



# PRODUCTION, DISTRIBUTION, AND REPAIR IN SAN FRANCISCO



**SAN FRANCISCO  
PLANNING  
DEPARTMENT**



# WHAT IS PDR?



**Production**



**Distribution**



**Repair**





# CHARACTERISTICS OF PDR

A welder wearing a helmet and protective gear is working in a cluttered industrial space. Sparks are flying from the welding process. The background shows various tools, equipment, and a concrete wall. The scene is dimly lit, with a focused light source on the welder.

**Can't compete on rent**

**Can't afford to build new space**

**Low employment per square foot**

**May conflict with other uses (*noise, smell, etc.*)**

**Don't provide a daily convenience for residents**

**Can't be "off-shored"**



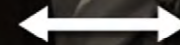
# ROLE OF PDR IN THE ECONOMY

Necessary to support  
our economic drivers  
(*tech and tourism*)

Necessary to support  
local population



**EXPORT**



**People Infrastructure**



**PDR**  
( **Physical Infrastructure** )



# ROLE OF PDR IN THE ECONOMY

Good pay relative to education

Provides job diversity

Median wage **PDR**  
**\$60,000**

Median wage **Retail**  
**\$30,000**

% of **Jobs** for people  
*without 4-year degrees*



PDR



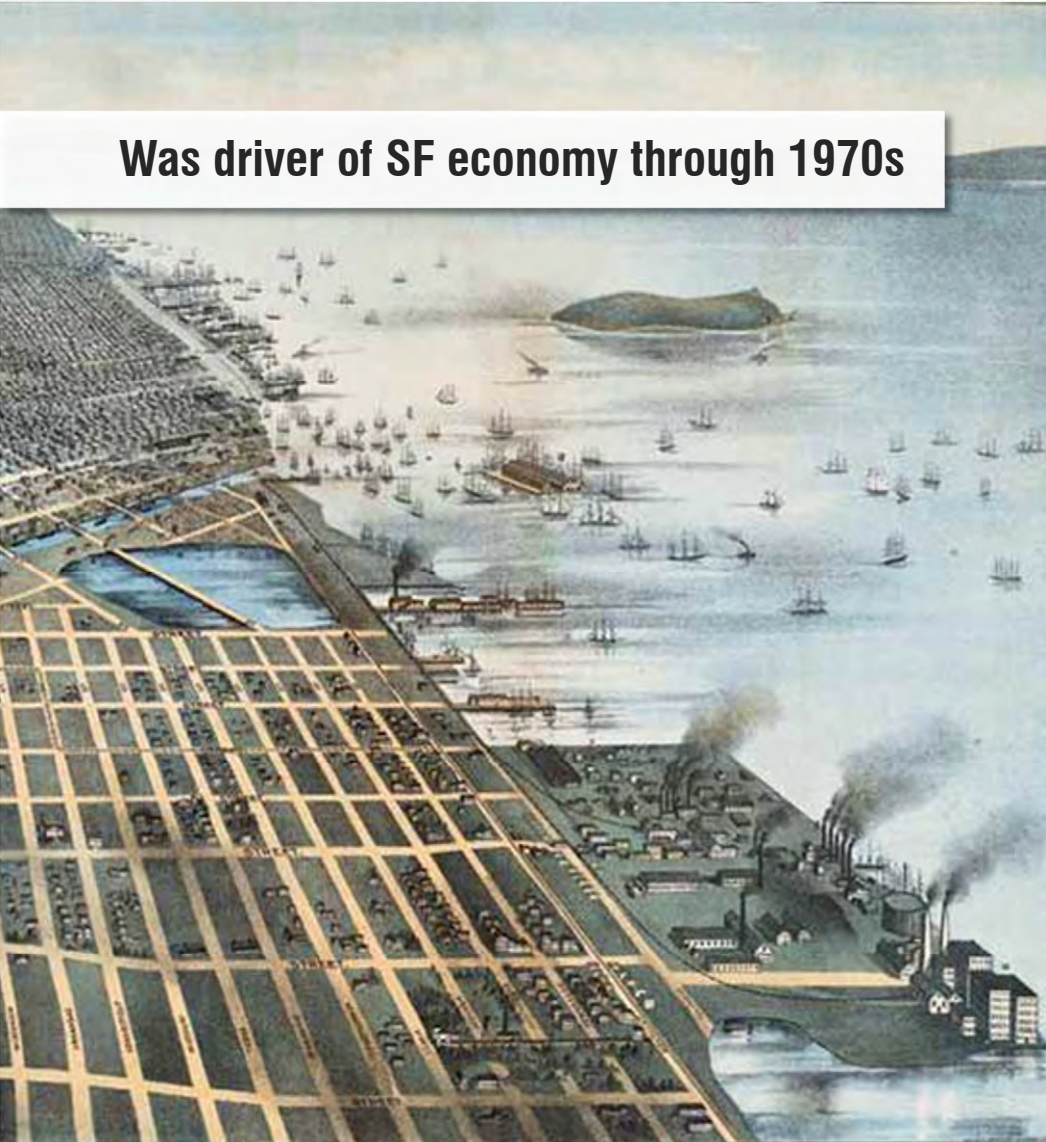
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Source: Census Bureau / Bureau of Labor Statistics



# HISTORY OF PDR IN SAN FRANCISCO

Was driver of SF economy through 1970s





# HISTORY OF PDR IN SAN FRANCISCO



*Peak PDR employment:*

**165,000** JOBS



*33% of city total*



# HISTORY OF PDR IN SAN FRANCISCO



*PDR employment today:*

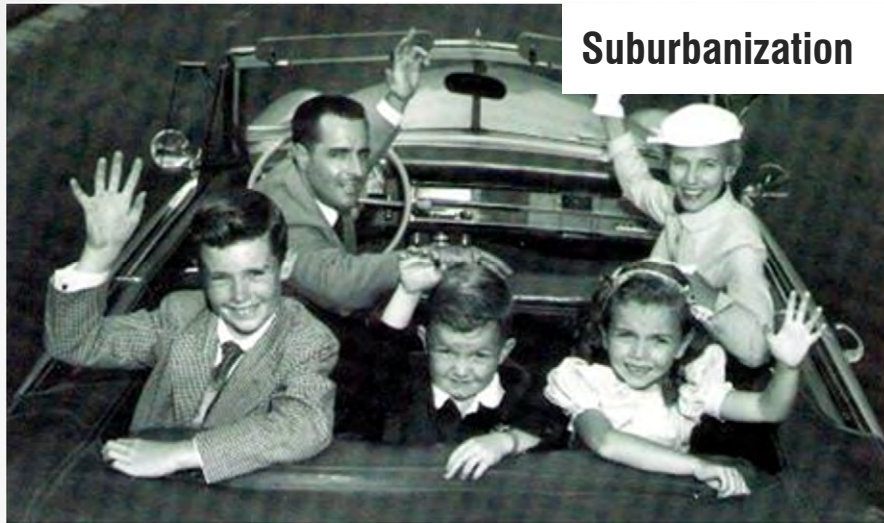
**63,000** JOBS



*10% of city total*



# REASONS FOR THE DECLINE OF PDR



**Suburbanization**



**Globalization**



**Containerization**



**Land Competition**



# STATE OF PDR TODAY



Source: Cassidy Turley 2014



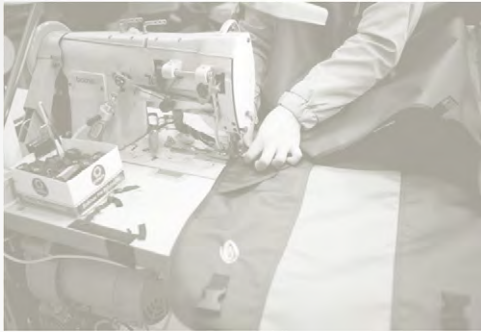
Source: SFMAde 2014



Source: Cassidy Turley 2014



# WHAT ARE THE PDR JOBS?



## PRODUCTION

Manufacturing	<b>8,500</b>
Construction	<b>6,500</b>
Printing & Publishing	<b>3,700</b>
Audio, Film, & Video	<b>2,400</b>
Media	<b>1,800</b>
Arts	<b>?</b>



## DISTRIBUTION

Wholesale	<b>11,500</b>
Transportation	<b>8,200</b>
Utilities	<b>3,500</b>
Distribution	<b>2,700</b>



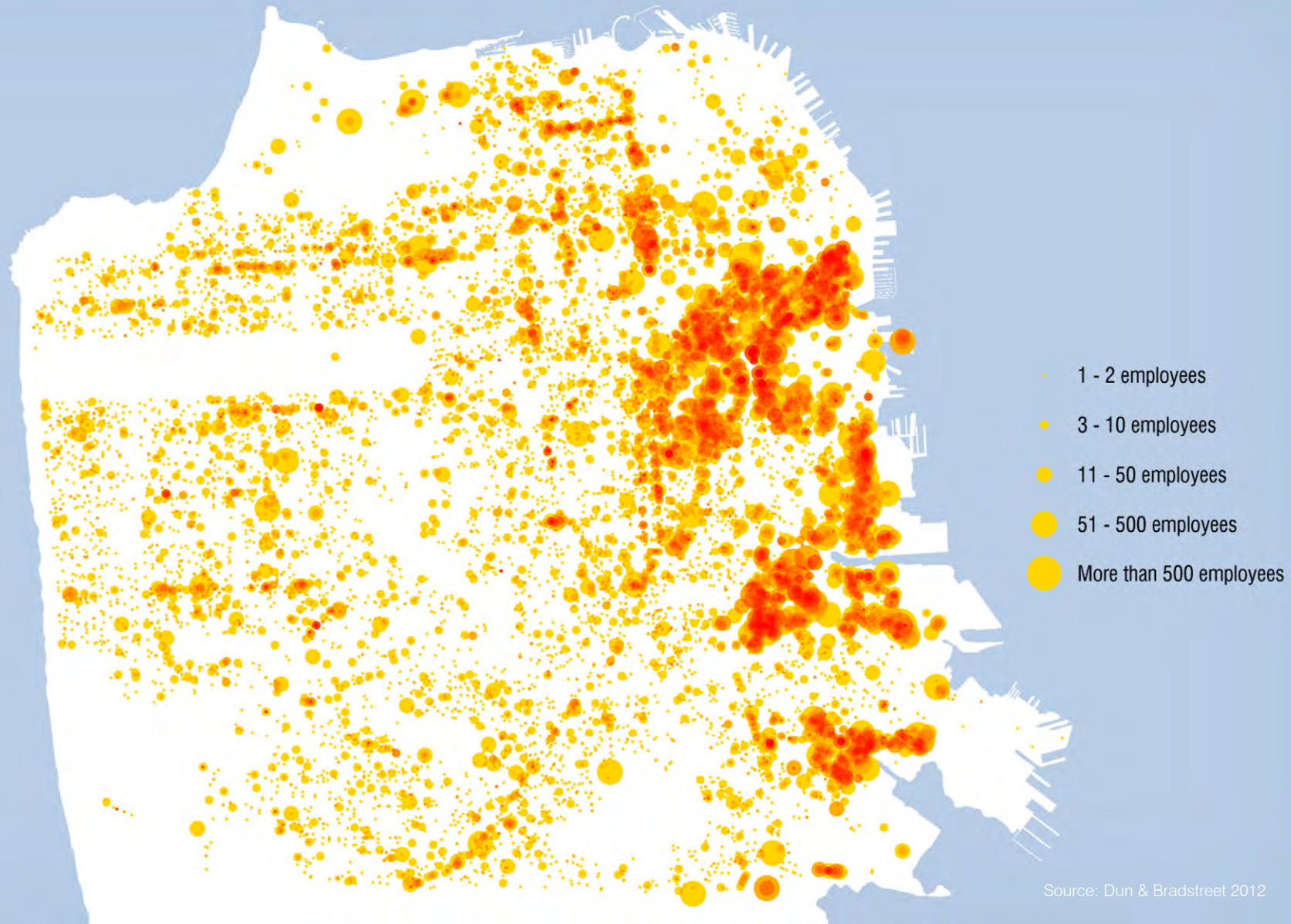
## REPAIR

Contractors	<b>8,400</b>
Auto	<b>2,600</b>
Repair	<b>1,100</b>

Source: Dun & Bradstreet 2012

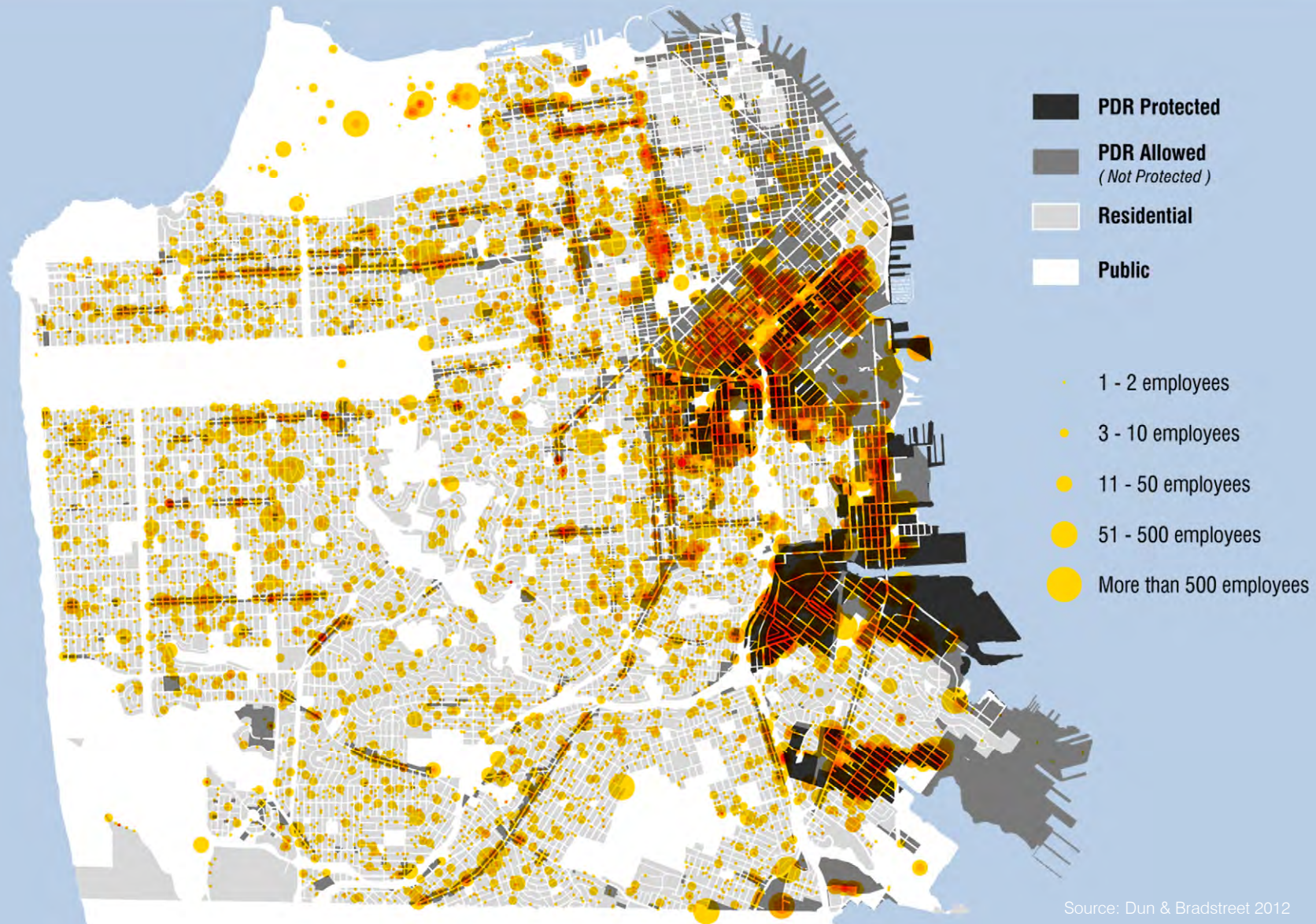


# LOCATION OF PDR JOBS





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# LOCATION OF PDR JOBS

**33%**

in Residential Districts

**33%**

in Unprotected Districts

**33%**

in “Protected Districts”

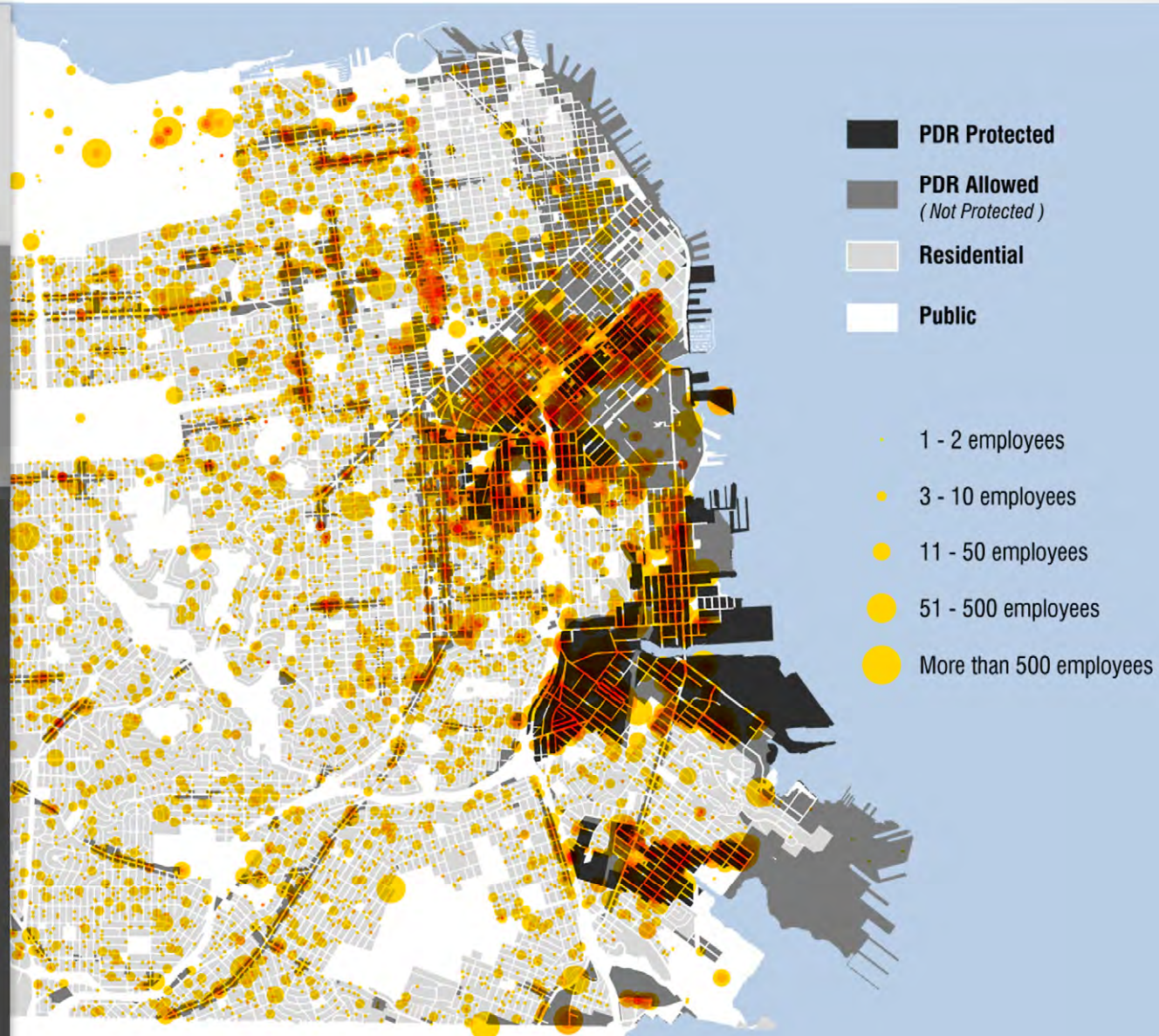
PDR-1 and PDR-2 (2008) **18,000**

SLI (1989) **1,400**

SALI (2013) **1,600**

M-2 on the Port **1,200**

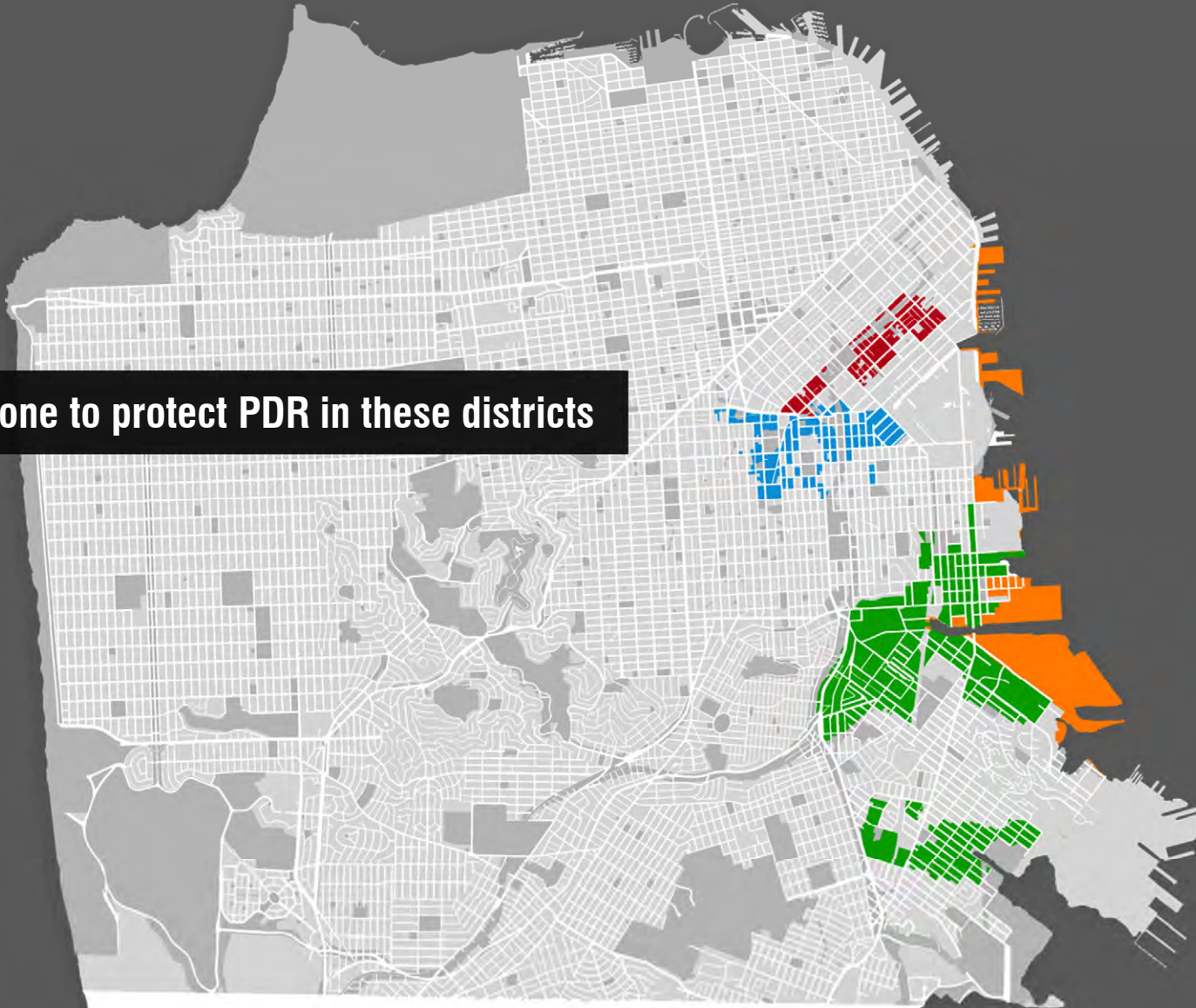
Source: Dun & Bradstreet 2012





# WHAT HAS PLANNING DONE TO SUPPORT PDR?

Zone to protect PDR in these districts





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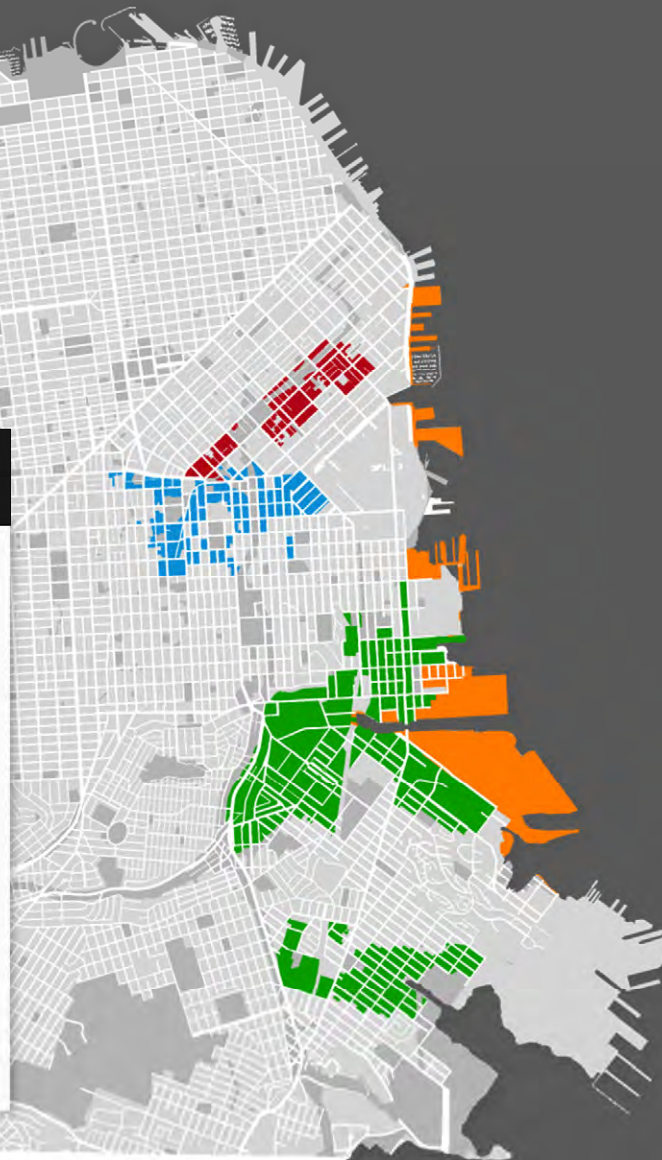
**1,274** *total acres* 5.6% of City Land

**SLI and SALI** 90

**PDR in Mission / Showplace** 140

**Industrial Port Land** 406

**PDR in Central Waterfront / Bayview** 638





# WHAT HAS PLANNING DONE TO SUPPORT PDR?



**Allow PDR as-of-right in mixed-use districts**

**Closed loopholes – *no live/work or business services***



# WHAT HAS PLANNING DONE TO SUPPORT PDR?



**Support new PDR businesses**

*Reduced process*

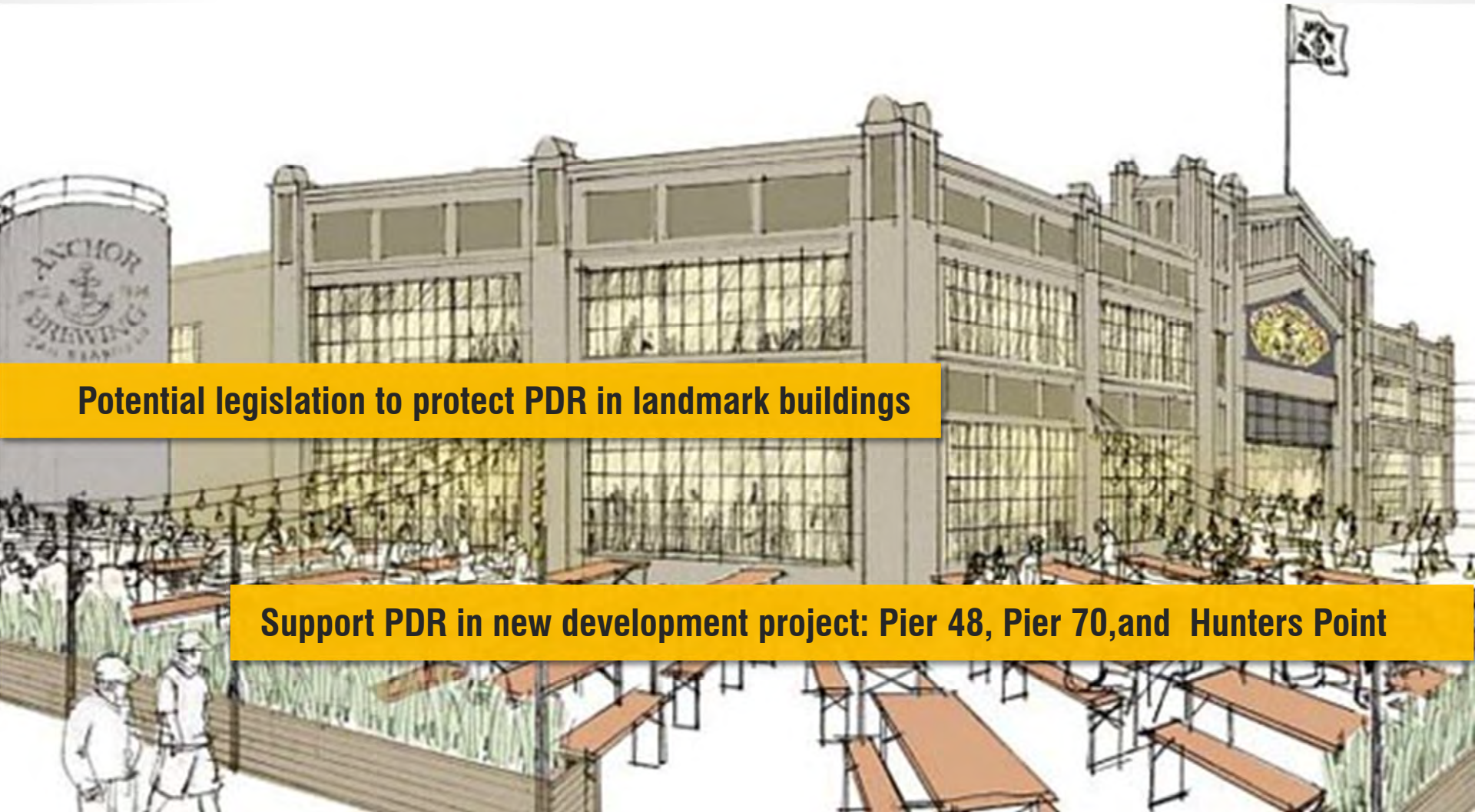
*Incentivize new construction*

*Reduced fees*

*Work closely with SFMade*



# WHAT ARE OUR NEXT STEPS?



**Potential legislation to protect PDR in landmark buildings**

**Support PDR in new development project: Pier 48, Pier 70, and Hunters Point**



# WHAT ARE OUR NEXT STEPS?



**Support PDR in Central SoMa**

**Potential legislation to protect PDR along 16th Street**



# WHAT ARE OUR NEXT STEPS?



**Explore proactive engagement and enforcement**

**Explore regional study of PDR**



***THANK YOU***

*[www.sfplanning.org](http://www.sfplanning.org)*



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**PLANNING DEPARTMENT**