Industrial Real Estate & Utility Power: Kent Valley Retrofits, Eastside Labs & Cleanroom Continuity

Pillar: Structural Factors | **Basis:** 2025–2026 Lease & Substation Records | **Primary Source:** Regional Utilities / CRE Filings | **As Of:** As of Nov 16, 2026

Washington's space cluster divides between high-bay industrial retrofits in Kent/Bothell/Marysville (Cowboy Space 291,035 sq ft; Stoke 168,000 sq ft; Portal 50,000 sq ft) and Class-A engineering offices in Bellevue/Redmond (Agile ~5,740 sq ft; K2 Space)—with substation power continuity and cleanroom backup critical in both.

Documented Policy & Site-Selection Record

• Two-Tier Real Estate Market: Large-bay industrial shells in Kent (former logistics/distribution centers) enable 150K–300K sq ft rocket and spacecraft retrofits, while Bellevue/Redmond absorb 5K–50K sq ft engineering and R&D hubs.

• Snohomish & Bothell Growth: Portal Space Systems (50,000 sq ft in Bothell) and Gravitics (Cascade Industrial Center in Marysville) show northern Puget Sound absorbing manufacturing growth outside the Green River Valley.

• Power & Cleanroom Continuity: Satellite cleanrooms, TVAC chambers, and additive manufacturing cells require uninterrupted 3-phase power and backup generation (#2134).

• Cost Tradeoff: Puget Sound industrial rents and labor costs exceed Alabama or inland Texas, making engineering productivity and existing shell availability the decisive offsets.

Puget Sound Space Submarkets Compared

Submarket	Typical Use	Documented Examples
Kent / Tukwila Valley	100K–300K sq ft manufacturing & integration	Blue Origin, Stoke (168k), Cowboy (291k), BlackSky
Redmond / Bellevue	Constellation R&D, flight SW, RF & propulsion	SpaceX, Amazon Leo, K2 Space, Agile (5.7k), Starcloud
Bothell / Marysville	Spacecraft & orbital module manufacturing	Portal Space (50k), ARKA/CACI, Gravitics
Moses Lake (MWH)	Static hot-fire & flight test	Stoke Space test operations

Founder, Staffer & Site-Selector Takeaways

• Founder Takeaway: Verify substation capacity, flood elevation, and backup power timelines (#2134) before signing Valley industrial retrofits.

• Staffer Takeaway: Industrial land supply outside the 100-year floodplain (Marysville, Bothell, Frederickson/Pierce) is a key lever for retaining Series B+ factories.

Cross-Cluster Links & Primary Sources

• **WA Space Cluster Hub (#1382):** https://bcesg.org/washington-space-cluster-census/

• **Valley Utility Substation & Power Continuity:** https://bcesg.org/wa-space-valley-utility-substation-power-continuity/

• **Kent WA Space Cluster Profile:** https://bcesg.org/kent-wa-space-cluster-profile/

• **Bellevue WA Space Cluster Profile:** https://bcesg.org/bellevue-wa-space-cluster-profile/

• **Bothell WA Space Cluster Profile:** https://bcesg.org/bothell-wa-space-cluster-profile/

• **Cowboy Space WA Profile:** https://bcesg.org/cowboy-space-washington-space-cluster-profile/

• **Washington State Department of Commerce:** https://www.commerce.wa.gov/

• **GeekWire Aerospace Coverage:** https://www.geekwire.com/

Provenance Note: Synthesizes documented 2025–2026 facility leases and Batch 7 utility substation continuity records (#2134).