

Attachment 1



CANNABIS PERMITTING UPDATE

3RD QUARTER

SEPTEMBER 12, 2017

The goal of this report is to track both the number and concentration of new medical cannabis businesses in Santa Rosa, and the impacts to other industries that occupy similar zoning. As the City of Santa Rosa implements new medical cannabis regulations, and permits new businesses within the city limits, understanding these impacts will inform policy development in the support of a diverse economy, and the retention of local businesses.

CANNABIS PERMITTING UPDATE

3RD QUARTER

SEPTEMBER 12, 2017

Under the City of Santa Rosa's interim cannabis policy, medical cannabis operators may locate in Light Industrial (IL), General Industrial (IG) and Business Park (BP) Zoning Districts. There are over 120 business types located within Santa Rosa's Industrial and Business Park zones, including sectors such as contractors, manufacturers, industrial rental services and supplies, as well as professional services such as legal and health care.

Santa Rosa has an approximate total of 10.3 million square feet of industrial space, with a vacancy rate of 5% (this has not changed substantially since the March 2017 report). At this time, the total square footage of **approved** medical cannabis space accounts for

3.0% of the total space available. This 3.0% represents 18 cannabis business (312,918 square feet) that have received their land use permit, two of which are currently in operation.

In addition to these 18 approved businesses, there are 33 additional cannabis businesses that have either gone through the pre-application process or have submitted an application for review. These 33 as yet unpermitted businesses in review represent an additional **4.8%** (or 491,044 square feet) of Santa Rosa's total available industrial space.

SUMMARY OF CHARTS

PAGE 2

CHART 1: Top 20 Business Types in Zoning Allowed for Commercial Medical Cannabis Businesses.

CHART 2: Vacancy Rates in Industrial Zoning

PAGE 3

CHART 3: Medical Cannabis Building Sq. Ft. by Type (Pending/Approved)

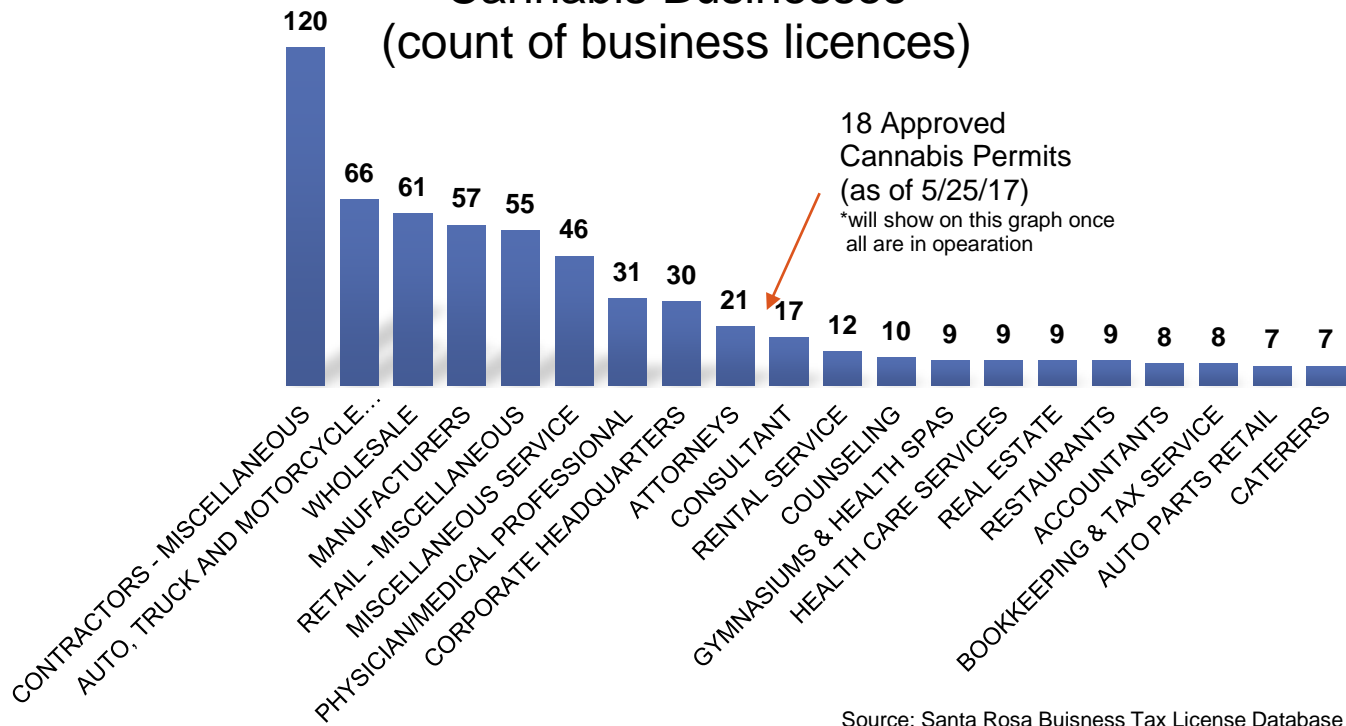
CHART 4: Medical Cannabis Applications by Type (Pending/Approved)

PAGE 4 & 5

CHART 5: Medical Cannabis Applications – Complete List

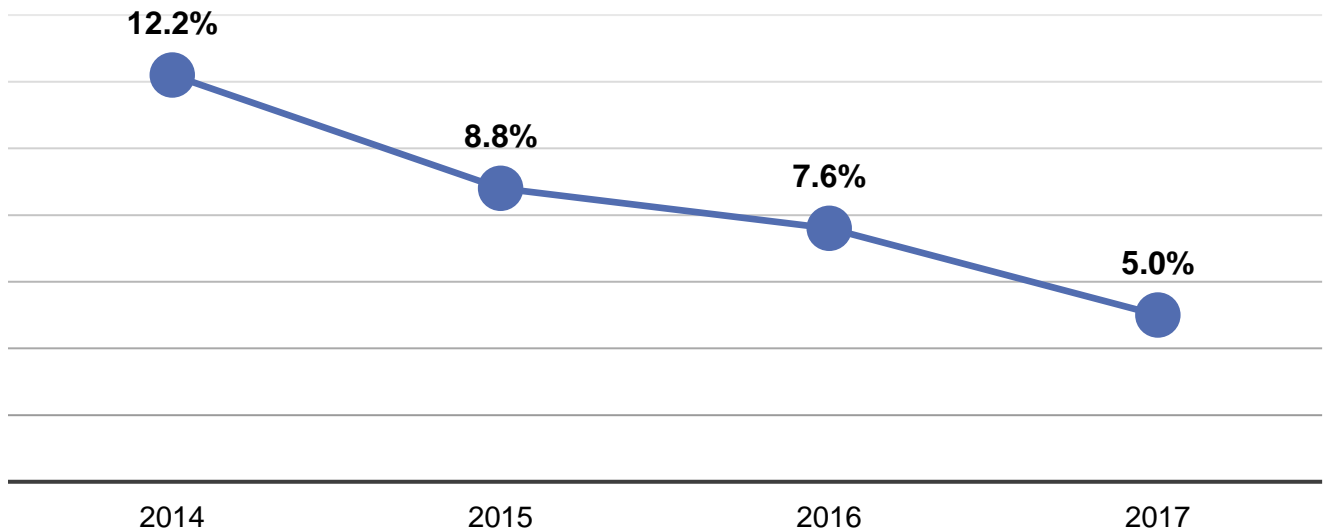


**Chart 1:
Top 20 Business Types
in Zoning Allowed for Commerical Medical
Cannabis Businesses
(count of business licences)**



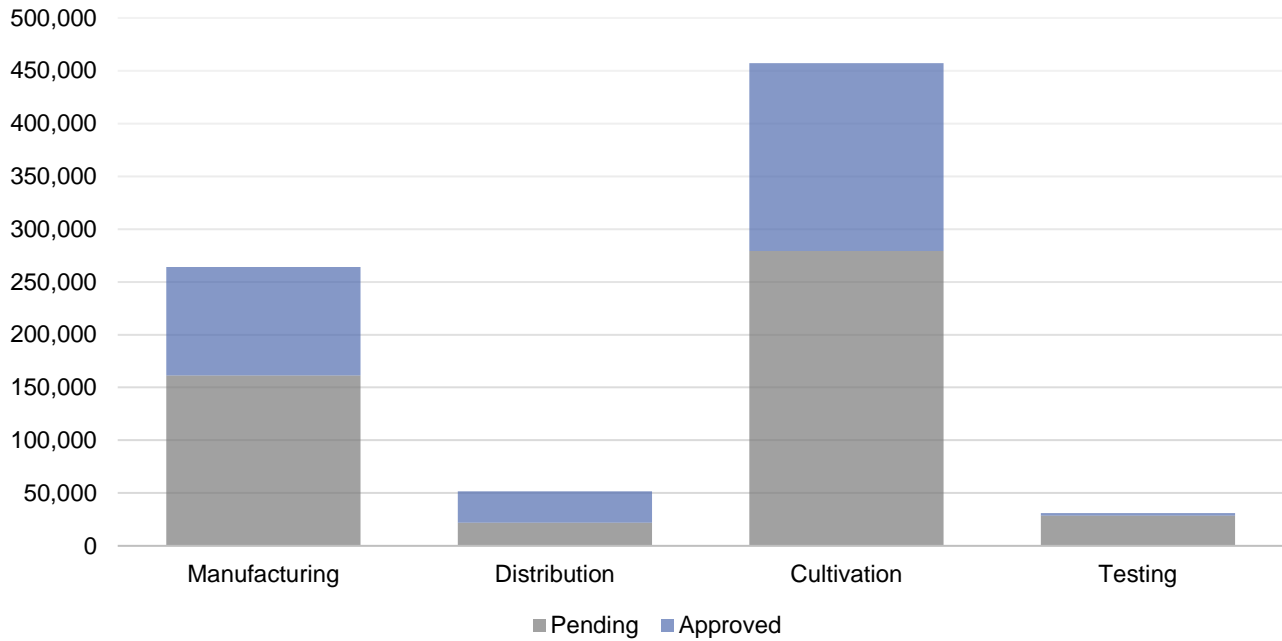
Source: Santa Rosa Business Tax License Database

**Chart 2:
Vacancy Rates in Industrial Zoning**

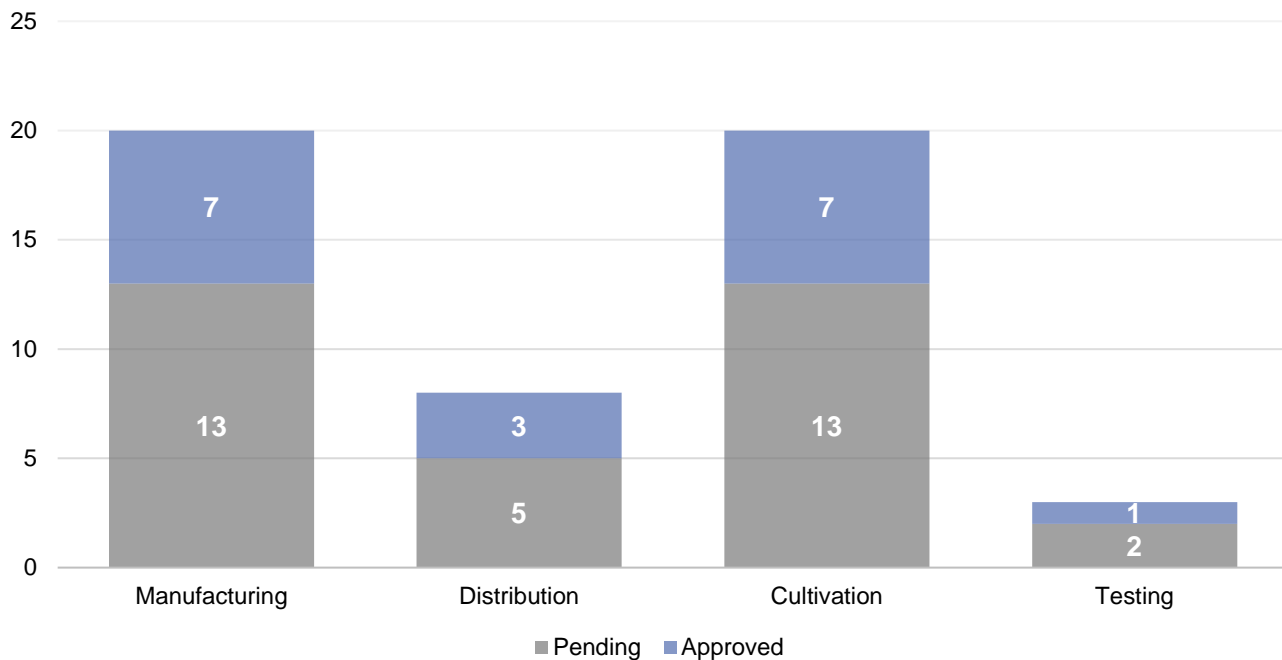


Source: Keegan & Coppin Company, Inc 1st Qtr Industrial Vaccancy Rates

CHART 3: MEDICAL CANNABIS BUILDING SQ. FT BY TYPE



MEDICAL CANNABIS APPLICATIONS BY TYPE



City of Santa Rosa

MEDICAL CANNABIS APPLICATIONS

		Street Address	Zoning	Primary Land Use	Building Sq. Ft.	Land Use Permit	Building Permit	Operational
1	3262	Airway Dr	IL	Cultivation	8,250	pending		
2	3440	Airway Dr	IL	Distribution	2,000	pending		
	3440	Airway Dr	IL	Manufacturing	10,000	pending		
3	2133	Bluebell Dr	IL	Manufacturing	1,520	pending		
	2133	Bluebell Dr	IL	Distribution	1,363	pending		
4	2150	Bluebell Dr	IL	Cultivation	31,870	Approved		
5	1215	Briggs Ave	IL-SA	Manufacturing	500	pending		
	1215	Briggs Ave	IL-SA	Cultivation	5,100	pending		
6	1236	Briggs Ave	IL-SA	Cultivation	4,723	pending		
	1236	Briggs Ave	IL-SA	Manufacturing	2,852	pending		
7	2330	Circadian Way	BP	Manufacturing	32,847	Approved	Finald	Yes
8	2330	Circadian Way	BP	Testing	2,448	Approved	Finald	Yes
9	2351	Circadian Way	BP	Manufacturing	14,880	Approved	Issued	
10	3187	Coffey Ln	IL	Manufacturing	1,800	pending		
	3187	Coffey Ln	IL	Cultivation	9,554	pending		
11	2967	Coors Ct	IL	Cultivation	6,000	Approved		
12	2967	Coors Ct	IL	Manufacturing	4,000	pending		
13	975	Corporate Center Pkwy	BP	Manufacturing	5,200	Approved	Finald	Yes
14	975	Corporate Center Pkwy	BP	Distribution	5,548	pending		
15	2835	Duke Ct	IL	Cultivation	24,510	Approved	pending	
16	2960	Dutton Ave	IL	Cultivation	107,040	pending		
	2970	Dutton Ave	IL	Manufacturing	87,492	pending		
	2970	Dutton Ave	IL	Testing	28,000	pending		
17	1805	Empire Industrial Ct	PD (IL)	Cultivation	9,722	pending		
18	1809	Empire Industrial Ct	PD (IL)	Cultivation	6,814	pending		
19	2739	Giffen Ave	IL	Cultivation	67,630	Approved	pending	
	2753	Giffen Ave	IL	Manufacturing	5,425	Approved	pending	
	2765	Giffen Ave	IL	Distribution	15,580	Approved	pending	
20	3310	Industrial Dr	IL	Cultivation	12,110	Approved	Issued	
21	3320	Industrial Dr	IL	Cultivation	20,000	pending		
22	3401	Industrial Dr	IL	Distribution	4,500	Approved		
23	3499	Industrial Dr	IL	Cultivation	9,036	pending		
24	3192	Juniper Ave	IG	Manufacturing	4,964	pending		
25	60	Maxwell Ct	TV-R-SA-LIL	Cultivation	10,972	Approved		
26	835	Piner Rd	IL	Cultivation	2,580	pending		
	835	Piner Rd	IL	Manufacturing	2,000	pending		
	835	Piner Rd	IL	Testing	585	pending		
	835	Piner Rd	IL	Distribution	1,050	pending		

27	925	Piner Rd	IL	Manufacturing	4,193	pending		
28	970	Piner Rd	IL	Cultivation	2,300	pending		
	970	Piner Rd	IL	Manufacturing	2,058	pending		
29	1626	Piner Rd	IL	Manufacturing	4,130	Approved		
30	965	Piner Place	IL	Manufacturing	7,816	Approved	pending	
31	947	Piner Place	IL	Distribution	9,700	Approved	pending	
32	2875	Sebastopol Rd	IL	Cultivation	25,000	Approved		
33	2049	Steele Ln, West	IL	Manufacturing	32,300	Approved		
34	368	Yolanda Ave	IL	Cultivation	8,000	pending		
	368	Yolanda Ave	IL	Manufacturing	16,000	pending		
35	800	Yolanda Ave	IL	Cultivation	86,000	pending		
	800	Yolanda Ave	IL	Manufacturing	24,000	pending		
	800	Yolanda Ave	IL	Distribution	12,000	pending		
				Cultivation	457,211	Approved	178,092	
				Manufacturing	263,977	Approved	102,598	
				Testing	31,033	Approved	2448	
				Distribution	51,741	Approved	29,780	
				TOTAL	803,962	Approved	312,918	
		4th Qtr 2015 (Sq. Ft.)						
		Total Industrial Land Base - % of base			10,312,903	7.80%		3.03%