

Policy Plan Amendment 2022-CW-2CP Industrial Land Use Trends

Board of Supervisors Land Use Policy Committee

March 11, 2025

PLANNING & DEVELOPMENT

Key Industrial Findings

Clarion identified the following related to **industrial trends.**

1. Demand and growth has been tied to the types of industrial uses
2. Limited supply and size of industrially zoned parcels

Trends in Industrial
NATIONALLY



Primary industries seeking industrial space in 2023:

- **Warehouse and Distribution**
  - –22% of the total demand
- **Auto Industry**
  - –156% increase in demand since 2021
- **Construction, Machinery and Materials**
  - –41% increase in demand
- **Reshoring**
  - –240 million SF increase in demand for ports in the Southeast

Trends in Industrial
LOCALLY

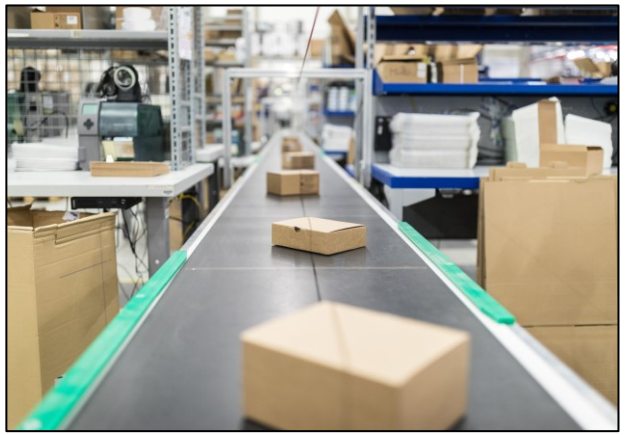
1. Industrial inventory of 38.9 million square feet (from EDA)

2. Current industrial vacancy rate is 4.9% - this is slightly up from last year (and the last few years), but it is still a very tight/over-heated market.

3. Average leasing rates steadily increasing. According to CoStar, from Q12019 to now there has been a 39% increase in the average leasing rate.

PLAN FORWARD

Warehousing & Distribution Space



Data Centers



Industrial

Planned and Zoned Industrial

Planned

3,712 Acres, 1.53% of County

- Beltway South
- I-95 Corridor
- Ravensworth
- Other areas (Dulles Suburban Center, Merrifield, Herndon/Reston Tysons)

Zoned

8,274 Acres, 3.44% of County

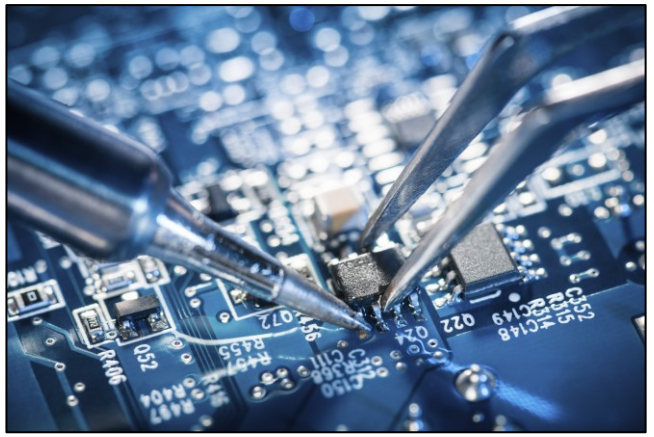
Table 2: Vacant Land Zoned for Industrial

Zoning	Number of Parcels	Approximate Acreage
I-I, Industrial Institutional	1	12.91
I-3, Light Intensity Industrial	4	20.2
I-4, Medium Intensity Industrial	9	42.07
I-5, General Industrial	40	121.57
I-6, Heavy Industrial	13	53.25
Totals	67	250

Source: Fairfax County Department of Management and Budget, January 2022

Evolving Needs for Industrial

- Manufacturing for Emerging Trends
  - Hi-tech manufacturing
  - Micro-industry or Maker Movement
- Heavy Industrial
- Industrial Parks
- Mix of Uses
- Industrial Demand vs. Housing Needs





Next Steps - Comprehensive Plan Amendments

1. Expand criteria for requests to replan industrial land for residential development.

2. Retain existing industrial land in designated industrial areas to the extent practicable.

3. Review and Consider Updates to Special Planning Areas



Industrial Land Use Trends Report

Questions and Discussion

Policy Plan Amendment
Contact Information

- To learn more about the project, visit our project webpage: Plan Amendment 2022-CW-2CP | Planning Development (fairfaxcounty.gov)
- To review the current Policy Plan, please visit: Policy Plan (encodeplus.com)
- To provide comments or potential policy considerations please contact: PlanForwardFFX@PublicInput.com