a new industrial building financially rewarding, particularly given their metro-proximate locations. In addition, vacancy rates for industrially zoned buildings are at about 11.5% (Q4 2014) and considerably higher compared to industrial buildings in other zones (0.9% in Q4 2014) possibly indicating a decrease in demand for some of these properties, or other factors including the desirability of spaces available, non-renewal of leases, or properties awaiting redevelopment.

Consistent with the City's policy to direct redevelopment to areas that are within walking distance of transit, two current planning efforts (Eisenhower West and Oakville Triangle/Route 1) will likely result in rezoning of at least some I/Industrial zoned land, though the potential build-out of these planning efforts will take 15-20 years or longer. However, the findings of this analysis demonstrate that the potential loss of this I/Industrial zoned land should not be cause for significant concern, given the long term nature of plan build out, and the many location options for these light industrial neighborhood-serving uses in commercial zones throughout the City and within close proximity in the region. That said, there are potential next steps that may facilitate the ability of these important neighborhood serving and community enhancing uses to remain in the City. These steps strive to balance the demand for industrial spaces and right-size the amount and mix of uses, effectively targeting desired industrial uses for industrially zoned areas, and supporting the City's goal for a diverse tax base.

POTENTIAL ZONING ORDINANCE CHANGES

The analysis shows that there are some light industrial uses only permitted in the I/Industrial zone (and prohibited in all others) which may no longer need to be restricted to that zone given the changing nature of their business. Some examples include craft manufacturing, printing and publishing, and brewery/bottling. These uses, and others which do not pose a harmful impact on commercial areas, could be added as permitted uses to appropriate commercial zones. This is consistent with changing policy and practice nationwide and in the region, where commercial and main street areas are welcoming the vitality that these uses can provide.

SMALL AREA PLANS

Both the Eisenhower West and Oakville Triangle/Route 1 plans are exploring ways to potentially retain some existing uses, as well as considering tools that establish building parameters that maximize for flexible use as properties redevelop. In addition, these plans can take into account the benefits of regional coordination, including the retention of some existing areas and uses within the City and adjacent counties.

TABLE 1: ORDINANCE REVISIONS TO I/INDUSTRIAL ZONE SINCE 1992

1992 – Ordinance No. 3606
- Special Uses added
  - *Fuel Yard*

1994 – Ordinance No. 3612
- Permitted Uses added
  - *Retail*
- Special Uses added
  - Modified Business Offices (*Business offices other than those listed in § 4-1202(F)*
  - Restaurant

1997 – Ordinance No. 3912
- Permitted Uses added
  - *Motor vehicle parking or storage for 20 vehicles or fewer*
- Special Uses added
  - *Motor vehicle parking or storage for more than 20 vehicles*

1999 – Ordinance No. 4049
- Special Uses added
  - *Day labor agency*

2004 – Ordinance No. 4328
- Special Uses added
  - *Day labor agency*

2008 – Ordinance No. 4573
- Permitted Uses added
  - *Restaurant located within a shopping center or hotel*; Added *Retail*
- *Administrative Special Uses* added
- Special Uses added
  - *Outdoor food and crafts market, other than pursuant to section 4-1202.2*

2009 – Ordinance No. 4576
- Permitted Uses added
  - *Public Recycling Center*

2010 – Ordinance No. 4677
- Permitted Uses added
  - *Personal service (includes small schools)*
  - *Health and athletic club*
  - *Business or professional offices*
  - *Light assembly/crafts*
- Administrative Special Uses added
  - *Massage establishment*
  - *Valet parking*
  - *Outdoor dining*

2013 – Ordinance No. 4791
- Administrative Special Uses added
  - *Day care center*
  - *Private School, academic or commercial, with more than 20 students on the premises at any one time.*

TABLE 2: INDUSTRIAL LAND USE ORDINANCE ANALYSIS

Use	I	CL	CC	CSL	CG	CD	CDX	CR	OC	OCM(50)	OCM(100)	OCH
Ambulance Service	Permitted	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited
Animal shelter or kennel	Permitted	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited
Automobile service station	Permitted	Prohibited	Administrative or SUP	Administrative or SUP	Administrative or SUP	Prohibited	Prohibited	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP	*
Bottling plant	Permitted	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited
Building materials storage or sales	Permitted	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited
Catering operation	Permitted	Prohibited	Prohibited	Administrative or SUP	Prohibited	Administrative or SUP	Administrative or SUP	Prohibited	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP
Drive through facility	Permitted	Prohibited	Administrative or SUP	Administrative or SUP	Administrative or SUP	L	Prohibited	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP
Funeral home	Permitted	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP	Prohibited	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP
Glass shop	Permitted	Prohibited	Prohibited	Administrative or SUP	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited
Health and athletic club	Permitted	Prohibited	Prohibited	Prohibited	Administrative or SUP	Administrative or SUP	Administrative or SUP	Permitted	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP
Ice and cold storage facility	Permitted	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited
Laundry, dry cleaning operation	Permitted	Prohibited	Prohibited	Administrative or SUP	Administrative or SUP	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited
Light automobile repair	Permitted	Prohibited	Administrative or SUP	Administrative or SUP	Administrative or SUP	Prohibited	Prohibited	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP	*
Light assembly, service and crafts	Permitted	Prohibited	Prohibited	Administrative or SUP	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited
Machine shop	Permitted	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited
Manufacturing	Permitted	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited
Medical laboratory	Permitted	Permitted	Permitted	Permitted	Permitted	Permitted	Permitted	Prohibited	Permitted	Permitted	Permitted	Permitted
Motor vehicle parking < 20 vehicles	Permitted	Permitted	Permitted	Permitted	Permitted	Permitted	Permitted	Permitted	Permitted	Permitted	Permitted	Permitted
Parcel delivery	Permitted	Prohibited	Prohibited	Administrative or SUP	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited
Personal service establishment	Permitted	Permitted	Permitted	Permitted	Permitted	Permitted	Permitted	Permitted	Permitted	Permitted	Permitted	Permitted
Pet supplies, grooming, training	Permitted	Permitted	Administrative or SUP	Permitted	Permitted	Permitted	Permitted	Prohibited	Permitted	Permitted	Permitted	Permitted
Printing and publishing	Permitted	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited
Radio or TV broadcasting	Permitted	Prohibited	Prohibited	Prohibited	Prohibited	Permitted	Permitted	Prohibited	Permitted	Permitted	Permitted	Permitted
Research and testing laboratory	Permitted	Prohibited	Prohibited	Administrative or SUP	Prohibited	Prohibited	Prohibited	Prohibited	Administrative or SUP	Administrative or SUP	Administrative or SUP	Prohibited
Restaurant located in a shopping center	Permitted	Permitted	Permitted	Permitted	Permitted	Permitted	Permitted	Permitted	Permitted	Permitted	Permitted	Permitted
Retail up to 20,000 gross sf	Permitted	Permitted	Permitted	Permitted	Permitted	Permitted	Permitted	Permitted	Permitted	Permitted	Permitted	Permitted
Sheet metal shop	Permitted	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited
Stone monument works	Permitted	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited
Storage building/ warehouse	Permitted	Prohibited	Prohibited	L	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited
Utilities	Permitted	Permitted	Permitted	Permitted	Permitted	Permitted	Permitted	Permitted	Permitted	Permitted	Permitted	Permitted
Wholesale business	Permitted	Prohibited	Prohibited	Administrative or SUP	Prohibited	Administrative or SUP	Administrative or SUP	Prohibited	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP
Accessory uses per 7-100	Permitted	Permitted	Permitted	Permitted	Permitted	Permitted	Permitted	Permitted	Permitted	Permitted	Permitted	Permitted
Public recycling center	Permitted	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited

Uses	I	CL	CC	CSL	CG	CD	CDX	CR	OC	OCM(50)	OCM(100)	OCH
Asphalt plant	Administrative or SUP	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited
Amusement enterprise	Administrative or SUP	Prohibited	Prohibited	Prohibited	Administrative or SUP	Administrative or SUP	Administrative or SUP	Permitted	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP
Automobile/trailer rental or sales	Administrative or SUP	Prohibited	Prohibited	Administrative or SUP	Administrative or SUP	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited
Bus shelter	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP
Business or **professional office** other than 4-1202F	Administrative or SUP	Permitted	Permitted	Permitted	Permitted	Permitted	Permitted	Prohibited	Permitted	Permitted	Permitted	Permitted
Concrete mixing or batching plant	Administrative or SUP	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited
Convenience store	Administrative or SUP	Prohibited	Administrative or SUP	Administrative or SUP	Administrative or SUP	Prohibited	Prohibited	Prohibited	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP
Day care center	Administrative or SUP	Permitted	Permitted	Permitted	Permitted	Permitted	Permitted	Permitted	Permitted	Permitted	Permitted	Permitted
Day labor agency	Administrative or SUP	Administrative or SUP	Prohibited	Administrative or SUP	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited
Freight distribution center	Administrative or SUP	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited
Feul yard	Administrative or SUP	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited
General automobile repair	Administrative or SUP	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited
Helistop	Administrative or SUP	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited
Homeless shelter	Administrative or SUP	Prohibited	Prohibited	Prohibited	Prohibited	Administrative or SUP	Administrative or SUP	Prohibited	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP
Hospital	Administrative or SUP	Prohibited	Prohibited	Prohibited	Administrative or SUP	Administrative or SUP	Administrative or SUP	Prohibited	Administrative or SUP	Administrative or SUP	Administrative or SUP	Permitted
Interstate bus station	Administrative or SUP	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP
Junkyard	Administrative or SUP	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited
Massage establishment	Administrative or SUP	Administrative or SUP	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Administrative or SUP
Medical care facility	Administrative or SUP	Prohibited	Prohibited	Prohibited	Administrative or SUP	Administrative or SUP	Administrative or SUP	Prohibited	Administrative or SUP	Administrative or SUP	Administrative or SUP	Permitted
Motor vehicle parking > 20 vehicles	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP	Permitted	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP
Motor vehicle storage yard	Administrative or SUP	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Permitted	Prohibited	Prohibited	Prohibited	Prohibited
Outdoor garden center	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP
Outdoor food and crafts market	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP	Prohibited	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP
Outdoor dining	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP
Overnight pet boarding if located in shopping center	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP
Private school > 20 students	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP
Public building	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP	Prohibited	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP
Recycling/recovery facility	Administrative or SUP	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited
Restaruant	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP	Permitted	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP
Retail > 20,000 gross sf	Administrative or SUP	Permitted	Permitted	Permitted	Permitted	Permitted	Permitted	Permitted	Permitted	Permitted	Permitted	Administrative or SUP
Stone crushing operation	Administrative or SUP	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited
Valet parking	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP	Administrative or SUP
Vehicle towing/ impound lot	Administrative or SUP	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited
Waste to energy plant	Administrative or SUP	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited
Any other use	Administrative or SUP	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited

Permitted Use

Administrative or SUP

Prohibited

L SUP (Limited)

* Allowed in industrial or flex space center

TABLE 3: MAJOR LAND OWNERS OF INDUSTRIAL PROPERTIES

Industrial Sub-Area	Property Owner	Number of Parcels	Total Land (sf)	Current Land Value	Current Building Value	Total Value	Previous YR Land Value	Previous YR Building Value	Previous YR Total Value
2 & 3	CITY OF ALEXANDRIA	12	**969,250**	$ 26,408,456	$ 95,872,667	**$ 122,281,123**	*$ 26,080,589*	*$ 79,186,063*	***$ 105,121,804***
2	DUKE SHIRLEY LLC	8	**890,069**	$ 28,273,536	$ 9,436,464	**$ 37,710,000**	*$ 28,273,536*	*$ 8,502,703*	***$ 36,776,239***
3	VULCAN LANDS INC	2	**770,716**	$ 14,429,676	$ -	**$ 14,429,676**	*$ 14,429,676*	*$ -*	***$ 14,429,676***
1	BRE/DP ALEXANDRIA LLC	10	**560,256**	$ 27,265,816	$ 22,813,334	**$ 50,079,150**	*$ 27,265,816*	*$ 21,984,234*	***$ 47,331,100***
3	LANE CONSTRUCTION CORPORATION	5	**491,315**	$ 11,062,850	$ 197,100	**$ 11,259,950**	*$ 11,062,850*	*$ 197,100*	***$ 4,302,600***
3	AP ADLER PICKETT LLC	1	**472,173**	$ 16,150,000	$ 10,744,000	**$ 26,894,000**	*$ 16,150,000*	*$ 6,850,000*	***$ 23,000,000***
4	WASHINGTON COCA COLA BOTTLING CO	2	**383,027**	$ 12,356,343	$ 3,029,657	**$ 15,386,000**	*$ 12,356,343*	*$ 2,498,657*	***$ 14,855,000***
3	5903 FARRINGTON AVENUE LLC	3	**372,071**	$ 7,839,092	$ 129,288	**$ 7,968,380**	*$ 7,839,092*	*$ 129,288*	***$ 3,900,000***
3	INDIAN CREEK COMPANY LP	3	**317,938**	$ 6,123,000	$ 5,577,000	**$ 11,700,000**	*$ 6,123,000*	*$ 4,932,000*	***$ 8,917,000***
3	BDC FARRINGTON LLC	2	**310,496**	$ 9,366,218	$ 981,936	**$ 10,348,154**	*$ 9,366,218*	*$ 689,936*	***$ 9,500,000***
3	LRW LLC - 600 S PICKETT ST ATTN GREENHILL CAPITAL CORP	1	**270,176**	$ 7,700,000	$ 8,008,500	**$ 15,708,500**	*$ 8,727,000*	*$ 6,283,000*	***$ 15,010,000***
3	VIRGINIA ROOFING CORP	2	**219,612**	$ 4,757,000	$ 1,367,800	**$ 6,124,800**	*$ 4,757,000*	*$ 1,065,000*	***$ 5,822,000***
3	GREENHILLS MAYFLOWER LLC	1	**216,465**	$ 7,838,000	$ 100,000	**$ 7,938,000**	*$ 7,838,000*	*$ 100,000*	***$ 7,938,000***
2	AMT LLC	1	**212,969**	$ 651,360	$ -	**$ 651,360**	*$ 651,360*	*$ -*	***$ 651,360***

	Percent of Industrial L	sf (I-zoned land)	sf Parcels
CITY OF ALEXANDRIA	0.087	8.7	10.7
DUKE SHIRLEY LLC	0.080	8.0	9.8
VULCAN LANDS INC	0.069	6.9	8.5
BRE/DP ALEXANDRIA LLC	0.050	5.0	6.2
LANE CONSTRUCTION CORPORATION	0.044	4.4	5.4
AP ADLER PICKETT LLC	0.042	4.2	5.2
WASHINGTON COCA COLA BOTTLING CO	0.034	3.4	4.2
5903 FARRINGTON AVENUE LLC	0.033	3.3	4.1
INDIAN CREEK COMPANY LP	0.029	2.9	3.5
BDC FARRINGTON LLC	0.028	2.8	3.4
LRW LLC - 600 S PICKETT ST ATTN GREENHILL CAPITAL CORP	0.024	2.4	3.0
VIRGINIA ROOFING CORP	0.020	2.0	2.4
GREENHILLS MAYFLOWER LLC	0.019	1.9	2.4
AMT LLC	0.019	1.9	2.3

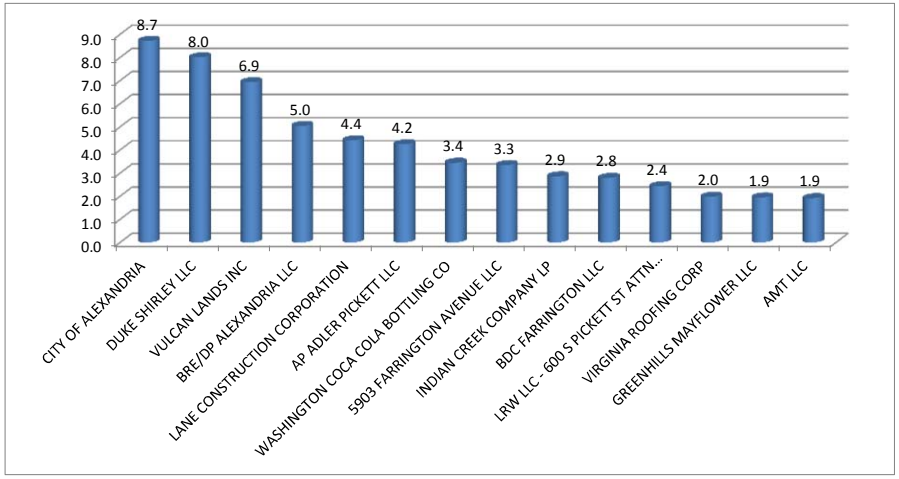


TABLE 4: USES ALLOWED ONLY IN THE I/INDUSTRIAL ZONE

Permitted Use	Special Use
Ambulance service	Asphalt plant
Animal Shelter	Concrete mixing or batching plant
Bottling Plant	Freight distribution center
Buidling materials storage or sales	Feul yard
Glass shop	General automobile repair
Laundry, dry cleaning operation	Helistop
Machine shop	Junkyard
Manufacturing	Motor vehicle storage yard
Parcel delivery	Recycling/recovery facility
Printing and publishing	Stone crushing operation
Sheet metal shop	Vehicle impound lot
Stone monument works	Waste to energy plant
Storage building/warehouse	Any other use
Public recycling center	

TABLE 5: BUSINESS USES IN TARGET AREAS

Category	CC	CDX	CG	CL	CSL	NR	OCM(50)	OCM(100)	OCH	I	Businesses in Target Areas
Office	3	1	28	88	20	3	5	35	5	35	**223**
Contractor/Construction	1	0	2	2	8	0	1	16	2	22	**54**
Retail	0	1	32	3	7	11	5	10	5	5	**79**
Wholesale	0	0	3	1	4	0	2	9	3	18	**40**
Fitness	1	0	10	0	0	1	2	1	9	3	**27**
Ship/Storage/Haul/Moving	0	0	3	0	1	0	3	5	2	9	**23**
Auto	3	0	32	1	20	4	4	16	5	33	**118**
Miscellaneous	1	1	6	3	0	1	2	5	1	2	**22**
Catering/Food Related	2	0	11	0	1	0	0	8	0	16	**38**
Restaurant	1	1	59	2	5	10	2	3	0	6	**89**
Pet	0	0	4	0	2	0	1	2	0	6	**15**
Neigborhood Personal Services	3	0	44	12	13	18	0	3	0	12	**105**
Industrial	0	0	0	0	0	0	0	1	0	11	**12**
Residential	0	0	0	0	0	0	0	1	0	0	**1**
Total Business	**15**	**4**	**234**	**112**	**81**	**48**	**27**	**115**	**32**	**178**	**846**