WHAT IS PDR?

Production

Distribution

Repair
CHARACTERISTICS OF PDR

- 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

Tech

Tourism

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

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

Production, Distribution, and Repair in San Francisco
STATE OF PDR TODAY

Sector is strong due to economy

Urban manufacturing on the rise

Very low vacancy rate

# OF SFMADE COMPANIES

<table>
<thead>
<tr>
<th>Year</th>
<th>#</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>0</td>
</tr>
<tr>
<td>2011</td>
<td>250</td>
</tr>
<tr>
<td>2012</td>
<td>403</td>
</tr>
<tr>
<td>2013</td>
<td>512</td>
</tr>
<tr>
<td>Today</td>
<td>540</td>
</tr>
</tbody>
</table>

Rents 2-3 times that of rest of Bay Area

Source: SFMade 2014

Source: Cassidy Turley 2014

Source: Cassidy Turley 2014

Production, Distribution, and Repair in San Francisco
**WHAT ARE THE PDR JOBS?**

### PRODUCTION

<table>
<thead>
<tr>
<th>Category</th>
<th>Jobs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manufacturing</td>
<td>8,500</td>
</tr>
<tr>
<td>Construction</td>
<td>6,500</td>
</tr>
<tr>
<td>Printing &amp; Publishing</td>
<td>3,700</td>
</tr>
<tr>
<td>Audio, Film, &amp; Video</td>
<td>2,400</td>
</tr>
<tr>
<td>Media</td>
<td>1,800</td>
</tr>
<tr>
<td>Arts</td>
<td>1,800</td>
</tr>
</tbody>
</table>

### DISTRIBUTION

<table>
<thead>
<tr>
<th>Category</th>
<th>Jobs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wholesale</td>
<td>11,500</td>
</tr>
<tr>
<td>Transportation</td>
<td>8,200</td>
</tr>
<tr>
<td>Utilities</td>
<td>3,500</td>
</tr>
<tr>
<td>Distribution</td>
<td>2,700</td>
</tr>
</tbody>
</table>

### REPAIR

<table>
<thead>
<tr>
<th>Category</th>
<th>Jobs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contractors</td>
<td>8,400</td>
</tr>
<tr>
<td>Auto</td>
<td>2,600</td>
</tr>
<tr>
<td>Repair</td>
<td>1,100</td>
</tr>
</tbody>
</table>

Source: Dun & Bradstreet 2012
LOCATION OF PDR JOBS

Source: Dun & Bradstreet 2012
LOCATION OF PDR JOBS

Source: Dun & Bradstreet 2012
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
WHAT HAS PLANNING DONE TO SUPPORT PDR?

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
- Reduced fees
- Incentivize new construction
- 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