

IV. DEVELOPMENT ALLOCATIONS

The projected levels of development described in Section III, will occur throughout South Kitsap County based on development capacity, locational preferences and public policy. Draft development allocations are presented in this report as an input to the policy making required under the Growth Management Act and the Subarea Plan. The allocations are presented in this section in terms of:

Capacity Estimates

Locational Preferences and Opportunities

Development Allocations

CAPACITY ESTIMATES

The County prepared estimates of development capacity within urban growth areas and rural areas as part of a Buildable Lands Analysis, documented in the Building Lands Analysis report in 2002. The analysis identified the amount and type of development occurring between 1995 and 1999, and the land capacity at the end of the period, and considered the projected demand for residential and employment-based development. The conclusion of the report was that the County as a whole had adequate land available at that time to accommodate projected commercial and industrial growth and population projections. However, the analysis did not examine employment land needs for individual cities and UGAs. Further, the county-wide conclusions for residential land needs did not apply at the local level, as a surplus of land was indicated for Bainbridge Island and Port Orchard and a deficit was indicated for Bremerton and Poulsbo.

The County is currently updating its estimate of development capacity, both to identify the effects of recent development, and also to review and refine the criteria for designating net developable lands. The 2005 Updated Land Capacity Analysis (ULCA) for UGAs in South Kitsap County were finalized in August 2005. The results of this analysis and the current projections for population and employment-based development are compared below.

POPULATION PROJECTIONS AND CAPACITIES

The Kitsap Regional Coordinating Council (KRCC) develops County Wide Planning Policies for adoption by the County Commission, in accordance with the State Growth Management Act (GMA). KRCC develops population distributions for subareas of the County in collaboration with cities. KRCC prepared new designations in December 2004 as summarized in Table IV-1. The estimate of 76 percent of population growth to occur in UGAs is an adopted target. The target will be evaluated in five years. As shown in the

table, the population distributed to urban growth areas is 75,697. Applying the 76 percent UGA target, the amount of population growth to be accommodated in the non-UGAs would be 23,905. The estimated total population would thus be 331,571, equal to the OFM Intermediate population estimate.

Table IV-1

KRCC Population Distribution 2000 – 2025

Population Distribution 2005 – 2025	2000 Population	Through 2025	
		+ New Population	= Total in 2025
Bremerton City ²	37,259	14,759	52,017
Bremerton East UGA ¹	5,412	2,210	7,622
Bremerton West UGA ¹	3,229	2,017	5,246
Bremerton Port UGA ²	68	-68	0
Central Kitsap UGA ¹	21,743	8,733	30,476
Gorst UGA ¹	154	73	227
Silverdale UGA ¹	15,276	8,054	23,335
Bainbridge Island City ²	20,308	8,352	28,660
Kingston UGA ³	1,871	3,135	5,006
Poulsbo City ²	6,813	3,739	10,552
Poulsbo UGA ²	901	3,355	4,256
Port Orchard City ²	7,693	3,600	11,293
Port Orchard UGA ²	11,570	3,375	14,945
Port Orchard UGA Expansion Study Area ³	0	6,334	6,334
South Kitsap UGA (McCormick Woods/ULID #6) ²	1,241	8,024	9,265
UGA Population	133,537 (58%)	75,697 (76%)	209,234 (63%)
Non-UGA Population	98,432 (42%)	23,905 (24%)	122,337 (37%)
Total County Population	231,969	99,602	331,571
OFM Projection through 2025	Low		268,573
	Intermediate		331,571
	High		412,391

1 Based on PSRC Model

2 Based on City and/or County Comprehensive or Sub-Area planning

3 Target to be substantiated by further analysis and/or Sub-area planning

4 Office of Financial Management official estimate

Source: Kitsap Regional Coordinating Council, Adopted December 7, 2004

Focusing on the South Kitsap areas, the growth distributions are identified as:

	New Population 2000 – 2025
Port Orchard	
City	3,600
UGA	3,375
South Kitsap UGA (McCormick Woods and ULID 6)	8,025
Port Orchard UGA Expansion Study Area	6,334
	21,334

This population represents 28 percent of the population distribution to UGAs within the County, a slightly higher percentage than South Kitsap’s historical share of population, 26% in 2000.

Considering the census tracts corresponding to these UGAs, 921, 922, 923 and 924, the estimated population increase from 2000 to 2003 was only 33. If these estimates are true, the target population for the 20-year period 2005 to 2025 is only slightly less than the 25 year period 2000 to 2025.

The current capacity estimates for the South Kitsap UGAs are summarized in Table IV-2. The dwelling unit figures include units of all types (single family, multi-family, and mobile homes.)

**Table IV-2
Updated Land Capacity Analysis
South Kitsap UGAs**

	Dwelling Units	Population
Port Orchard		
City	1,417	3,271
UGA	844	2,089
South Kitsap UGA 1) (McCormick Woods/ULID #6)	3,210	8,024
Port Orchard UGA Expansion Area	To be determined	

¹ Based on 2003 Sub-Area Plan Approval

Source: 2005 Updated Land Capacity Analysis, August 11, 2005

The updated population capacity can be compared to the KRCC allocations for these UGAs.

**Table IV-3
Comparison of Updated Capacity
Analysis and Population Allocation**

	Capacity	Allocation	(Defecit)
Population			
Port Orchard			
City	3,271	3,600	-329
UGA	2,089	3,375	-1,286
South Kitsap UGA 1) (McCormick Woods/ULID #6)	8,024	8,024	0
Port Orchard UGA Expansion Area	To be Determined	6,334	-6,334
Dwelling Units			
Port Orchard			
City	1,417	1,558 (2)	-141
UGA	844	1,361 (2)	-517
South Kitsap UGA 1) (McCormick Woods/ULID #6)	3,210	3,210 (3)	0
Port Orchard UGA Expansion Area	To be Determined	2,534 (3)	-2,534

1 Allocated population assumed equal to capacity based on 2003 Sub-Area Plan Approval

2 Estimated using population per household factor in ULCA of 2.31 for City,
2.48 for UGA

3 Estimated using 2.5 population per household

Source: Property Counselors

The population allocations to both the City of Port Orchard and the Port Orchard UGA exceed the updated capacity estimates. Further, the population allocated to the South Kitsap UGA is assumed to equal the approved capacity per the adopted Sub-Area Plan, with no market factor to provide flexibility and efficiency in markets.

The Port Orchard UGA will be further analyzed through the Sub-Area Plan and Environmental Impact Statement to provide solutions to accommodating the allocated population and providing a market factor. A market factor acknowledges that more land needs to be available for development than the anticipated demand because some properties will not be available and others may not match the specified requirements. (See Appendix B for further discussion of market factors.)

COMMERCIAL INDUSTRIAL PROJECTIONS AND CAPACITIES

Kitsap County prepared a commercial industrial land supply demand analysis as part of the 1998 Comprehensive Plan. The County prepared an updated analysis in September 2004. The methods and conclusions of these analyses are discussed below.

The 1998 analysis was based on a comparison of land needs derived from employment projections. State projections for job growth were adjusted to reflect an increase in manufacturing jobs as a share of all non-agricultural jobs from 2.9 percent to 9 percent over 20 years. This adjustment reflects an economic development objective originally discussed at an Economic Development Summit in 1993, and later adopted as a policy in the 1998 update of the Comprehensive Plan.

The employment projections used are compared to the most recent employment projections from the State Department of Employment Security.

Table IV-4

Comparison of Employment Projections In 1998 Analysis and Current Projection

	Year 2012	
	1998 Analysis	Current DES
Construction/NatRes/Mining	4,628	5,200
Manufacturing	8,028	2,100
Transportation and Utilities	2,322	1,100
Retail and Wholesale Trade	21,539	13,000
Finance Insurance Real Estate	3,248	6,100
Services	28,008	31,400
Government	27,630	30,700
Total Covered Employment	95,403	89,600

Source: 1998 Kitsap County Comprehensive Plan, Economic Development Appendix,
Washington State Department of Employment Security

The numbers in certain sectors are difficult to compare because of the change in classification from the Standard Industrial Classification (SIC) to North American Industrial Classification System (NAICS). However, the current DES projections and recent employment trends do not yet reflect the higher manufacturing levels targeted in the previous plan. Such a target remains an economic development objective and Comprehensive Plan policy.

The previous employment projections were broken down into industrial and commercial sectors, and a space factor was applied to each.

	Factors		Employment Growth		Space Demand (Thousand SF)		Net Acres	
	Sq.Ft./ Emp	Lot Coverage	1997 – 2012	2013 – 2017	1997 – 2012	2013 – 2017	1997 – 2012	2013 – 2017
Industrial	969	0.38	9,397	2,601	9,106	2,520	550	152
Commercial	500	0.32	13,701	5,331	6,851	2,665	491	191

Further adjusting the net acres for the percentage of land that is developable, (36 percent of gross acres) using market factors of 50% for industrial and 25% for commercial (to reflect the need for designated land to exceed expected demand given that some properties will not be available and that some properties won't meet specific requirements of individual users as described in Appendix B), and considering that 89 percent of industrial land need and 55 percent of commercial land need will be in the County, the resultant need was estimated as:

1997 – 2012	Gross Land Need Uninc. County
Industrial	2,040 Acres
Commercial	938 Acres
2013 – 2017	Gross Land Need Uninc. County
Industrial	563 Acres
Commercial	299 Acres
Total 1997 – 2017	Gross Land Need Uninc. County
Industrial	2,603 Acres
Commercial	1,237 Acres
Avg Annual	Gross Land Need Uninc. County
Industrial	130 Acres
Commercial	62 Acres

The 1998 Comprehensive Plan identified the capacity for development as:

Industrial or Business Park Land	876 acres
Commercial Land	567 acres

The County responded to the projected demand by designating additional industrial lands between 1998 and 2003 including:

Port Blakely	293
Site Specific Changes 2002	-12
Poulsbo UGA	17
Site Specific 2003	-4
ULID #6 (2003)	70
SKIA (2003)	1,253
Total Additions	1,617

With these additions, the projected demand still exceeded supply by 110 acres.

Similarly, the County designated additional commercial lands between 1998 and 2003.

Site Specific 2002	60
Manchester Subarea	-7
Site Specific 2003	12
Kingston UGA 2003	-29
Total Additions	36

With these additions the projected demand still exceeded supply by 700 acres. The County adopted site specific Comprehensive Plan amendments in 2004 that reduced the industrial shortfall by 27.5 acres and the commercial shortfall by 42.6 acres.

With the updated Land Capacity Analysis estimates of net acreage for individual UGAs in South Kitsap, and the demand projections for South Kitsap presented in Section III, it is possible to refine this analysis.

LOCATIONAL PREFERENCES AND OPPORTUNITIES

The traditional location factors for individual uses can be compared to the characteristics of the South Kitsap area and the study area to determine what market based opportunities are available to meet future demand.

RESIDENTIAL

Preferred locations for residential development are those that have the features that residents desire, and which can be delivered at affordable prices. The factors can be summarized as follows:

Resident Preferences

Proximity to Jobs
Accessibility to Regional Transportation
Proximity to Commercial Services
Proximity to Recreational Resources
Quality of Schools, and Other Institutions
Availability of Views And Amenities

Cost Factors

Availability of Utilities
Relatively Flat Sites
Relatively Few Critical Areas
Availability for Development

The opportunities for residential development can be rated as high, medium, and low within each of the census tracts in South Kitsap County. The ratings are relative to the resident preference criteria. The cost criteria are site specific and will be considered as in the alternatives analysis portion of this study.

Tract 921 Gorst/Glenwood

High:

McCormick Woods

This area is an attractive established residential development with good connections to the regional transportation network and high amenity value. While there are limited commercial services in the immediate area, there are areas designated for further development.

Medium:

Anderson Hill/Berry Lake

Harper Road

Glenwood

Sidney/Sedgewick (west of Highway 16 and north of Sedgewick Road).

These areas are currently not developed for residential at urban densities but they are located between such areas, and they are accessible to the regional transportation network and employment opportunities, and provide attractive settings for development. The Sidney/Sedgewick area is particularly suitable for higher density multifamily development in proximity to commercial development

Tract 922 Port Orchard

High:

City of Port Orchard

The City is well located with respect to employment opportunities and the regional transportation network. There are a variety of commercial services available throughout the City, as well as recreational amenities and waterfront access.

Medium:

SR 16/Sedgewick Road (east of Highway 16 and north of Sedgewick Road)

This area is suitable for multifamily residential development in proximity to commercial development.

Tract 923 East Port Orchard

High:

Ramsey Road/Blueberry

This area is suitable for multifamily and mixed use development in proximity to new commercial development. The balance of the tract is suitable for infill development.

Tract 924 East of Jackson

High:

Salmonberry Road

This area has good connections to the regional transportation network, and existing commercial services.

Tract 925 Retsil

High:

Sinclair Height

This area is adjacent to the City of Port Orchard and offers proximity to the water and view opportunity.

Tract 926 Manchester

This area is outside the boundaries of this study area.

Tract 927 Southworth

This area is outside the boundaries of this study area.

Tract 928.01 Bethel

Medium

Strawberry Hills

This area is at the edge of existing urbanized area but does enjoy good access to the major regional transportation routes.

Bethel Road South at Sedgewick

This area is suitable for multifamily residential in proximity to commercial development.

Tract 928.02 South of Mullinex

This area is outside the boundaries of this study area.

Tract 929.01 South of Flora

This area is outside the boundaries of this study area.

Tract 929.02 Burley

This area is outside the boundaries of this study area.

COMMERCIAL DEVELOPMENT

Commercial development includes retail, office and lodging. Preferred sites for commercial development are those that provide convenient services to the trade area population. The factors can be summarized as follows:

Convenient access and visibility from regional and local transportation network.

Proximity to population base and spending potential.

Proximity to other commercial services.

The opportunities for commercial development can be rated as high, medium and low. In many cases, these areas are already in the process of annexing and being zoned commercial. Existing commercial lands that are vacant or underutilized will not be rated as high as other areas, if the latter have better access and proximity to population or other commercial concentrations.

Tract 921 Gorst/Glenwood

High:

Sidney/Sedgewick Road

This area has excellent access and visibility from one of the major interchanges on one of the busiest highways in the area. The site is suitable for regional scale retail. Sites in this area are under consideration for rezoning.

Medium:

Anderson Hill/Berry Lake
McCormick Woods
Glenwood Road

These areas offer proximity to population concentrations, but have frontage on major arterials rather than the highway. These areas are more suitable for neighborhood scale development.

Tract 922 Port Orchard

High:

SR 16/Sedgewick Road (east of SR 16)

This area has excellent access and visibility from one of the major arterials on the busiest highway in South Kitsap.

Medium:

Elsewhere in Port Orchard

Areas elsewhere on arterials in Port Orchard are suitable for neighborhood scale retail development.

Tract 923 East Port Orchard

High:

Ramsey Road/Blueberry

This area enjoys good highway access, and is planned for large scale retail development.

Tract 924 East of Jackson

Medium

Salmonberry Road

This area offers good arterial access and proximity to existing commercial and residential development.

Mile Hill Road

This area is an established arterial for neighborhood commercial development.

Tract 925 Retsil

Medium

Mile Hill Road

This area is an established arterial for neighborhood commercial development.

Tract 926 Manchester

This area is outside the boundaries of this study area.

Tract 927 Southworth

This area is outside the boundaries of this study area.

Tract 928.01 Bethel

High

SR 16/Sedgewick Road southeast quadrant.

Fred Meyer area.

These areas offer excellent highway access, as well as proximity to existing major commercial development.

Tract 928.02 South of Mullinex

This area is outside the boundaries of this study area.

Tract 928.03 Olalla

This area is outside the boundaries of this study area.

Tract 929.01 South of Flora

This area is outside the boundaries of this study area.

Tract 929.02 Burley

This area is outside the boundaries of this study area.

INDUSTRIAL DEVELOPMENT

Preferred sites for industrial development are those that provide convenient access for delivery of materials and shipment of goods, and proximity to suppliers and customers. Specific factors can be summarized as follows:

Convenient Highway, Rail and Air Access.
Proximity to Suppliers And Customers
Proximity to Labor Force
Availability of Large Sites
Buffers from Residential Uses

The opportunities for industrial development can be rated as high medium and low. Existing industrial lands that are vacant or underutilized will not be rated as high as other areas, if the latter have better access, proximity, and site features.

Tract 921 Gorst/Glenwood

High:

South Kitsap Industrial Area
Port Orchard Industrial Park and Adjacent Lands

These areas enjoy access to State Highways 3 and 16. SKIA is adjacent to the Bremerton National Airport. Portions of SKIA are served by rail. There are large parcels available in SKIA.

Medium:

McCormick Woods
Northwest Corporate Center
Sidney/Sedgewick Road (west of SR 16)

These areas are desirable for business park development, but not as much so for manufacturing and warehouse use because of the proximity to residential areas. The Sidney/Sedgewick area would be suitable for industrial development but would be more valuable for commercial use.

Tract 922 Port Orchard

Medium

SR 16/Sedgewick Road (Northeast Quadrant)
This area would be suitable for industrial use, although it could be more valuable for commercial use.

Tract 923 East Port Orchard

There are no obvious opportunities for industrial development in this area.

Tract 924 East of Jackson

There are no obvious opportunities for industrial development in this area.

Tract 925 Retsil

There are no obvious opportunities for industrial development in this area.

Tract 926 Manchester

This area is outside the boundaries of this study area.

Tract 927 Southworth

This area is outside the boundaries of this study area.

Tract 928.01 Bethel

Medium

This area would be suitable for industrial development although it would be more valuable for commercial use.

Tract 928.02 South of Mullinex

This area is outside the boundaries of this study area.

Tract 928.03 Olalla

This area is outside the boundaries of this study area.

Tract 929.01 South of Flora

This area is outside the boundaries of this study area.

Tract 929.02 Burley

This area is outside the boundaries of this study area.

DEVELOPMENT ALLOCATIONS

The purpose of the development allocations task is to determine whether additional land is required outside the existing UGA to accommodate projected growth. Further, based on locational requirements of individual uses, what general areas outside the existing

UGA are most suitable for development. These results will provide one basis for allocating development under a set of alternatives for the plan. Given those alternatives, an update of the land capacity analysis can determine whether the alternatives are adequate to meet the projected demand.

RESIDENTIAL

The KRCC population allocations presented at the beginning of this section can be characterized as follows:

- The distribution/allocations account for a County population of 331,571, equal to the OFM intermediate projections, by 2025.
- The population allocated to South Kitsap UGAs is approximately 28 percent of County population allocations within UGAs, slightly higher than the historic fraction of 26 percent.

The total population projection for South Kitsap County is reasonable in comparison to OFM projections and historical growth patterns. However, the comparison of housing needs to development capacity should include a market factor of 25 percent to reflect the fact that designated lands should exceed anticipated demand since some properties will not be available and some properties won't meet specific needs of individual users. The rationale for this factor is discussed in Appendix B. The comparison of UGA capacity and need can be revised as shown in the following table:

**Table IV-5
UGA Expansion Area Growth Requirements**

	Dwelling Unit Allocation	Dwelling Unit Capacity	Additional Capacity Required
Basic Allocation	2,534	To be determined	2,534
Basic Allocation w/ Market Factor 25%	3,168	To be determined	3,168
Plus Port Orchard City and UGA	5,453	2,261	3,192
Plus Port Orchard City and UGA w/ Market Factor 25%	6,829	2,261	4,568
Plus South Kitsap UGA (McCormick Woods/ULID #6)	8,663	5,471	3,192
Plus South Kitsap UGA w/ Market Factor	10,829	5,471	5,357

Source: Property Counselors

The successively higher numbers can be interpreted as follows:

An expansion area with the capacity for 2,534 units is necessary to meet the basic population allocation from KRCC.

An expansion area with the capacity for 3,168 units is necessary to meet the allocation and provide a 25% market factor.

An expansion area with the capacity for 3,192 units would be necessary to meet the basic allocation and make up the deficit for the Port Orchard City and UGA.

An expansion area with the capacity for 4,568 units would be necessary to meet the basic allocation, the Port Orchard City and UGA deficits, and provide a 25% market factor for all areas including South Kitsap UGA (McCormick Woods/ULID #6)

These numbers would be reduced by the number of new units that have been built in these areas between 2000 and 2005. This number is approximately 5% of the 2000 dwelling unit count or approximately 9% of the projected growth figures.

The following areas outside the existing UGA all received medium ratings for resident location preferences.

Tract 921 including Anderson Hill/Berry Lake, Glenwood Road, and Harper Road.

Tract 923 including Ramsey Road, Blueberry Road, and Bethel Road

Tract 925 east of Sinclair Heights

Tract 928.01 including Bethel Road, Phillips Road, and Strawberry Hill.

They are suitable locations for expansion of the UGA.

COMMERCIAL

The current County analysis was prepared in September 2004 on a County-wide basis for gross land needs. The comparison of supply and demand presented at the beginning of this section can be summarized as follows:

- The gross acreage requirements incorporate adjustments for critical areas and a market factor of 25 percent. The factors used, including the market factor are acceptable for such an analysis.
- The projected employment increases support an estimated 6,850,500 square feet of commercial development County-wide for 1997 – 2012, and 2,665,500 for 2013 – 2017.

- Accounting for critical areas, and applying a market factor of 25%, the estimated commercial land demand over the period 1997 to 2017 exceeds designated land by 700 acres.

With the Updated Land Capacity Analysis estimates of net acreage for individual UGAs, its possible to refine this analysis.

The forecasts in Section III for the 20 year period 2000 to 2020 at the County level were

Retail	5,891,000
Office	2,850,800
Total	8,731,000

The Section III and County analysis totals are comparable. The office portion in the previous analysis was probably overstated because the 500 square feet per employee used is appropriate for retail but high for office. The retail figure underestimates the demand as suggested by the historical absorption comparison. Overall, the projected needs analysis at the County level are still valid.

Focusing on South Kitsap County, the absorption projections presented in Section III are used as the basis for the allocations. For retail space, the annual absorption projection of 70,000 square feet for the period 2003 to 2020 is extrapolated to the period 2005 to 2025. Building area is translated into site area using a floor area rate of .25, a typical figure for single story retail developments. For office space, the annual absorption figure of 26,500 for the period 2000 to 2020 is extrapolated to the period 2005 to 2025. Building area is translated into site area using a floor area ratio of .32, reflecting a mix of single story and multistory buildings. For lodging, the projected demand for 200 rooms would require 6 net acres..

	Building Requirement 20 Years	Net Acres	Net Acres w/ Market Factor
Retail	1,400,000 SF	129	160.7
Office	530,000 SF	38	47.5
Lodging	200 Rooms	6	7.5

The net acreage requirement can be compared to the updated land capacity estimate.

Table IV-6 Updated Commercial Land Capacity

	Net Acres
City of Port Orchard	43.7
Port Orchard Urban Growth Area	112.0
Gorst	11.0
Total	166.7

Source: 2005 Updated Land Capacity Analysis, August 11, 2005

The twenty year growth projection of 215.7 net acres exceeds the capacity by 49 acres.

These conclusions reflect current usage patterns and historic comprehensive plan goals. If South Kitsap County were to pursue and capture regional scale retail development (similar to Kitsap Mall), the requirements would differ.

These net acreage requirements will be distributed among the existing UGAs and additional areas designated for commercial development. The areas that are preferred from a market perspective are:

SR 16 Interchanges

Major Arterials
Sedgewick Road
Bethel Road
Mile Hill Road

Other Arterials
Old Clifton
Lund
Ramsey Road

INDUSTRIAL

The current County analysis was prepared on a County-wide basis. The comparison of supply and demand presented at the beginning of this section can be summarized as follows:

- The gross acreage requirements incorporate adjustments for critical areas and a market factor of 50 percent. A higher market factor is appropriate in an emerging area where availability of sites will be an important part of marketing the area.

- The projected employment increases support an estimated 11,626,000 square feet of development County-wide between 1997 and 2017.
- Accounting for critical areas and applying a market factor of 50%, the estimated commercial land demand over the period 1997 to 2017 exceeds the estimated designated land capacity by 110 acres.

With the Updated Land Capacity Analysis estimates of net acreage for industrial UGAs, its possible to update this analysis.

The projections in Section III for the 20 year period 2000 to 2020 were only 3.3 million square feet. The difference is the adopted County policy of increasing the manufacturing sectors share of total employment from 2.9 percent to 9.0 percent. Such a policy will dictate a higher land need estimate than extrapolating of historic trends.

Manufacturing employment has not increased its share of total employment since 1998. So 20 year projections for 2005 through 2025 will not differ significantly from the 20 year projections from 1997 to 2017. The net acreage requirement for the 20-year period is estimated to be as follows:

	Net Acres	Net Acres with 50% Market Factor
1 st 10 Years	550	825
2 nd 10 Years	152	228
	702	1,053

South Kitsap County will capture a large share of future industrial development, because the South Kitsap Industrial Area (SKIA) is the largest area designated for industrial development in the County. SKIA and the other UGAs in South Kitsap County represent approximately 60% of the net industrial land capacity in the County.¹ Assuming that South Kitsap County captures a commensurate share of industrial development, it would require 631 net acres of industrial demand over the 20 year period.

¹ The total capacity for industrial development is derived from a combination of the 2005 Updated Land Capacity Analysis and data from city comprehensive plans. The estimates and their sources are summarized below.

	Source	Net Acres
City of Port Orchard	2005 ULCA	13.3
Port Orchard UGA	2005 ULCA	6.6
South Kitsap Industrial Area (SKIA)	2005 ULCA	917.1
Gorst	2005 ULCA	1.3
Subtotal South Kitsap		<u>938.3</u>
City of Bremerton	Comp Plan, Port Blakely	300.0
Bremerton East	2005 ULCA	0
Bremerton West	2005 ULCA	5.2
Central Kitsap	2005 ULCA	5.4
Silverdale	2005 ULCA	206.9
Poulsbo	Comp Plan, Light Industrial, and Business Park Zones	55.0
Bainbridge Island	Comp Plan, Light Industrial Zone	69.2
Kingston	2005 ULCA	<u>7.3</u>
Total		1,587.2
South Kitsap as % of Total		59.1%

The updated land capacity is compared to the 20 year demand in Table IV-7.

Table IV-7
Comparison of Industrial Land
Capacity and 20 Year Demand

	Land Capacity Net Acres	20 Year Demand Net Acres
City of Port Orchard	13.3	
Port Orchard Urban Growth Area	6.6	
South Kitsap Industrial Area	917.1	
Gorst	1.3	
Total	938.3	631

As shown, the land capacity exceeds the 20 year demand by approximately 300 acres. The areas currently designated for industrial use have adequate capacity to meet the demand.

These conclusions reflect current usage patterns and historic comprehensive plan goals. The analysis may be required to be reevaluated for any potential large site development project utilizing industrial sites with South Kitsap.

The areas in the City of Port Orchard and the Port Orchard Urban Growth Area, as well as the portions of SKIA such as the Port properties and designated areas of the McCormick Woods will likely be built-out during this period, with the remainder of the 20 year demand occurring elsewhere in SKIA.

The conclusions of this analysis differ somewhat from the County-wide analysis presented at the beginning of this section. That analysis was done at the County-wide level using gross industrial acreage. The current analysis relies on estimates of net industrial acreage and is based on specific consideration of development constraints.