



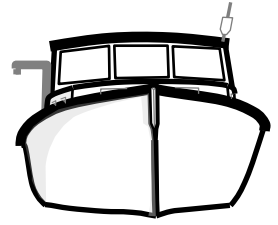
Waterfront Working Group

First Meeting Agenda

January 3, 2019

Room 24, City Hall

3:00 pm to 5:00 pm



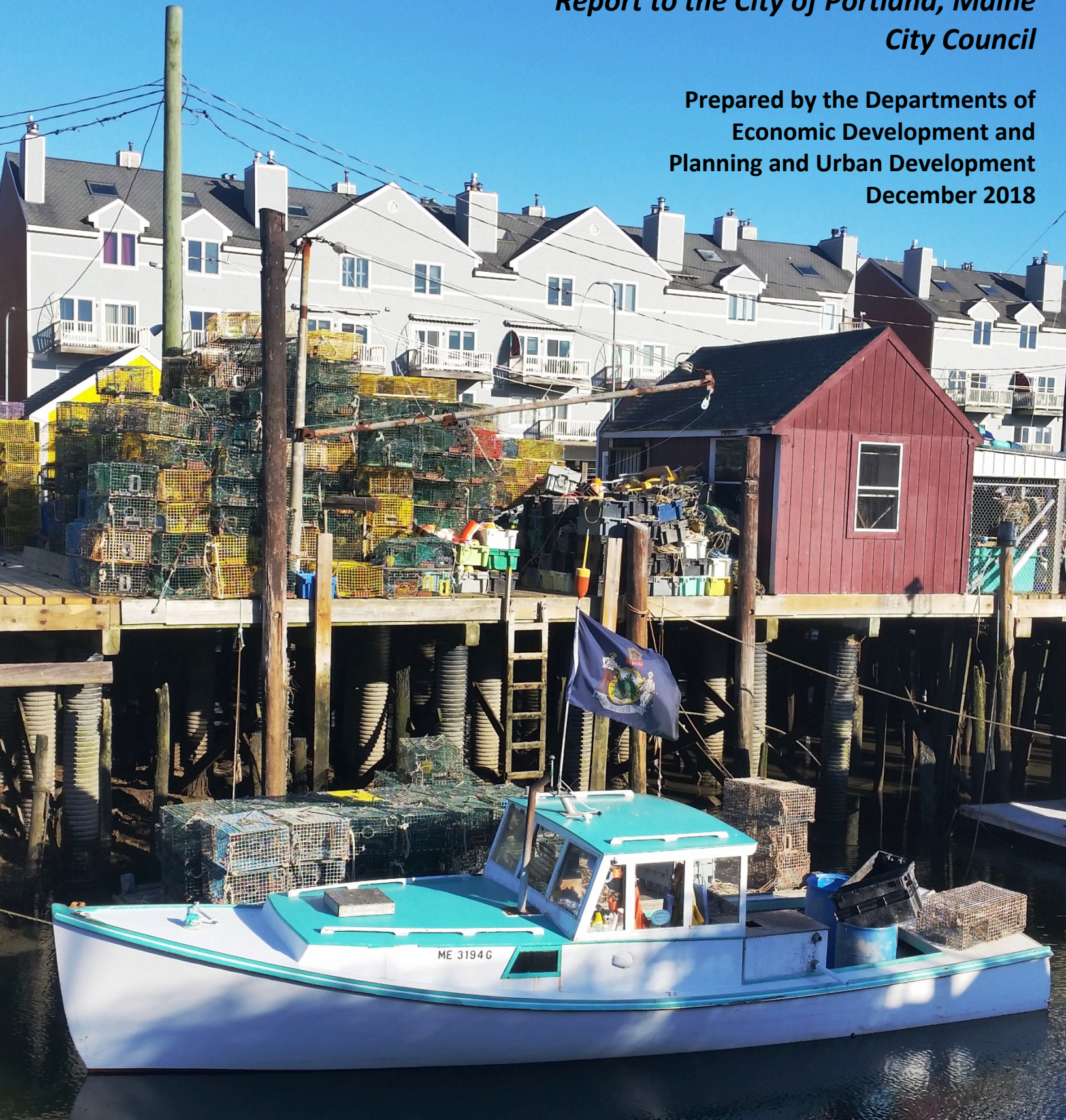
1. **Welcome and Introductions:**
Jon Jennings, City Manager, Chair
2. **Scope of Work**
3. **Waterfront Central Zone 2018 Marine Use Inventory Update:**
Bill Needelman, Waterfront Coordinator
WCZ 2018 Inventory Final Report, 1-2-2019
4. **Round Table on Initial Thoughts:**
Workgroup Members
5. **Next steps**

Waterfront Central Zone 2018 Marine Use Inventory



*Report to the City of Portland, Maine
City Council*

**Prepared by the Departments of
Economic Development and
Planning and Urban Development
December 2018**



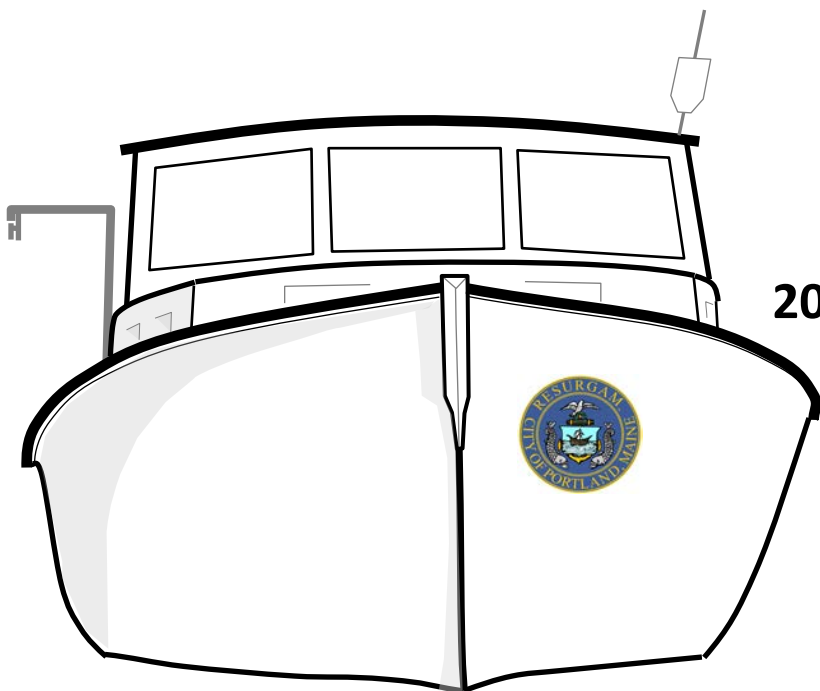
Waterfront Central Zone 2018

Marine Use Inventory:

Credits:

- Jon P. Jennings, City Manager
- Greg Mitchell, Economic Development Director
- Bill Needelman, Waterfront Coordinator, primary author
- Jeff Levine, Planning and Urban Development Director
- Tuck O'Brien, Planning Director
- James Dealaman, Administrative Officer, Planning and Urban Development
- Marguerite Fleming, Intern

Thanks to the owners and managers of piers and wharfs in the Central Waterfront who shared time and information in the generation of this report. December 2018



Waterfront Central Zone 2018 Marine Use Inventory December 2018

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Waterfront Central Zone 2018 Marine Use Inventory: Executive Summary

On December 20, 2010, the Portland City Council passed significant changes to the text of the Waterfront Central Zone (WCZ) allowing expanded non-marine use and development on Portland's Waterfront. When passing the 2010 zoning, the City Council required that the City conduct a periodic inventory of uses to understand the new regulation's impacts on marine industry and investment on the piers. Understanding the trends in marine use is important. This information helps the community understand: 1. The footprint of marine industry in the WCZ; 2. The extent of vacancies; and, 3. The growth of non-marine activity. Data is separated for first floor **buildings** and **open space** outside of the "Non-Marine Use Overlay Zone."

Building Results

As reported in 2012, the ground floors of buildings are still predominantly available to marine uses.

The percentage of space available to marine use (Active MU + Vacant) is down from +/-75% of space in 2012 to +/-67% in 2018. ***The percentage shift results mostly from conversion of vacant space to non-marine*** space with the largest change found on Maine Wharf (Scales.) The overall reported area of ***marine use building space has decreased marginally (less than 3%)*** from 2012 to 2018, with a corresponding dip in the percentage of first floor building space available to marine use.

Open Space Results

Like with the first floor building space above, open space in the inventory area has remained strongly dedicated to marine use in the WCZ. ***Marine Use on open areas has reduced by +/-60,000 sq ft (+/-8%)*** with a large portion of this reduction ***resulting from the recent vacancy of Berlin Mills Wharf***. Additional incremental loss of open space to non-marine parking is found throughout the easterly portion of the zone, some of which likely results from better reporting with this inventory.

Non-Marine use open area has increased by almost 24,000 sq ft. This reported increase is found imbedded in many properties, including:

- Better reporting of open space data – including parking allocations;
- Incremental increase in non-marine parking; and,
- Expansion of outside restaurant seating on Maine Wharf and Portland Pier.

Concluding Remarks:

As found in 2012, Waterfront Central Zone remains a center for marine industry, but continues to evolve as allowed under the WCZ text. The first floor **Building Space** results above demonstrate the zone policies working as they were intended. Vacant space has been filled with non-marine use (only after having been advertised to marine use as a condition of zoning.) **Open Space** results offer a more complicated picture than interior space – showing both an increase in vacancy and simultaneous increase in non-marine use. Parking uses, both marine and non-marine, have had a significant influence on the results herein.

Forward.

The City of Portland Departments of Economic Development and Planning and Urban Development are pleased to provide the City Council with the 2018 Waterfront Central Zone (WCZ) Marine Use inventory. This third version of the inventory has been a long time coming and we, as the responsible staff, apologize for the delay. Portland's waterfront has been a busy place for the past few years, and while we never took our eyes off the waterfront and its goings on, it does not excuse our failure in bringing important information to the Council in a timely manner.

Since the last presentation of a WCZ Inventory in 2013, the Portland Waterfront has experienced changes comparable to other parts of our community during this historic development cycle. International ferry service between Nova Scotia and Maine has restarted – twice –and is again in transition. The City of Portland and the Portland Harbor Commission continue to explore solutions for the vexing problem of pier and berthing dredging. Regular container freight service between Portland and northern Europe has started, grown, and fostered deepening business, cultural, and educational connections between Maine and the north Atlantic. Portland Yacht Services has transitioned from a modest recreational boating facility on the Eastern Waterfront to a robust full service shipyard on the Western Waterfront. The Maine Yacht Center in East Deering has grown, thrived and expanded. Portland has hosted the western Atlantic's premier professional ocean sailing race, the Atlantic Cup, twice. Cruise ship landings have grown, surpassing expectations for success, and cementing the cruise industry as an indispensable component of the working waterfront. The City Council passed sweeping and balanced zoning amendments for the Western Waterfront, re-committing our community as a port city into the 21st century. Over 7500 linear feet of new berthing is under construction on the Eastern Waterfront at the Portland Company. We members of City staff who have worked with public and private entities to contribute toward the above achievements, and many others, are proud of these accomplishments.

The WCZ inventory is an important contribution to the above list. The inventory is not, however, the total picture. As directed by City code, the inventory answers the question of: *How do current uses compare with the 55% marine use requirement of the zone?* The geographic extent of the inventory is further limited to only those portions of the Central Waterfront away from Commercial Street and outside of the "Non-Marine Use Overlay Zone" where the 55% requirement applies. Current concerns raised by the fishing community may warrant a broader evaluation of needs of the marine economy that lies beyond the scope of this effort.

Even with the limitations of the scope, this is valuable and useful information. What did we learn? We confirmed that the Central Waterfront remains a center of marine industry and

employment, consistent with the purpose of the zone and the policies of the Comprehensive Plan. The following data points stand out:

- 67% of first floor interior space is occupied by a marine use, or vacant and available to marine use.
- 5% of interior first floor space is vacant, down from 10% in 2012, showing a tightening of use within the zone
- 81% of open space (land and pier deck not covered by a building or common drive) is used or available to marine use.
- Many of the non-marine uses that are expanding, consistent with current rules, are tightly aligned with marine industries (seafood restaurants, Sea Bags, ...)
- Parking uses have increased, taking space and placing pressure on fishing and other uses in the zone.

These results do not answer the question of whether 55% is *sufficient* for marine industries. That policy discussion was well explored prior to passage of the 2010 WCZ amendments. Given the passage of time and the current building vacancy rate of +/-5%, the amount of building space *needed* for marine use may warrant further discussion in the near future. Open space for gear storage, gear maintenance, and crew parking is clearly a need now. Whether these needs are growing, stable, or contracting is unclear. However, industries such as aquaculture are expanding, landings at the Portland Fish Exchange appear to have reached their nadir and will hopefully begin to rise, and lobster remains the vital backbone of the waterfront. While the working waterfront continues to occupy a majority of buildings and pier space in the Central Waterfront, anecdotes from marine industry representatives make clear that many are feeling a squeeze and worry about their future access to the piers.

The City of Portland hears the concerns of fishermen and marine industry. The ongoing work by the City and the Greater Portland Council of Governments on a *Commercial Street Operations and Master Plan* is a timely commitment to address the functional access concerns expressed by many.

Transportation studies alone will not address the genuine concerns of fishermen. Likewise, abandonment of non-marine use will not benefit piers that require ongoing maintenance to provide fisheries access. Other issues, including dredging and climate change adaption, remain as ongoing efforts and calls to action. Committed to support traditional marine industries and their growth in Portland Harbor, the City stands ready to engage with all community members to discover the appropriate, fair, and functional balance for preservation of our treasured working waterfront.

We all have work to do.

**Vision Statement for the Central
Waterfront**

Commercial marine use is the highest and best use of waterfront land in the Central Waterfront. Preserving the waterfront for these uses should be a top priority and guiding principle for the City.

Development in the Central Waterfront will achieve a balance where non-marine economic development benefits the piers, Commercial Street, the Waterfront and the City by sustaining marine infrastructure, protecting opportunity for commercial marine activity, and promoting appropriate access by the public to views and activities in Portland Harbor.

WCZ Policy Statement, 2010

Order #101-10/11, passed as amended 12-20-10.

1. Introduction:

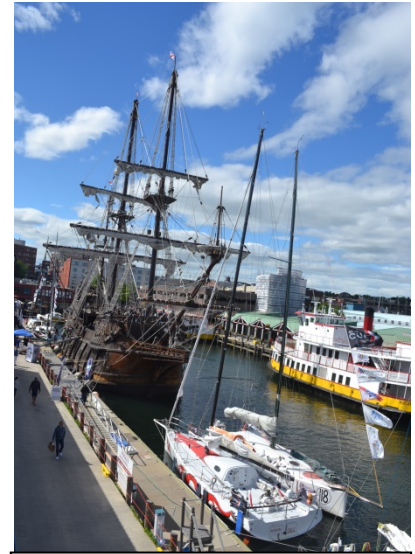
On December 20, 2010, the Portland City Council passed significant changes to the text of the Waterfront Central Zone (WCZ) allowing expanded non-marine use and development on Portland's Waterfront. When passing the 2010 zoning, the City Council required that the City conduct a periodic inventory of uses to understand the new regulation's impacts on marine industry and investment on the piers. In 2011, Planning staff submitted the baseline inventory report as a communication to the City Council. In 2013, the report was updated with improved data and updated to reflect 2012 development activity.

This report documents information collected from 2013 to November 2018 and provides the year-to-year comparison of data from 2012. In addition to the use inventory, the Planning staff provides a compilation of building permit and site plan projects for the same time period to document significant improvements and development activity within the impacted portions of the zone. The Economic Development staff and Planning staff submit this report in compliance with the Council's requirements (City Code, Chapter 14, Land Use Ordinance, Section 14-311.)



2. Background

The WCZ text regulates land use on Portland's waterfront in the areas located between but not including the Maine State Pier and the International Marine Terminal. The WCZ is home to the Portland Fish Pier, 14 private piers, the Gulf of Maine Research Institute, the majority of the city's commercial fishing fleet, fish processing and sales, lobster bait distributors, lobster buyers, tourist excursion vessels, and multiple marine and non-marine businesses. The condition of private property ownership distinguishes the Central Waterfront from many urban harbors and underlays the policies implicit in the zoning text. Prior to the 2010 changes, zoning limited *new development* almost entirely to marine uses. Non-marine uses were restricted to certain *existing buildings*, concentrating such uses in upper floors and buildings located near Commercial Street. The 2010 zoning broadened the amount and types of non-marine uses allowed in *new or existing space* on the piers of Portland Harbor.



El Galeon de Andalucia and the Atlantic Cup, hosted by Maine Wharf. June 2016

The 2010 WCZ amendments included two significant components that impact the form and content of this inventory, including:

- The creation of a Non-marine Use Overlay Zone adjacent to Commercial Street; and,
- Allowance for 45% first floor non-marine use outside of the overlay.

At the time of the 2010 WCZ amendments adoption, City Councilors recognized the need for non-marine use revenues to support pier maintenance. Likewise, Councilors heard the concerns of the fishing industry representatives worried about loss of needed space to support industrial use. The requirement for an inventory of marine use outside of the overlay was drafted at the time of adoption to ensure that policy makers could understand the impacts of the amendments moving forward.

The 2011 WCZ inventory and additional background and the text of the new zoning are found at:
<http://www.portlandmaine.gov/DocumentCenter/View/3422/WCZ-Inventory-7-18-11?bidId=>

The 2012 WCZ inventory is found at:

<http://www.portlandmaine.gov/DocumentCenter/View/3423/WCZ-Inventory-June-2013?bidId=>

Background information on the 2010 WCZ rezoning process is at:

<http://www.portlandmaine.gov/DocumentCenter/View/3425/WCZ-Process-Summary-Presentation-from-CC-Workshop?bidId=>

A complete record of the 2010 approval process and extensive narrative was provided to the State of Maine DEP for approval under Shoreland Zoning. The DEP request document is at:

<http://www.portlandmaine.gov/DocumentCenter/View/3421/Maine-DEP-Request-for-Zone-Amendment-Approval?bidId=>

3. Intent of the Inventory:

The intent of the inventory is to document use trends as allowed under the 2010 WCZ regulations.

One of the key requirements of the 2010 WCZ text is that at least 55% of ground floor space (both interior and exterior) must be reserved for marine use for that portion of the zone located outside of the “Non-Marine Use Overlay Zone” (NMUOZ.) The NMUOZ is located along Commercial Street and permits 100% occupancy by specified non-marine use and development. The 55% marine use requirement applies to the balance of the zone, on the seaward side of the NMUOZ boundary. The intention of the 55% marine use requirement is to ensure that marine uses are retained and protected in the portions of the zone best suited to serve marine industry needs.

Land Use Code Section 14-311(a) requires that any non-marine use application must demonstrate adherence to the 55% marine use requirement by submitting an inventory of ground level uses to the Planning Authority. The Code further requires that the Planning Authority must compile and aggregate use inventories within the zone for reporting to the City Council. The specific text requiring use inventories is excerpted below:

14-311(a) 3.b. Uses inventoried: To demonstrate adherence to the 55% marine use requirement, the applicant shall submit to the planning authority, upon request, an inventory which lists each occupant (tenant or otherwise), as well as a map which depicts the location of each occupant. The map shall show all ground level space, including buildings, parking, open areas and submerged lands associated with the subject lot. For each occupant, the property owner must indicate the square footage of area occupied and whether the occupant is a marine use as defined herein. For vacant space, the last previous occupant shall be listed, along with the date of departure.

c. Applicants for site plan review or a change of use permit outside of the NMUOZ shall provide the planning authority with proof of compliance with the requirements of this section as a condition of approval.

d. The city planning authority shall compile and report inventories of ground level uses, as reported under (b) above, into an annual report of ground level uses and investment in the Central Waterfront. The report shall include an aggregated assessment of ground floor marine and non-marine use occupancy and a catalogue of marine infrastructure investment for the reporting period. The report shall be submitted to the City Council as a communication not less than once every calendar year.



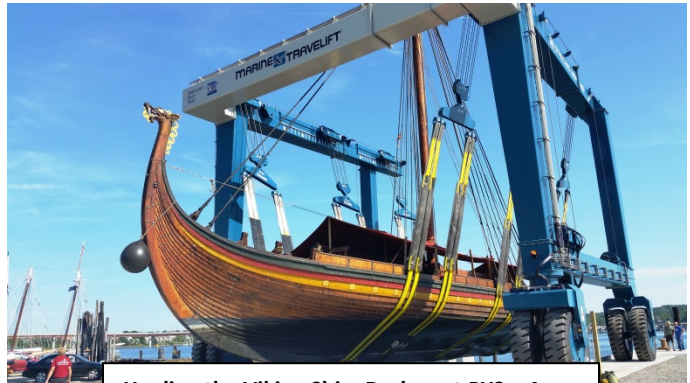
Development of the “Scales” building on Maine Wharf, 2014. Subject to the 55% rule

The above ordinance provisions apply only to those portions of the zone where first floor marine use is a requirement. Given that the NMUOZ is not restricted to a minimum percentage of marine use area, the properties within NMUOZ are not included within this inventory.

Readers should note that this document is not intended as a regulatory compliance tool. Applicants for new non-marine uses in the WCZ will need to map the NMUOZ boundary on their pier to show compliance with the 55% marine use requirement outside the NMUOZ, or for application of the 100% non-marine use allowance within the NMUOZ. Each applicant for change of use is expected to demonstrate compliance with the provisions of the WCZ, and City departments are not assuming that responsibility with this inventory.

In addition to excluding the NMUOZ, this inventory does not cover marine or non-marine activity under the following conditions:

- *Floating facilities.* Only Dimillo's floating restaurant is included as a counted element in the data below (the floating restaurant functions as a *building*.) Work floats, vessels, ramps, and other floating structures are not included.
- *Marine activity outside of the WCZ.* Marine activity and expansions in the Western Waterfront and Eastern Waterfront are not included. Over the timeframe covered in this inventory, significant expansion of marine industrial capacity and infrastructure has occurred on the Western Waterfront and further expansions are planned for the Eastern Waterfront. Changes within the WCZ should be considered within the context of the entire waterfront.



Hauling the Viking Ship, Draken at PYS. Aug. 2018. Western Waterfront expansions are not included within the WCZ inventory

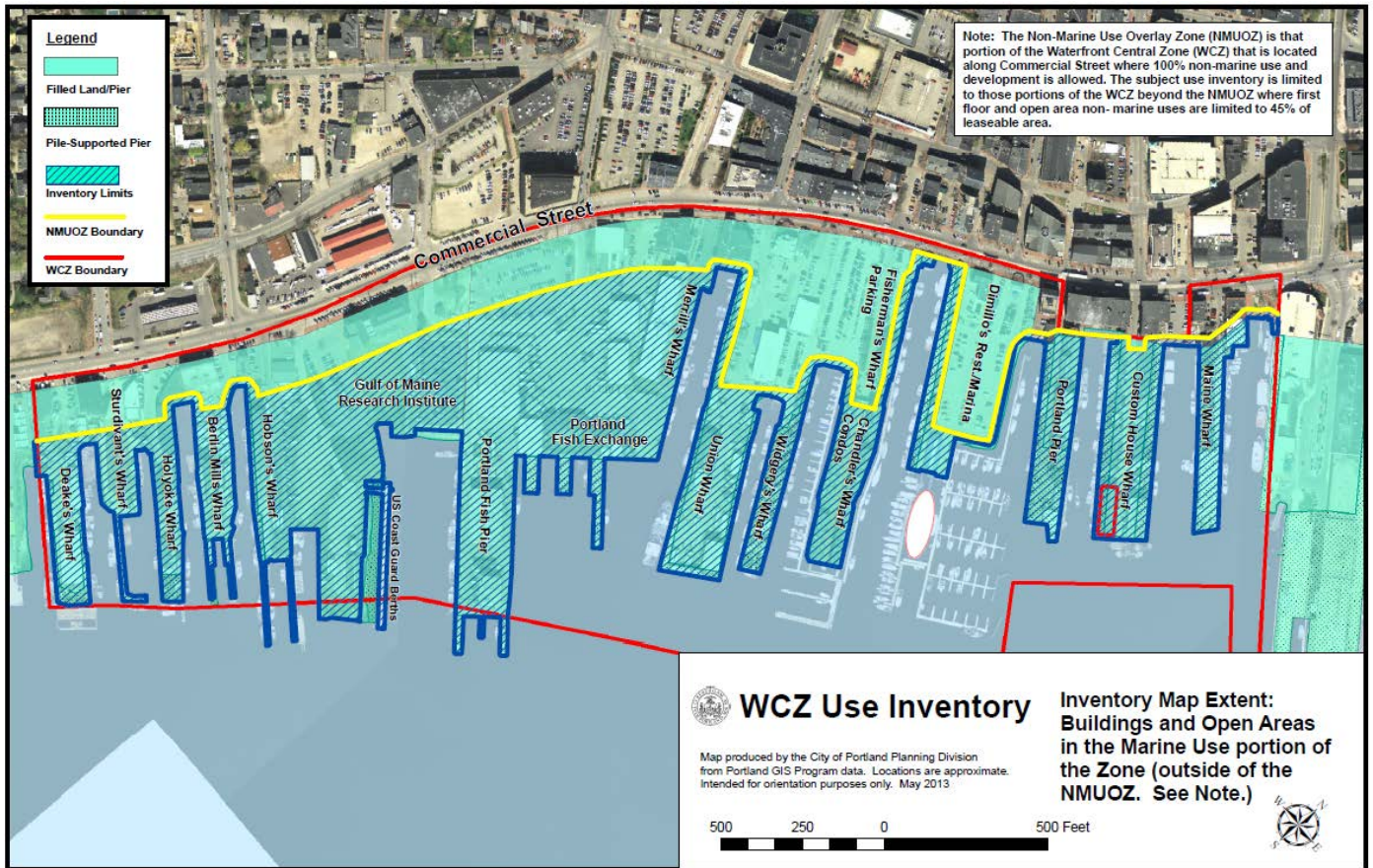


Improved floats, such as these recently installed at Portland Pier, increase marine use access, but are not accounted for in this inventory

4. Inventory Extent:

The inventory includes every building and property, or portions thereof, which are located within the WCZ and outside of the Non-Marine Use Overlay Zone (NMUOZ). Only ground level uses were mapped and counted, including buildings, pier deck, paved areas, and open space on filled land and pile supported piers.

The inventory only includes piers and filled land located outside of the Non-Marine Use Overlay Zone.



5. Methodology:

The current WCZ inventory reflects a snapshot in time concluding in November 2018.

Using the 2011 and 2012 inventories as a framework, the current inventory relies on three sources of information: direct observation by the Economic Development staff, pier owner and tenant inquiries, and City GIS program data (including 2018 aerial photography, *pictometry*.) Most pier inventories employed multiple data sources. A significant amount of judgement and estimation is needed to produce and compile these data. The estimates herein are reliable for the purpose of the inventory - identification of use distribution *trends* – and are best used in aggregate. As noted above, pier-by-pier regulatory compliance requires survey quality evaluation and is the responsibility of the property owner.

Mapping:

The first step in the process was to locate the NMUOZ boundary as the northerly extent of the inventory area. Section 14-306 of the WCZ text defines the NMUOZ boundary as:

“...parcels of land and piers within the waterfront central zone located on the landward side of a line established one hundred fifty (150) feet southerly from the southerly sideline of Commercial Street and modified as follows: the seaward limit of the NMUOZ extends to a line 500 feet southerly from the southerly sideline of Commercial Street in the area between the easterly sideline of Long Wharf to the westerly sideline of Union Wharf. Additionally, all areas subject to this provision are set back landward at least twenty-five (25) feet from the average high tide line of Portland Harbor...”

Essentially, the NMUOZ is located 150 feet south of Commercial Street, except between Union Wharf and Long Wharf, where the boundary is 500 feet south of Commercial Street. The line, however, does not extend over the water and is set back from high tide by 25 feet in all areas.

The NMUOZ boundary was mapped as a best estimate based on GIS Program data on the Commercial Street right of way and a previously mapped “filled land” boundary. When drawing the NMUOZ boundary, Economic Development staff estimated the 25-foot high water setback by measuring from visible landmarks such as seawall bulk heads, or used the previously mapped “filled land” boundary. A certain amount of approximation was needed as the “filled land” boundary is itself an estimate based on aerial photography and limited field observation.

Secondly, the seaward boundary of the inventory area was established from the edges of working piers, seawall bulkheads, and by property ownership. As with the NMUOZ, estimation was needed and errors are assumed.

Finally, every pier and property was separated individually with the results of each combined into an aggregate for the



The recently constructed office building on Union Wharf is located in the NMUOZ.
November 2018



Rebuilt section of Union Wharf (\$1.8 Million) satisfied the Marine Infrastructure Investment requirement for the above building in the NMUOZ. October 2017

zone. The “filled land” and “pile supported piers” layers from the City GIS Program were combined with City taxation parcel information to identify individual piers. Economic Development staff amended the pier perimeters as appropriate based on aerial photos and field observations. Slight variations in area calculations between 2012 and 2018 occurred with updated 2018 aerial “pictometry” providing more details informing the estimated pier boundary polygons.

Individual building polygons were taken from GIS program data, edited to subtract out building space within the NMUOZ, and corrected for errors observed from updated 2018 aerial pictometry.

Measurement Precision: Staff adjusted the filled land boundary as necessary to reflect conditions evident from aerial photos, corroborated with field observations. While the inventory spread sheets report observed results to the nearest whole square foot, individual parcel results are best rounded to the nearest 1000 square feet for land and 100 square feet for each building.

Occupancy and Use:

In updating the Inventory from 2012 to 2018, Economic Development staff conducted multiple walks within the zone using the 2012 inventory results used as a guide. Each building was observed for visual change or obvious signs of vacancy (boarded up, “For Lease” signs...) While this method may have missed some vacant space, staff is confident that significant changes were observed and captured for this inventory. Emailed inquiries to individual pier property owners helped to fine tune field observations.

Reporting Results:

The resulting inventory is essentially a series of individual pier maps with an accompanying spreadsheet of tabled square footage data. Properties, separated by ownership, are shown with bold lines and each parcel is numbered with a black numeral. Likewise, each building or applicable portion of building is shown as a red polygon. Buildings are numbered on the map in red and yellow. Where a building is bisected by the NMUOZ boundary, only that portion of the building outside of the NMUOZ is counted. Such buildings are noted with a “p” for “partial.”)

The inventory spreadsheet is keyed to each building and parcel by number. The spreadsheet groups buildings and parcels by pier. Certain piers have more than one parcel and the inventory is additionally separated by ownership as far as it is known. For quality control, each pier owner was provided a copy of their specific results in the form of an individual pier map with its specific tabled information excerpted.



Use of floats due to lack of yard space on
Merrill's Wharf, 2013

Building spaces were compiled according to the following categories.

Building Footprint Area	Building Footprint Area -Pier totals	Active Marine Use Building Area	Vacant Building Area, Avail to marine use	Building Area Avail to Marine use (Active Marine plus Vacant)	Active Non-marine use Building Area	% Building Area Avail to Marine Use (Active marine use plus vacant)
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“Marine Uses” in this inventory are the permitted uses listed under WCZ section 14-307(a) and conditional uses listed under 14-308(a).

Building vacancies were tallied where reported by pier owners or observed, but it is assumed that some of the areas designated as “Active Marine Use Building Area” may be vacant. Given that the WCZ text requires that vacant space is offered to marine tenants as a priority (with a 60 day marketing period,) the “Building Area Avail to Marine use” is calculated as an important indicator for tracking.

The percentage of space available to marine uses is the regulated figure stipulated in the code and is calculated by the following formula:

$$\begin{array}{c}
 \text{Active marine use building area + vacant building area} \\
 \hline
 \text{Total building footprint area} \\
 \times \\
 100 \\
 = \\
 \text{\%building area available to marine use}
 \end{array}$$

Note: Un-leaseable common space was subtracted from the basis for the Merrills Wharf (Pierce Atwood) building. Merrills Wharf from Union Wharf. 2014



Open spaces were treated similarly to building space.

Land Pier Area	Common Circulation Drive Area	Open Area - net (Land Pier area minus Com Drive - Building footprint)	Active Marine Use Open Area	Vacant Open Area, Avail to Marine use	Open Area Avail to Marine use (Active Marine plus Vacant)	Active Non-Marine Use Open Area	% Open Area Avail to Marine use (Active marine use plus vacant)
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When calculating the amount of land/pier area, the zone text requires that “common circulation drives” are subtracted from the total open space prior to calculating use percentages. Such driveways, as defined in the WCZ, were estimated from aerial photos and direct observation, and were mapped for subtraction from the total open space.

The percentage of open area available to marine use was calculated by the formula below. For the purpose of this calculation, “pier area” includes filled land and pile supported pier capable of lease for active use.

$$\begin{array}{c}
 \text{Active marine use area + vacant pier area} \\
 \hline
 \text{Total pier area - common circulation drive areas - building footprint area} \\
 \times \\
 100 \\
 = \\
 \text{\% open area available to marine use}
 \end{array}$$

Un-leasable open space, which was not a common circulation driveway, was combined with the adjacent use with which it was most closely related. For example, landscaping adjacent to a non-marine use parking lot was counted as non-marine use open space. Likewise, open area serving as circulation to only marine uses was counted as marine use space.

Note: Un-leaseable drainage areas were subtracted from the basis for the Merrills Wharf (Pierce Atwood) property.

A certain amount of approximation was necessary to create this inventory – both in the mapped features and in the use assumptions for certain buildings and open areas. For example, it was easier to identify non-marine uses than to differentiate between active marine use and vacant space. Casual storage of marine gear and refuse could be either a leased “active” use, or a “vacant” un-leased space currently filled with transient materials. There is greater reliability in the numbers reported as areas “Available to Marine Use” than in the split between vacancies and active marine uses.

When assigning uses to areas such as common circulation drives in particular, Economic Development staff employed a common sense, best judgment, approach given that the “drives” are more use patterns than constructed features on certain piers.

6. Notes on Year-to-Year Comparisons:

The 2012 aerial photography was updated using more detailed 2018 pictometry. The base maps of certain piers and the footprints of some buildings were adjusted to reflect the newer, improved imagery.

7. Building Results

As reported in 2012, after separating the NMUOZ portions of the zone the remaining ground floors of buildings are still predominantly available to marine uses.

There are approximately **381,000 sq ft total of ground floor building space** in the WCZ outside of the NMUOZ. This number is marginally more than the +/-371,000 sq ft reported in 2012, with the difference attributed to:

- rebuilding of space on Custom House Wharf now occupied by Seabags,
- better reporting of shed space on GMRI/Coast Guard site,
- adding a small portion of Becky's Diner located within 25' of high tide,
- better reporting of Merrills Wharf interior space with data provided by the owner,
- the addition of permanent sheds and bar areas at Portland Lobster Company, and
- minor deviations from 2012 likely resulting from new aerial imagery.

The above additions of space were partially offset by marginal reductions of shed space on Widgery Wharf and minor deviations resulting from new aerial imagery throughout the zone.

Total active marine use of interior space is estimated at 236,000 sq ft, which is a decrease of approximately 6000 sq ft from 2012.

Increases in marine use interior space include:

- the conversion of the former Lilly Law Office building to a Dimillo's Yacht sales use accounted for 3400sq ft of net increase,



Rebuilt portion of building on Custom House Wharf housing Sea Bags. November 2018

- conversion on Sturdivant Wharf of +/-11,000 sq ft of reported vacant space to active marine use, and
- Additional marine use office space on Merrills Wharf.

These gains were offset by:

- new vacancy of space on Berlin Mills Wharf,
- better reporting of +/-3000 sq ft of non-marine office on Union Wharf, and
- better reporting of vacancy at the Marine Trade Center on the Portland Fish Pier (subtracted from marine use reported in 2012.)
- Conversion of +/- 9500 sq ft of vacant space on Maine Wharf to non-marine use in the Scales building



The 2014 Scales building on Maine Wharf replaced a vacant structure which had been condemned for structural failure. November 2018

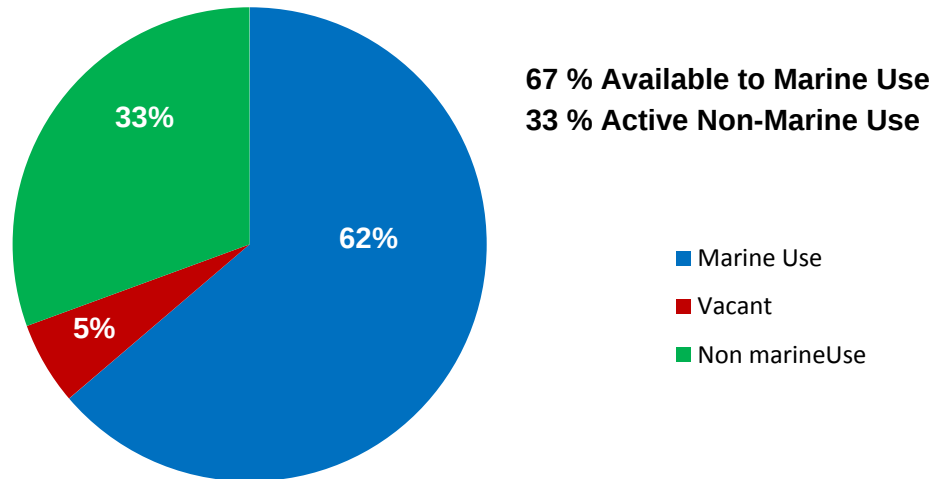
Total vacancy of interior space is down +/-15,000 sq ft from 2012 to approximately 5% of total interior space. Reduced vacancy is mostly due to:

- reporting of occupancy of space on Sturdivants Wharf noted above,
- Construction of the Scales building on Maine Wharf which replaced a similarly sized vacant structure (vacant due to structural failure and condemnation,)
- Incremental vacancies on Deakes, Holyoke, Berlin Mills, and Merrill's Wharfs, and
- +/-8200 sq ft of vacancy at the Marine Trade Center on the Portland Fish Pier.

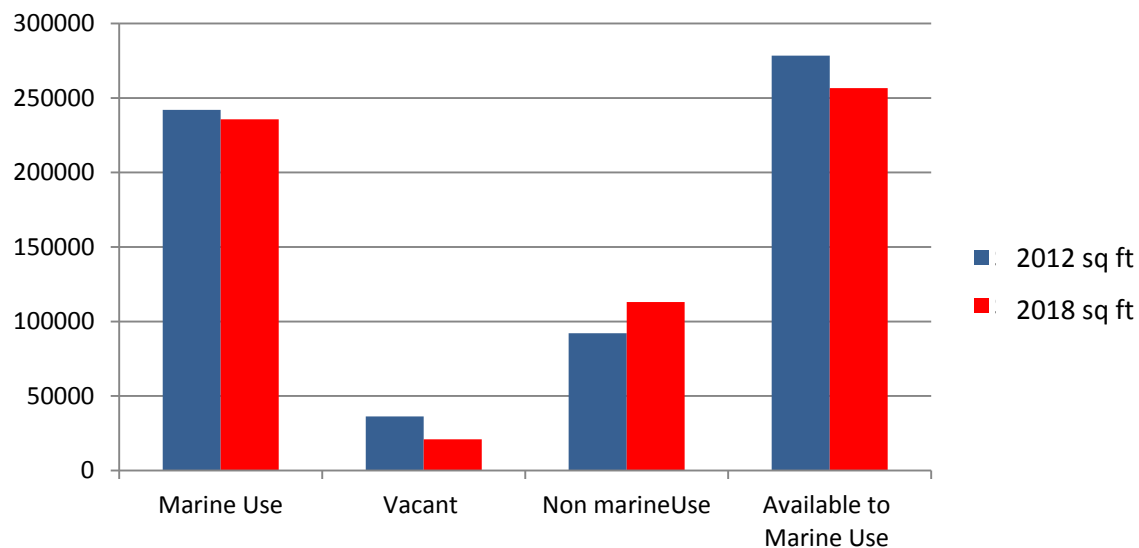
As noted in previous WCZ inventory reports, space that is apparently used by marine industry for casual storage may in fact be "vacant" from a tenancy perspective.

The percentage of space available to marine use (Active MU + Vacant) is down from +/-75% of space in 2012 to +/-67% in 2018.

Buildings	Marine Use	Vacant	Non marine-Use	Available to Marine Use	% Building Area Available to Marine Use
2012	242058	36314	92088	278372	75%
2018	235698	20926	113086	256624	67%



2018 BUILDING USE TOTALS



2012 to 2018 1st FLOOR BUILDING SPACE TOTALS

The overall reported area of marine use building space has decreased marginally, with a corresponding dip in the percentage of first floor building space available to marine use. The percentage shift results mostly from conversion of vacant space to non-marine space with the largest change found on Maine Wharf (Scales.) Conversion of marine use to non-marine use is seen to a lesser extent on Portland Pier (the restaurant portion of Luke's Lobster, under construction) and on Custom House Wharf (with the expansion of Sea Bags,) and small office conversions (Union Wharf, Holyoke Wharf.) Other non-marine uses expanded into new sheds or seasonal structures (Portland Lobster Company.) The balance of expansion of non-marine use is comprised of better reporting (Holyoke Wharf) and small scaled conversions from marine to non-marine (Union Wharf.)

It is an interesting side note that much of the expansion of non-marine use in the above list (Scales, Luke's, Seabags) are all tightly aligned with and dependent on marine industry.

Readers should note that the +/-33% non-marine ground floor space result is highly influenced by the large footprints of 1980's condominium complexes on Chandler's Wharf and Portland Pier. When the area of offices and condominiums of Portland Pier (buildings 52, 53, and 54p) are added to the area of Chandler's Wharf condominiums (building complex 42p) the resulting 55,000 sq ft of area represents nearly half of the total active non-marine use building space in the inventoried space. In short, the largest scale encroachment of non-marine uses in the zone occurred prior to the non-marine development moratorium referendum in 1987.

As in 2012, there continues to be a geographic concentration of non-marine space in the eastern portion of the zone adjacent to the Old Port.

8. Open Space

Like with the first floor building space above, open space in the inventory area has remained strongly dedicated to marine use in the WCZ.

The total net open area (piers and filled land available after subtracting out building footprints and common areas) is slightly smaller (by +/-3000 sq ft) in the current reporting. The current **total net open area inventoried is +/-963,000 sq ft (+/-22 acres.)** While mapping variability noted above may account for some of this loss, there was a comparable portion of Custom House Wharf subtracted from the total land/pier area adjacent to Building 59 due to loss/demolition. Given the condition of the wharf in this area, this portion of pier has been unused for many years and should have been reported as vacant in previous inventories.

Marine Use on open areas has reduced by +/-60,000 sq ft. A large portion of this reduction came from the recent vacancy of Berlin Mills Wharf. Additional incremental loss of open space to non-marine parking is found throughout the easterly portion of the zone, some of which likely results from better reporting with this inventory.

Vacancy has increased by over 27,000 sq ft, which is largely if not entirely due to Portland Yacht Service's move from Berlin Mills Wharf (formerly Gowen Marine) to the Western Waterfront. Berlin Mills wharf is for sale as of the writing of this report. Two "vacant" lots on the Portland Fish Pier are located within the NMUOZ and not included in this inventory.



The boat yard activity on Berlin Mills Wharf shown on this early 2018 image has recently moved to the PYS facility on the Western Waterfront. The vacancy of Berlin Mills Wharf is a significant influence on the Open Space results

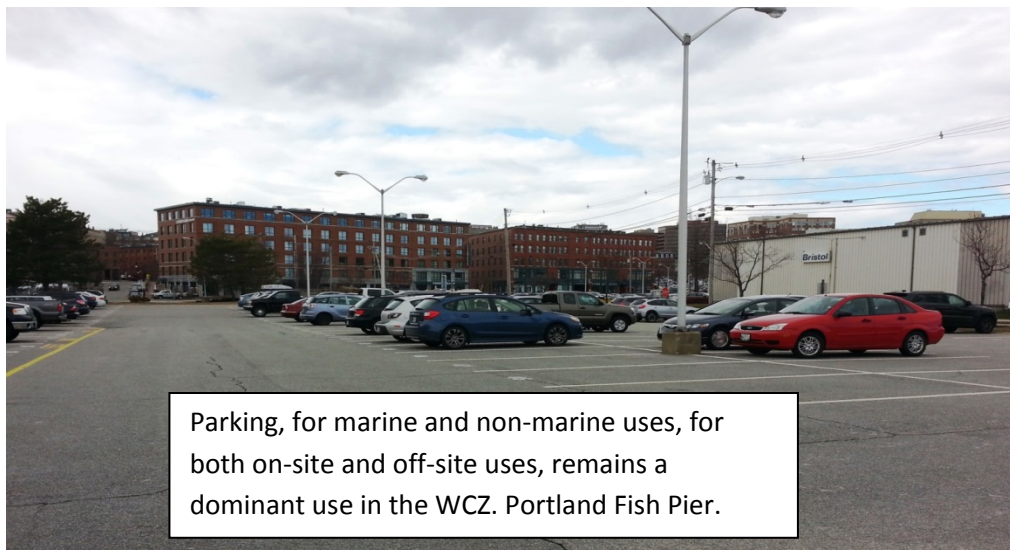
Non-Marine use open area has increased by almost 24,000 sq ft. This reported increase is found imbedded in many properties, including:

- Better reporting of land area on the Portland Fish Pier.
- Better reporting of non-marine parking on Berlin Mills Wharf (400 Commercial St.)
- Incremental increase in non-marine parking on Merrill's Wharf, Widgery Wharf.
- A more complete reporting of non-marine use space along the perimeter of the Long Wharf (Dimillo's) parking lot, and
- Expansion of outside restaurant seating on Maine Wharf and Portland Pier.

In aggregate, the net open area available to marine use has decreased from +/- 813,000 sq ft to less than 781,000 sq ft or from 84% to 81% of total respectively (a reduction of +/- 33,000 sq ft or approximately three fourths of an acre.) 10% of this decrease is seen in an actual reduction of the basis land/pier area within the inventory, including the demolished/abandoned section of pier noted above on Custom House Wharf. Better reporting and actual increases in **non-marine parking** across the zone appear to have combined with modest expansion of outside restaurant seating at Scales (Maine Wharf) and Luke's Lobster (Portland Pier) to explain the reduction in space available to marine use.



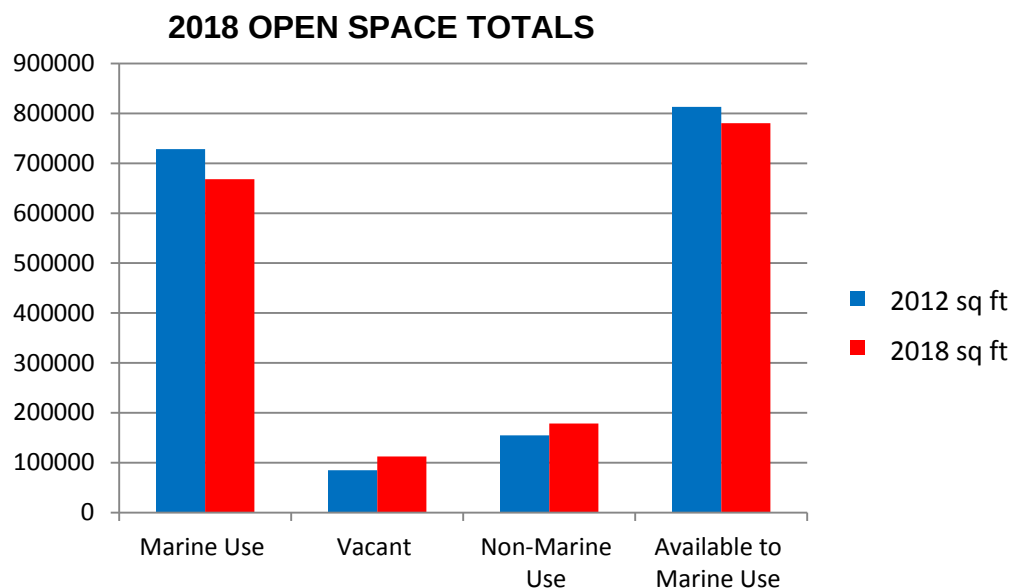
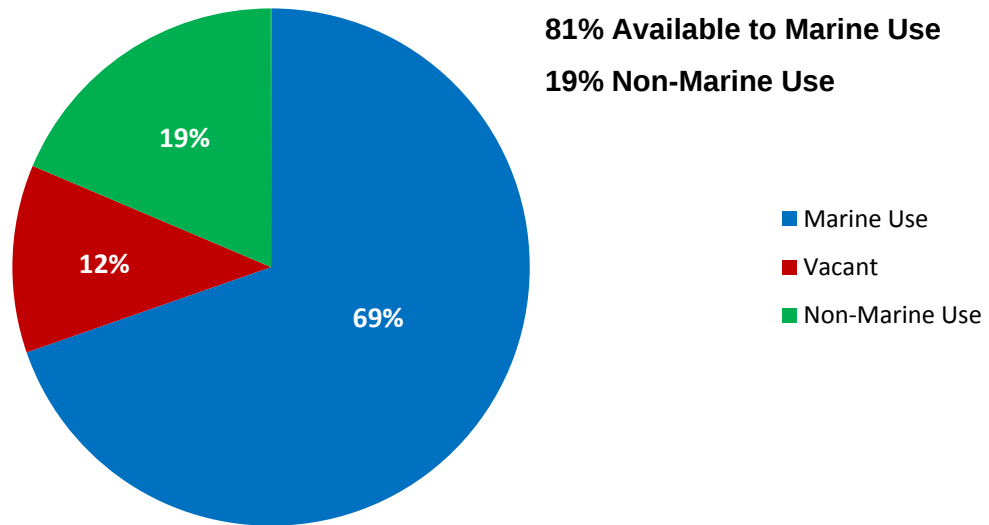
Restaurant seating, such as at Scales on Maine Wharf, appear to have had less impact than parking expansions on the amount of open space available. November 2018



Parking, for marine and non-marine uses, for both on-site and off-site uses, remains a dominant use in the WCZ. Portland Fish Pier.

The 81% total open area available to marine use is well within the 55% per pier minimum established within the WCZ zoning text.

Land/Piers Open space	Marine Use	Vacant	Non-Marine Use	Available to Marine Use	% Open area available to Marine Use
2012	728310	84905	154789	813215	84%
2018	668165	112362	178578	780527	81%



2012 to 2018 1st OPEN SPACE TOTALS

8. Concluding Remarks:

As found in 2012, Waterfront Central Zone remains a center for marine industry, but will continue to evolve as allowed under the WCZ text.

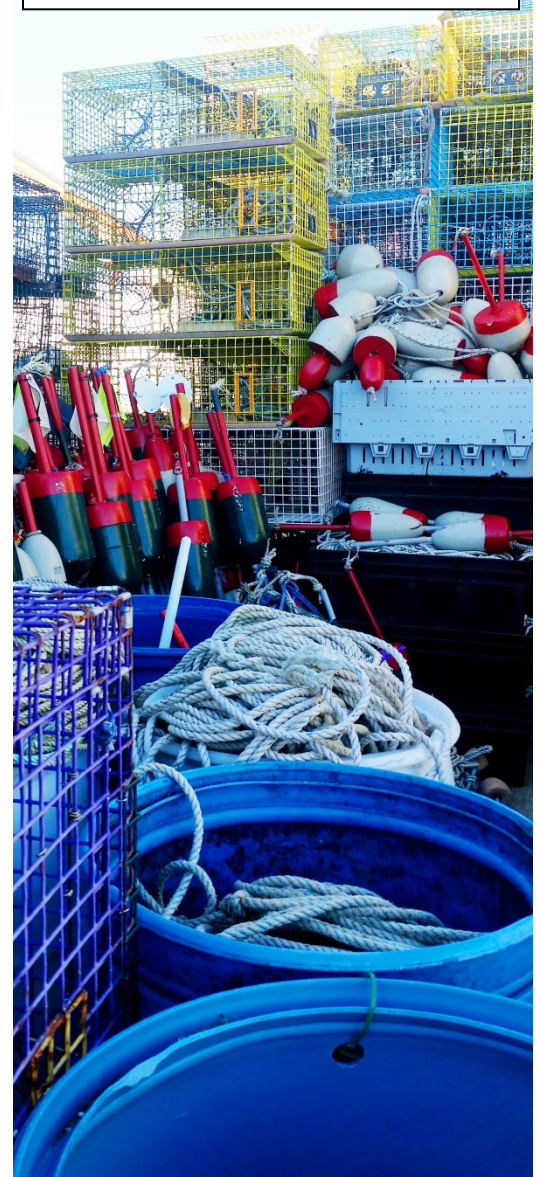
The first floor **Building Space** results above demonstrate the zone policies working as they were intended. Vacant space has been filled with non-marine use (only after having been advertised to marine use as a condition of zoning.) The shift **from** vacant to non-marine use influences the percentage of space available to marine use, but has not decreased the actual amount of marine use to percentages below the 55% requirement of the WCZ text.

Open Space results offer a more complicated picture than interior space – showing both an increase in vacancy and simultaneous increase in non-marine use. Meanwhile, marine use has dropped more significantly than interior building space (in square footage measure, recognizing that *the larger basis results in a smaller percentage decrease* in open space available for marine use.)

Clearly parking uses, both marine and non-marine, have had a significant influence on the results herein. Observations by staff while conducting this inventory suggest that commercial parking (both available to the public, and for off-site monthly non-marine uses) appears to have increased recently. Who is using this parking? That is difficult to discern. Distinguishing off-site parkers from on-site parkers is not possible from casual observation, nor is separating grandfathered legal spaces from more recent expansions that are inconsistent with current zoning. Further exploration of parking use and potential enforcement action may be warranted.

The loss of casual storage and yard space appears to be the victim of increases in parking supply. It is beyond the scope of this inventory to discover if the loss of casual storage and yard space has resulted from a filling of vacancy, or a displacement of active marine use. Regardless, anecdotes provided by fish harvesters would indicate a general tightening of space available. Recent

Lobster storage on Union Wharf. Union Wharf has more space for marine gear than most properties in the WCZ. Dec. 2018



applications to the Portland Board of Harbor Commissioners to permit free floating service rafts, not attached to wharfs, for fishing gear would indicate a near desperate need for space to stage and maintain fishing gear adjacent to the water.

Readers should note that the aggregated Open Space results here are significantly influenced by the recent vacancy of Berlin Mills Wharf. One might reasonably lament the loss of the full service boat yard use on Berlin Mills Wharf if viewed in isolation; however, this use has not been lost to the harbor. The long-standing boat yard use on the wharf has relocated to the Western Waterfront at the larger and more robust Portland Shipyard/Yacht Services facility. It is also worth noting, that in the 5 years since this inventory was updated, vessel repair and boat yard services have also increased at the Maine Yacht Center in East Deering.

The raw percentage of interior space available is likely not as important to marine users as the type of space provided. Proximity to vessel loading, parking availability, access for truck and fork lift loading, utility access, and a myriad of other use-specific issues all influence marine use siting decisions. Above all, price per square foot and compatibility between tenant and land lord are paramount – issues outside the control of municipal land use control.

These results do not answer the question of whether 55% is **sufficient** for marine industries. That policy discussion was well explored prior to passage of the 2010 WCZ amendments. Given the passage of time and the current building vacancy rate of +/-5%, the amount of building space **needed** for marine use may warrant further discussion in the near future. Open space for gear storage, gear maintenance, and crew parking is clearly a need now. Whether these needs are growing, stable, or contracting is unclear. However, industries such as aquaculture are expanding, landings at the Portland Fish Exchange appear to have reached their nadir and will hopefully begin to rise, and lobster remains the vital backbone of the waterfront. The City of Portland remains committed to support these industries and their growth in Portland Harbor.

Attachments:

1. Development Activity Summary
2. Summary Table of Results
3. Master Inventory Map of the Waterfront Central Zone



TO: Portland City Council

FROM: James Dealaman, Administrative Officer, Planning and Urban Development

DATE: December 6, 2018

SUBJECT: Development Activity Summary: WCZ Marine Use Inventory (December 2018)

Summary: As provided in chapter 14-311(d), the city planning authority is tasked with cataloguing marine infrastructure investment. In order to provide the most accurate snapshot of growth in the Waterfront Central Zone (WCZ) specific to Marine infrastructure investment, staff have compiled the most recent Permitting and Assessing data in the WCZ outside of the Non-Marine Use Overlay Zone (NMUOZ) to reflect trends over a five-year period.

- 1) **Valuation Data** – To show investment in the WCZ, issued permit data from 2013 – November 2018 was used across a variety of permit types when sufficiently available and grouped or renamed as appropriate. The permitting data is based solely upon the reported cost of work provided at the time each permit application is submitted. The following groups will be provided to indicate the amount in dollars invested:

Commercial and Residential Construction (*e.g. repair, building maintenance, installation, change of use renovations, alterations, additions, etc.*)

Pier Infrastructure (*e.g. installation or replacement of pilings/floats or piles, pile caps, deck, fender system, etc.*)

Building Upgrades (*e.g. Installation or replacement of HVAC, hood systems, tank, etc.*)

Fire Suppression (*e.g. Installation or replacement of sprinkler system, fire alarms, etc.*)

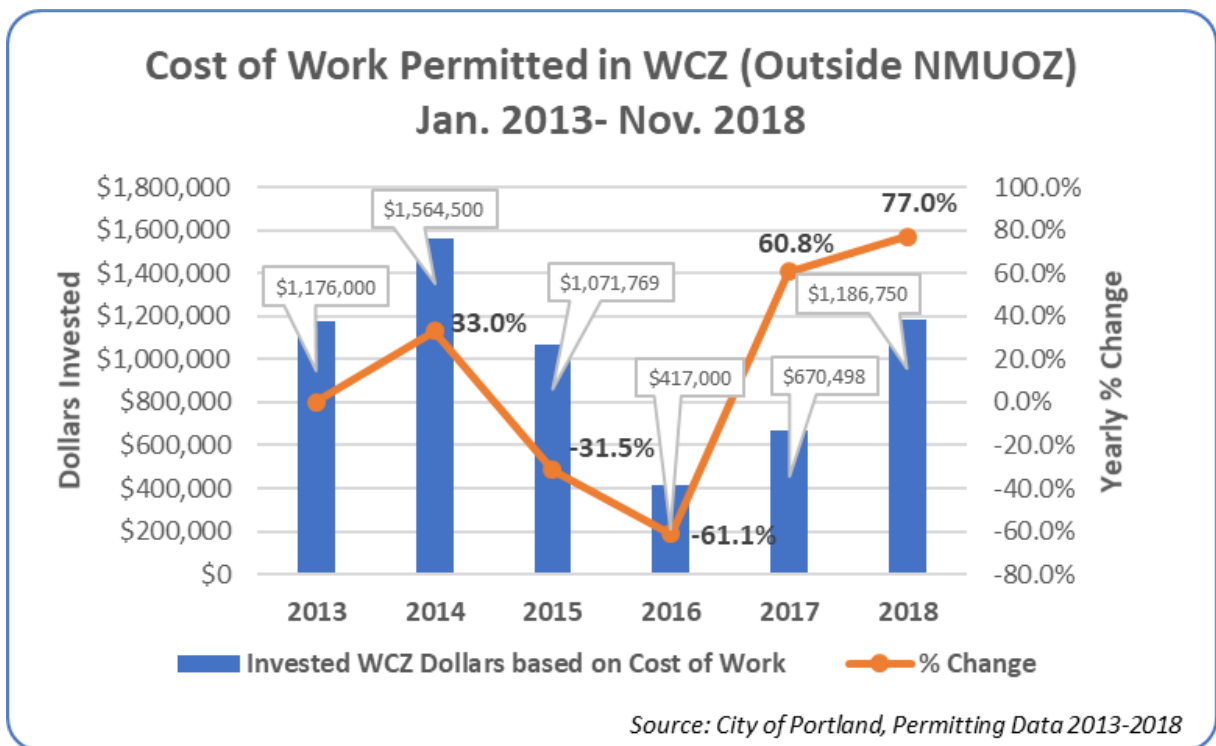
[Please note: permits types for exclusively electrical work, plumbing, outdoor seating and signage were not included due to insufficient valuation data available.]

Selected Permit Types Cost of Work (Outside the NMUOZ) 2013-18		
Permit Group	Total Valuation	% of Total
Commercial Construction	\$3,910,689	64.3%
Residential Construction	\$238,000	3.9%
Pier Infrastructure	\$700,000	11.5%
Building Upgrades	\$993,528	16.3%
Fire Suppression	\$244,300	4.0%
Total	\$6,086,517	
<i>(City of Portland Permitting Data 2013-18)</i>		

The largest share of investment (64.3%) being observed is found in the Commercial Construction types of permits which generally a focus on updating buildings either by repair, change of use renovations, alterations or additions, in an area where the average building was built around 1964, according to parcel data.

Similarly, the second largest area of investment is found in Building Upgrades, with HVAC installation representing just over 63 percent, hood installation with 23 percent, and tank replacement at nearly 14 percent of all Building Upgrades.

The total estimated cost of work reported in the WCZ (outside of the NMUOZ) is in the ballpark of more than \$6 million dollars since 2013.



- 2) **Square Footage Data** – In order to best show square footage trends over a five-year period, Assessor's data was selected from the 2012 and 2017 tax rolls in order to overcome the challenges of tracking square footage changes found in building

renovations, additions, and change of use scenarios. Additionally, the Assessor's IAS system will attach a "Land Use Type" to the specific parcel where building/s are situated for general classification. Please note that a Land Use Type assigned to a specific parcel does not necessarily indicate every existing use as there may or may not be multiple buildings on a parcel, or various uses within the same building. However, building square footages located in the WCZ outside of the NMUOZ should be reported in this data snapshot.

The Land Use Type for residential uses is limited to just Condominiums, and there were no square footage changes between 2012 to 2017. Therefore only a breakdown of commercial square footage by use is provided. Below are the seven commercial land use types present in the WCZ zone (outside of the NMUOZ).

Commercial Land Uses:

Wholesale	Multi-Use Commercial
Office Business	Retail Services
Commercial Condos	Governmental
	Manufacturing

Building Square Footage Change in WCZ (Outside the NMUOZ) 2012 & 2017			
Land Use Type	2012	2017	Change
Commercial Uses	486,118	503,779	17,661
Residential Use (Condominiums)	149,530	149,530	0
Total	635,648	653,309	
(City of Portland Assessor's Office Tax Rolls Data, 2012 & 2017)			

Based on the most recent tax rolls from 2017, residential building square footage located within the WCZ target area makes up nearly 23 percent of all building square footage, with commercial uses representing the lion's share at around 77 percent.

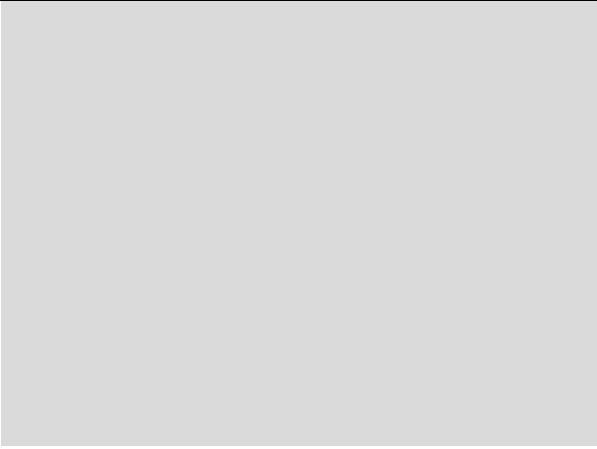
Att. 1. Development Activity Summary

Commercial Building Square Footage by Use Change in WCZ (Outside NMUOZ) 2012 & 2017				
Commercial Uses	2012	2017	SF Change	Change in %
Wholesale	123,726	128,435	4,709	3.8%
Office Business	179,960	192,912	12,952	7.2%
Commercial Condos	14,615	14,615	0	0.0%
Multi-Use Commercial	3,678	3,678	0	0.0%
Retail Services	7,122	7,122	0	0.0%
Governmental	43,856	43,856	0	0.0%
Manufacturing	66,415	66,415	0	0.0%
TOTAL	439,372	457,033	17,661	4.0%
<i>(City of Portland Assessor's Office Tax Rolls Data, 2012 & 2017)</i>				

Wholesale and Office Business were the only uses that saw any square footage increase over the five-year period. For Wholesale, the only change that occurred was on the parcel making up 86 Commercial Street (i.e. Harbor Fish Market) which saw an overall increase of 4,709 SF. The largest change in square footage occurred at 68 Commercial which is attributed to a slight decrease in SF in one of the two buildings, combined with added square footage from the new building where Scales Restaurant is located (formerly the Science Museum was demolished in 2015).

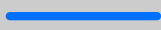
2018 Waterfront Central Zone Ground Floor Marine Use Inventory: Marine Use Area (Outside of the Non-Marine Use Overlay)																							November 2018		
Pier/Property Name	BLDG #	Object ID	Business Occupying Building	Buidling Footprint Area	Buidling Footprint Area-Pier Totals	Active Marine Use Building Area	Active MU, Pier totals	Vacant Building Area Available to Marine Use	Vacant building area, Pier Totals	Buidling Area Available to Marine Use (Active Marine Plus Vacant)Pier Total	Active Non-Marine Use Building Area	Active NonMU, Pier Totals	Percent Building Area Available to Marine Use (active marine use plus vacant divided by building footprint area pier totals)	Parcel ID Number	CBL Number	Property Owner	Land Pier Area	Common Circulation Drive Area	Open Area-net (land pier area minus Com Drive minus Building footprint area-pier total)	Active Marine Use Open Area	Vacant Open Area, Available to Marine Use	Open Area Available to Maine Use (Active Marine plus Vacant)	Active Non-Marine Use Open Area	Percent Open Area Available to Marine Use (Active Marine Use Plus Vacant divided by Open Area)	Notes: Vacancies are likely under reported within the percentage totals. Where casual storage, or no information was available, building area and open area is assumed to be available to marine use.
Deake's Wharf	1	38984		11056		9265		1800			0		100%												
	2	36868		4764		4764		0			0		100%												
	4p	38797		457		457		0			0		100%												
pier total				16277	16277	14486	14486	1800	1800	16286	0	0	100%	1	043 H001001	Gen Mar Con.	57527	5929	35321	35321	0	35321	0	100%	
Sturdivant's Wharf	6	38749		11104	11104	11104	11104	0	0	11104	0	0	100%	2	042 G001001	Sturdivants Wharf LLC	38737	1790	25843	25843	0	25843		100%	
Holyoke Wharf										0									0						
Alfiero	8p	38415	Seafood/Maine Marine	5960	5960	1500	1500	3960	3960	5460	500	500	92%	3	042 F003001	Harbor Fish Market	11518	1269	4289	4289	0	4289		100%	
Hale	9	38657		4109		4109																			
	10	38828		6919		5017		1849											0						
Hale pier total					11028	9179	9179	1849	1849	11028	0	0	100%	4	042 F002001	Gen Mar Con.	34324	4350	18946	18946	0	18946		100%	
Berlin Mills Wharf	12	36299	Portland Yacht Services	3156						0									0						
	12b	38420		708						0									0						
pier total					3864	0	0	3864	3864	3864	0	0	100%	5	042 E001001	Schmader	52034	0	48170	0	46362	46362	1808	96% st	Recent vacancy due to departure of PYS. Pier for sale. NM open area is parking for 400 Comm
Hobson's Pier	15	38554	ISF Trading/Maine Lobster Pound	16293		16293		0			0														
	15b	38608		857						0															
pier total					17150	17150	17150	0	0	17150	0	0	100%	6	042 D002001	Hobson's Pier Inc	67478	10812	39516	39516	0	39516	0	100%	
Becky's Parcel Remnant	16			375	375	0	0	0	0	0	375	375	0%	6b	042 D004001	Becky's	894	0	519	0	0	0	519	0%	
GMRI/Coast Guard (Wright's)	17	37489		3894						0				7	042 C003001										
I	17a	38577		500						0															
pier total					4394	4394	4394	0	0	4394	0	0	100%			GMRI	205990	19658	181938	115938	66000	181938	0	100%	
Portland Fish Pier	18	54072	Bristol Seafood	23298		23298		0																	
	19	38382	MTC	14911		14911		8200																	
	20	38466	Vessel Services	5152		5152		0																	
	21	38074	PFX	39245		39245		0																	
	22	37819	Douty Brothers	7240		7240		0																	
	23	37990	IFS	8338		8338		0																	
bait cooler (new in 2013)	24a	61253	Dropping Springs	1538		1538		0																	
pier total				99722	99722	99722	91522		8200	99722		0	100%	8	multiple Parcels	Fish Pier complex	458356	41466	317168	265111	0	265111	52057	84%	Non-marine open space is located in front parking lot, MTC parking, MTC visitor parking
Merrill's/Cumberland	26p	37870	Waterfront Maine	20247	14306	6615	6615	1253	1253	7868	6438	6438	55%	9	041 A018001	Waterfront Maine	47463	12205	15011	8940	0	8940	6071	60%	

Pier/Property Name	BLDG #	Object ID	Business Occupying Building	Building Footprint Area	Buidling Footprint Area-Pier Totals	Active Marine Use Building Area	Active MU, Pier totals	Vacant Building Area Available to Marine Use	Vacant building area, Pier Totals	Buidling Area Available to Marine Use (Active Marine Plus Vacant)	Active Non-Marine Use Building Area	Active NonMU, Pier Totals	Area Available to Marine Use (active marine use plus vacant divided by building footprint area pier totals)	Parcel ID Number	CBL Number	Property Owner	Land Pier Area	Common Circulation Drive Area	(land pier area minus Com Drive minus Building footprint area-pier total)	Active Marine Use Open Area	Vacant Open Area, Available to Marine Use	Open Area Available to Maine Use (Active Marine plus Vacant)	Active Non-Marine Use Open Area	Area Available to Marine Use (Active Marine Use Plus Vacant divided by Open Area)	Notes
Union Wharf	27p	37716		763						763															
	28p	36649		2850		2850																			
	29p			950						950															
	30	37982		1729		1729																			
	31	37802	Maine Lobster Direct	6963		5763				1200															
	32	38009	Maine Lobster Direct	1702		1702																			
	33	61243	Demoloished																						
	34	38075	Cozy Harbor	4963		4963																			
	35	37453	CBS Lobster	1943		1943																			
	36	38053	Demoloished																						
	36a		Replaced33 and 36	2722																					12 parking spaces, estimated
pier total					24585	21672	21672	0	0	21672	2913	2913	88%	10	031 L035001	Proprietors of Union Wharf	118533	14685	79263	73824	0		5439	93%	
Widgery Wharf,multiple, mobile buildings	41	multiple mobile buildings																				0			
	A			132		132																			
	B			76		76																			
	C			243		243																			
	D			208		208																			
	E			177		177																			
	F			216		216																			
	G			233		233																			
	H			215		215																			
	I			136		136																			
	J			211		211																			
	K			297		297																			
	L			177		177																			
	M			326		326																			
	N			261		261																			
	O			137		137																			
	P			1620		1620																			
	Q			776		776																			
	R			136		136																			
	S			159		159																			
	T			102		102																			
	U			120		120																			35-45 non-marine use parking spaces, some tandem layout. May have marine mixed in.
pier total				5958	5958	5958	5958	0	0	5958	0	0	100%	11	031 K008001	Kelly Family	45061	7318	31785	22019	0	22019	9766	69%	
Chandler's Wharf, multiple mobile buildings	42p	37926		7235						7235				12	031 J002577										
		37794		6389						6389															
		37751		4755						4755															
		36656		6700						6700															
		37891		6338						6338															
		37977		6436						6436															
				1298						1298												0			
pier total				39151	39151	0	0	0	0	0	39151	39151	0%				67748	0	28597	0	0	0	28597	0%	



Pier/Property Name	BLDG #	Object ID	Business Occupying Building	Buidling Footprint Area	Buidling Footprint Area-Pier Totals	Active Marine Use Building Area	Active MU, Pier totals	Vacant Building Area Available to Marine Use	Vacant building area, Pier Totals	Buidling Area Available to Marine Use (Active Marine Plus Vacant)	Active Non-Marine Use Building Area	Active NonMU, Pier Totals	Percent Building Area Available to Marine Use (active marine use plus vacant divided by building footprint area pier totals)	Parcel ID Number	CBL Number	Property Owner	Land Pier Area	Common Circulation Drive Area	Open Area-net (land pier area minus Com Drive minus Building footprint area-pier total)	Active Marine Use Open Area	Vacant Open Area, Available to Marine Use	Open Area Available to Mainie Use (Active Marine plus Vacant)	Active Non-Marine Use Open Area	Percent Open Area Available to Marine Use (Active Marine Use Plus Vacant divided by Open Area)	NOTES
Fishermen's/Port Lobster	43	37349	Portland Lobster	1140							1140														
		167291	Building replaced																						
Portland Lobster Co buildngs are a collection of tents, sheds and storage units with seasonal use		167292	Building replaced																						
	partial		partial, Portland Lobster	893							893														
	43B		Portland Lobster	672							672														
	43C		Portland Lobster	268							268														
	43D		Portland Lobster	342							342														
	43E		Harbor tours/Water taxi	252		252																			
				0																					
pier total				3567	3567	252	252	0	0	252	2175	2175	7%	13	031 J030001		10459	0	6892	345	0	345	6547	5%	
ishermen's parking remnant							0		0	0		0		14	031 J032001		2375	0	2375	0	0	0	0	0%	
Long Wharf/Dimillo's	44	37304		917		917																0			
																						0			
Multiple	45	37695		4934							4934														
	45a	54080		1098		1098																			
personal prop in assessment	46			13162		0																0			
pier total				20111	20111	2015	2015	0	0	2015	13162	13162	10%	15	030 H001001		47149		40200	12050	0	12050	28150	30%	Marina is considered non-comerical marine
Portland Pier						0				0												0			
Port Pier, J's Oyster	49p	37269		845	845	0	0	0	0	0	845	845	0%	16	030 H018001		2576	0	1731	0	0	0	1731	0%	
11 Port Pier, Law parking														17	030 H013001		1881	0	1881	0	0	0	1881	0%	
12 Port Pier, Law Offices	53	36856		1969			0		0	0							2439		1594			0			
Law offices	54p	33641	Formerly Lilley law offices	1637	3606	0	0	0	0	0	3606	3606	0%	18	030 B002001		11397	1117	6674	0	0	0	6674	0%	
ort Pier, Dimillos yacht sales	50	37386		1731	1731	1731	1731	0	0	1731	0	0	100%	19	030 H008001		4972	0	3241	1620	0	1620	1620	50%	Parking use % unclear
40 Port Pier Com Condos	52	37299								0					030 B001020							0			
50 Port Pier Res Condos	52			12564	12564	0	0	0	0	0	12564	12564	0%	20	030 B007		14555	0	1991	1405	0	1405	586	71%	
60 Portland Pier	51	37574	Lukes	4121		1902																0			
Bait Shack	51b	52 in GIS		1340		1208		0			132											0			Area calcs based on pending development plans
60 Port Pier total					5461	3110	3110	0	0	3110	2219	2219	57%	21	030 B004001		19947	5055	9431	5797	0	5797	3634	61%	spaces, 1 HC parking space, and 2000 sf exterior
Custom House Wharf																									
	55	53945	Harbor Fish	8473		8473										McGowen						0			
	56	53944	Seabags	4941		0					4941											0			
	56a	54081	various tenants	3582		3582																0			
	57	37384	Coastal Bait	8331		8331																0			
	58	53946	Coastal Bait	7552		7552																0			
	59		Lobster pound	4775		4775																			Extent of vacancies uncertain. Not apparent from land/pier total
	60	37251	Port Hole	2417		0					2417											0			
	61p	37170	Boones, Port Hole	7737		0					7737											0			
pier total				47808	47808	32713	32713		0	32713	15095	15095	68%	22	030 A001001		102161	10845	43508	25743		25743	17765	59%	assigned as non marine open space. Subject to
Maine Wharf																									
Goodrich	63	37092	Scales Bangs, Upstream, Nanuq	9501		0																0			
	64	37175		12297		12297					9501											0			Assumed 10 Non Marine parking spaces - variable
pier total					21798	12297	12297		0	12297		9501	56%	23			45023	8523	14702	11458		11458	3244	78%	
Flatbread/RiRa	65p	37020		4542	4542	0	0	0	0	0	4542	4542	0%	24	030 D001001		7303	272	2489	0	0	0	2489	0%	
TOTALS					381627		235698		20926	256624		113086	67%				1477900	145294	963075	668165	112362	780527	178578	81%	Discrepancies between totals due to rounding errors and subtracting common area from buildings causes inconsistent numbers between Land Pier and Buiding Area Available to Marine Use basis

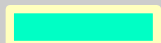
Legend



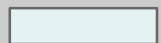
Non-Marine Use Overlay



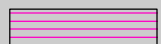
WCZ building



WCZ Parcel



Common Drive



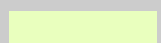
Active Non-marine Use
Open Area



Active Marine Use
in dominantly non-
marine property



Vacant Open Area



Pier area lost to
demolition/damage

#100

Building Number

#100

Parcel Number

Waterfront Central Zone Marine Use Inventory: Key Map



600 300 0 600 Feet

Map produced by the City of Portland Department of Economic Development from City of Portland 2018 pictometry, GIS parcel data, field observations, pier management interviews, and on-site interviews. December 2018

