

Commercial and Industrial Land Analysis

Martin County 2023

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Prepared by Metro Forecasting Models

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Introduction

The purpose of this land use analysis is to determine the developed and vacant acres of commercial and industrial lands in Martin County. In order to successfully serve the needs of Martin County’s future residents and visitors, the County must “provide for adequate and appropriate sites” for commercial and industrial land uses (Goal 4.10 and Goal 4.11 of the Martin County Comprehensive Growth Management Plan CGMP).

This report updates the County’s 2016 report with new information regarding commercial and industrial future land use designations to achieve those goals. The prior report focused only on commercial and industrial lands located in the unincorporated portion of Martin County. For this report, the incorporated areas are included in the analysis to provide a wholistic overview of where the developed and vacant commercial/industrial lands exist.

This report is made up of three parts:

- Part I: Amount of acreage developed as commercial or industrial uses by jurisdiction.
- Part II: Inventory of vacant commercial and industrial parcels.
- Part III: An analysis to help guide the County’s land use balance of commercial and industrial land necessary to accommodate the projected population growth for the next 15 years.

Part I – Developed Commercial and Industrial Acreage

The analysis of developed commercial and industrial lands includes parcels with both occupied and vacant buildings on them. Vacant non-residential structures can be leased at any time and are therefore included as existing developed commercial. Quantifying the occupied versus vacant structures is beyond the scope of this report.

To assist the County in its stated goals, an inventory of acreage that is currently developed as commercial or industrial was created from the Martin County Property Appraiser (MCPA) parcel data. The MCPA parcel data was loaded into GIS and joined to the parcel, Urban Services Districts, zoning, and future land use shapefiles available by jurisdiction. The parcels were then sorted by the Florida Department of Revenue (DOR) codes of property uses.

Summary of Commercial Land Use Codes and Descriptions

1100	Store - 1 Story	2100	Restaurant/Cafeteria
1200	Mixed use/store/office	2200	Drive-in Restaurant
1204	Mixed Use Condo*	2300	Financial institution
1300	Department Store	2500	Repair service shop
1400	Supermarket	2600	Service Station
1500	Regional Shopping Center	2700	Auto Sales/Repair
1600	Community Shopping Center	3200	Enclosed Theatre/Auditorium
1700	Office Building - 1 Story	3300	Nightclub/Bar/ Lounge
1800	Off Building - Non-Prof. Multi Story	3400	Bowling Alley/Skating Rink
1900	Prof. Services/Medical office	3900	Hotel/Motel
2000	Marina/Air/Bus Terminal		

Prior to the developed acres being determined, the parcel data was analyzed spatially and through arial photos. Ultimately, one of the DOR land use codes was found to need adjustments, the 1204 Mixed Use Condo* DOR code. A common problem that can occur in both commercial and industrial GIS analysis of condominiums is “stacking.” Stacking occurs as a result of the entire parcel acreage being assigned to each condominium unit, resulting in a gross overstating of commercial or industrial land use.

For example, a ten-unit condominium on a one-acre parcel would show ten acres of development when the acres of the individual parcels are summed. In these cases, the parent parcel acreage was determined and divided by the number of units and the fractional parcel acres were assigned to each parcel. This important step reduces or eliminates the potential for double counting development acres where multiple “units” occupy a single parcel.

The query of Commercially developed land area in Martin County resulted in a total of 1,964 acres. Unincorporated Martin County, including the CRAs has approximately 1,115 acres of Commercially developed land area.

The table below shows the distribution of developed commercial land by location.

Table 1 - Developed Commercial Land by Location

Area/Location	Developed Acres	% Commercial
City Of Stuart	752	38.3%
Golden Gate CRA	21	1.1%
Hobe Sound CRA	91	4.6%
Indiantown	34	1.7%
Jensen Beach CRA	10	0.5%
Ocean Breeze	12	0.6%
Old Palm City CRA	37	1.9%
Port Salerno CRA	13	0.7%
Rio CRA	17	0.8%
Sewall's Point	12	0.6%
Unincorporated	966	49.2%
Total	1,964	100.0%

Stuart has 38% of all commercial space in the county, yet its population is only 10% of the county. The above table shows that many Martin County residents work, shop and do business in the City of Stuart. As areas of unincorporated Martin County outside of Stuart develop residentially, they will create a market that is able to support commercial uses. This will shift some of the demand for commercial land closer to where new housing projects are developed.

Indiantown, which has approximately 4% of the population, has 2% of the commercial space. Now that Indiantown is incorporated, they have updated their zoning and future land uses to promote and favor mixed use development. As the population of Indiantown grows, their demand and need for commercial lands will increase.

Summary of Industrial Land Use Codes and Descriptions:

- 4100 Light Equipment Mfg
- 4200 Heavy Equipment Mfg
- 4300 Lumber Yard/ Sawmill
- 4700 Mineral Process/Cement/Phosp
- 4800 Warehouse Distribution Terminal
- 4804 Warehouse Condo*
- 4900 Open Storage Junk Yard
- 6300 Grazing Land Soil Capacity Class 3
- 8600 County Other Than Prev. Covered

Similar to the developed commercial acreage analysis, there was a stacking issue with industrial condominiums, DOR 4804*. This DOR code was also returning acreage for the entire parcel for each condominium unit. The parent parcel acreage was divided by the number of condominium units and then assigned to each unit so the acreage was not over-reported.

The query resulted in a total of 1,491 acres of developed Industrial land in Martin County. Unincorporated Martin County, including the CRAs, has approximately 1,012 acres of developed Industrial land area.

The table below shows the distribution of developed industrial land by location.

Table 2 - Developed Industrial Land by Location

Area/Location	Developed Acres	% Industrial
City Of Stuart	164	11.0%
Golden Gate CRA	21	1.4%
Hobe Sound CRA	21	1.4%
Indiantown	315	21.1%
Old Palm City CRA	27	1.8%
Port Salerno CRA	16	1.1%
Rio CRA	20	1.3%
Unincorporated	907	60.8%
Total	1491	100.0%

Stuart has 11% of all industrial space in the county whereas Indiantown has approximately 21% of the industrial space in Martin County.

Part II – Vacant Commercial and Industrial Land Analysis

Encouraging commercial development is a crucial part of the County’s Comprehensive Growth Management Plan. The following criteria are used to determine potential sites: land use and zoning, sufficient buildable area, and necessary infrastructure in place or available.

To accomplish this, the following site parameters were established to inventory the vacant parcels:

- Sites with a Future Land Use Designation of Commercial or Industrial
- Sites that are served or adjacent to water and sewer services
- Sites that are not located on road segments that have concurrency constraints

Recognizing that certain commercial land use allows for commercial, residential, or a mixture of commercial and residential, some of the vacant commercial acreage is reduced to simulate a portion of a parcel to be developed with residential units. Appendix A provides the specific methodology used to estimate the portion of commercial or mixed-use land that may be developed with residential uses. For the analysis, these lands are called “Potential residential acres.” This approach was taken so as not to overestimate the amount of vacant, usable commercial land in Martin County.

Methodology

In unincorporated Martin County parcels were inventoried based on their future land use. The inventory includes only those parcels in Martin County that have an Industrial, Commercial or Mixed-Use Future Land Use Designation. All parcels are within the Urban Service Districts.

The following future land uses were queried:

- General Commercial
- Limited Commercial
- Commercial Waterfront
- Commercial/Office/Residential
- Industrial

Next, the sites were categorized according to the zoning district designation on each site.

- Category A - Compatible with the underlying Future Land Use Designation.
- Category C - Require a rezoning prior to new development in most cases.

Category A and Category C inventories were verified using the 2022 aerial.

Two additional future land uses were also analyzed for their potential to accommodate future commercial and industrial land uses: AgTEC and Mixed-Use Village (Newfield). The allowable uses for the future land use of AgTEC were analyzed for this study. The result was 200 acres were allocated for future commercial development and 700 acres were for future industrial development.

The Mixed-Use Village future land use associated with the Newfield project was also analyzed. The analysis results were 30 acres allocated for future commercial development and 270 acres allocated for future industrial development.

The allocations of commercial and industrial uses assumed on the AgTEC and Mixed-Use Village future land uses are estimates for the purposes of this study and may not reflect the actual acreages developed in these two projects. These assumptions were made to account for these two projects and their ability to accommodate future non-residential development. It is not reasonable to assign exact non-residential acres to these two projects until they are platted for future development. Platting aside, land allocations for rights-of-way, buffers and water management that will serve these non-residential uses are yet to be determined.

For the incorporated areas including Indiantown and Stuart, future land uses that allowed industrial and commercial were included. The other incorporated areas did not have significant vacant lands for future non-residential development. With the above criteria in mind, the property appraiser GIS parcel data was used to create layers for additional spatial analysis of the vacant lands in Indiantown and Stuart.

Summary of Vacant Commercial Land

Table 3 provides the Gross Acres as measured by GIS and then provides the Upland Acres to account for environmental limitations on future development. The Upland Acres were calculated based on reducing the Gross Acres by the acreage shown as potential wetlands by the National Wetlands Inventory Database. For the Potential Residential Acres, please see the Methodology in Appendix A. To better understand vacant commercial land in the CRAs, those parcels were analyzed separately from the rest of unincorporated Martin County. The CRA parcels and acres are distinct and not included in the vacant unincorporated acres.

Table 3 - Martin County Vacant Commercial Land

Area/Location	Gross Acres	Upland Acres	Potential Residential Acres	Commercial Use Acres
Unincorporated Martin County*	536	504	43	462
Unincorporated Martin County CRA*	179	176	88	88
Indiantown	409	409	139	270
Stuart	139	135	0	135
Total	1,263	1,224	270	954

*The unincorporated lands are Category A Zoning.

The unincorporated areas of Martin County comprise 57% of the total vacant commercial acreage (Category A zoning and the CRA lands). Stuart and Indiantown do not have Category A Zoning.

Table 4 provides the Category C zoning in unincorporated Martin County. The parcels with Category C zoning were assumed to be developed as commercial only and no adjustment for residential development was included.

Table 4 - Martin County Vacant Commercial Land (Category C Zoning)

Area/Location	Gross Acres	Upland Acres	Potential Residential Acres	Commercial Use Acres
Unincorporated Martin County	109	106	0	106
Total	109	106	0	106

Next, the vacant parcels were analyzed based on their individual parcel acreage. Recognizing that commercial development comes in many shapes and sizes, special analysis was conducted to determine the number of parcels that are greater than 5 acres in size and can accommodate larger and more complex projects.

Table 5 shows the number of parcels, by location, greater than 5 acres. Note the calculated acres are gross acres as larger parcels are better able to be designed and developed around environmentally sensitive lands.

Table 5 - Martin County Vacant Commercial Parcels >5 Acres

Area/Location	Parcels	Gross Acres
Unincorporated Martin County	24	475
Unincorporated Martin County CRA	6	48
Indiantown	15	343
Stuart	8	95
Total	53	960

Summary of Vacant Industrial Land

Martin County's policy prioritizes clean industrial uses that provide jobs and are vital to the County's economic health. Industrial lands can provide everything from space for the construction trades to large-scale warehouses to research labs. The technology of manufacturing has evolved to be cleaner, quieter, and more discreet. Industrial land is one of the most important assets in Martin County.

Table 6 summarizes the vacant industrial lands, both gross acres and upland acres, in Martin County by location.

Table 6 - Martin County Vacant Industrial Land

Area/Location	Gross Acres	Upland Acres
Unincorporated Martin County	1,605	1,542
Unincorporated Martin County CRA	5	5
Indiantown	1,976	1,623
Stuart	15	13
Total	3,600	3,182

The acreage of vacant industrial land is more than twice the acreage of industrial land already developed. As with the commercial vacant land analysis, parcels greater than 5 acres were analyzed separately. Table 7 shows the number of large parcels available for future industrial development.

Table 7 - Martin County Vacant Industrial Parcels >5 Acres

Area/Location	Parcels	Gross Acres
Unincorporated Martin County	28	1,511
Unincorporated Martin County CRA	0	0
Indiantown	19	1,803
Stuart	1	9
Total	48	3,323

Part III –Vacant Land Inventory Analysis

This Commercial and Industrial Land Analysis is an update of a study last conducted in 2016. There have been significant changes since 2016 including:

- On a national level, e-commerce is evolving and has impacted the way business is done and how consumers shop. The 2020 Covid pandemic accelerated the growth and adoption of e-commerce.
- The Village of Indiantown incorporated.
- Mixed-Use Overlays in the Community Redevelopment Areas have been replaced with new future land use designations.
- Plan Policy no longer restricts commercial and industrial land use amendments to that needed for projected population for the next 15 years. That change is consistent with Florida Statutes Section 163.3177(6)(a)4 which states: “The amount of land designated for future land uses should allow the operation of real estate markets to provide adequate choices for permanent and seasonal residents and business and may not be limited solely by the projected population.”
- Senate Bill 102 was adopted and is known as the “Live Local Act.” The bill became Chapter 2023-17 Laws of Florida and encourages affordable housing in areas zoned for commercial, industrial, and mixed-use development.

The 2023 report updates the inventory data for unincorporated Martin County and now includes the incorporated areas. It focuses on the entire County to provide an overview of where commercial and industrial development has occurred and where vacant commercial and industrial land is located.

The 2023 inventory shows 1,155 acres of developed commercial land in unincorporated Martin County compared to the 2016 report that showed 1,321 acres of developed commercial land in just the unincorporated areas. The 2023 inventory also shows 1,012 acres of developed industrial land in unincorporated Martin County compared to the 2016 report that showed 4,815 developed acres.

Metro Forecasting Models reviewed the 2016 analysis and found some developed parcels in the unincorporated areas, particularly non-residential condominium parcels/units, overstated the acres at the parcel/unit level. For example, an industrial condominium site with 10 units occupies a total of 10 acres. However, parcel data associated with each unit in the example condominium also report 10 acres.

When the thousands of parcels had their acreage summed, a 10-unit condominium was presented as 100 acres (10 units each showing they occupy 10 acres) of developed industrial land. The 2023 developed commercial and industrial land inventory has addressed the issue and removed the erroneously reported acres.

Though Martin County Plan Policy no longer limits commercial and industrial amendments to the projected population, Tables 8 and 9 in this report use the population-based methodology for projecting need as was used in the 2016 report. Using the population-based methodology, this report shows 124 acres of additional commercial land and 108 acres of additional industrial land will be needed between 2022 and 2037 in Martin County. Based on the 15-year time horizon, the 124 acres of commercial land necessary to accommodate population growth equates to an annual absorption of approximately 8.3 acres (124 acres/15 years) of commercial development every year for 15 years. Similarly, the projection for 108 acres of industrial land needed to accommodate growth results in approximately 7.2 acres (108 acres/15 years) of additional industrial development every year for 15 years.

Table 8 - Future Commercial Acreage

Analysis Steps		Data Source
1. 2022 Permanent Population	159,053	BEBR 2022 Bulletin 192
2. 2037 Permanent Population	176,100	BEBR 2022 Bulletin 192
3. Ratio of growth	1.1072	Row 2 divided by Row 1
4. Developed Commercial Acreage (Unincorp MC only)	1,155	GIS parcel analysis
5. Acreage needed in 2037	1,279	Row 5 = Row 4 x Row 3
6. Additional acreage required for 15 year population increase	124	Row 6 = Row 5 - Row 4
7. Total commercial vacant acreage on MC FLUM	549	
8. (Deficit)/Surplus	425	Row 8 = Row 7 - Row 6

Table 9 - Future Industrial Acreage

Analysis Steps		Data Source
1. 2022 Permanent Population	159,053	BEBR 2022 Bulletin 192
2. 2037 Permanent Population	176,100	BEBR 2022 Bulletin 192
3. Ratio of growth	1.1072	Row 2 divided by Row 1
4. Developed Industrial Acreage (Unincorp MC only)	1,012	GIS parcel analysis
5. Acreage needed in 2037	1,120	Row 5 = Row 4 x Row 3
6. Additional acreage required for 15 year population increase	108	Row 6 = Row 5 - Row 4
7. Total industrial vacant acreage on MC FLUM	1,546	
8. (Deficit)/Surplus	1,438	Row 8 = Row 7 - Row 6

Recognizing there are other ways to project demand for vacant commercial and industrial land besides population growth, the parcel data was further analyzed. The database of developed commercial and industrial parcel acres created for Part I of this report was queried to sum the acres of new development in unincorporated Martin County from 2011 through 2021.

Approximately 64 acres of commercial development has occurred in all of Martin County since 2011 or 6.4 acres per year on average (64 acres/10 years). Projecting the average commercial absorption rate 15 years into the future would mean that 96 acres of additional vacant commercial land is needed versus the 124 acres that were based on population projections.

The industrial development database query indicates approximately 90 acres of vacant industrial development has taken place in Martin County since 2011 or 9 acres per year on average (90 acres/10 years). Projecting the average industrial absorption rate 15 years into the future would mean that 135 acres of additional vacant industrial land is needed versus the 108 acres that were based on population growth.

Regardless of forecasting methodology, demand for certain commercial uses (e.g, large employment centers) and industrial uses (e.g. warehouses and manufacturing facilities) is based on economic factors and not tied to population growth or historic development. Locations that are near population centers but lacking in sufficient supply of developable commercial or industrial land may have justification to add to the existing vacant land inventory based on their development characteristics.

For example, a proposed land use change that would employ a significant number of people would be better located closer to the workforce than having the workers commute outside of the urban area and add to existing congestion. Similarly, land uses that tend to have a low number of employees or are otherwise not compatible with nearby residences may be better suited to one of the existing vacant parcels.

Both industrial and commercial developed land share similarities. Commercial developments often have space dedicated to storing products or materials which are normally associated with industrial development. Some industrial developments have office space components which mimic traditional commercial development.

Conclusion

Based on either past growth/absorption or population projections the inventory shows sufficient commercial and industrial land within the unincorporated areas for the present and the near future. However, both projection methods appear much less useful than they have been in the past. Changes in the marketplace like e-commerce could greatly reduce the need for both developed and undeveloped commercial land while increasing the demand for logistics centers on industrial land.

In contrast to the last statement, legislative changes like the “Live Local Act” could consume both developed and undeveloped commercial and industrial land with affordable housing and reduce the land available for jobs and commerce. Even before the “Live Local Act” was adopted,

Martin County landowners have sought Future Land Use Map amendments to change from commercial and industrial future land use designations to residential future land use designations.

In addition to unpredictable changes to the inventory, proximity to population centers may become a more important factor when considering adding to or subtracting from the inventory of commercial and industrial land. Tracking development demand, population growth, and commercial/industrial demand are crucial for making informed decisions in the future. Staff recommends updating the data in this report for both incorporated and unincorporated areas at least every two years.

Appendix A

Methodology That Apportions Some Commercial Land for Residential Uses

Mixed Use and CRA Parcels in the Unincorporated Areas

A reasonable assumption is that 1/2 of the parcel will be developed as residential uses, 1/2 will be developed as office or retail uses.

Mixed Use Parcels in the Incorporated Areas

A reasonable assumption is that 1/3 of the parcel will be for residential use, 1/3 will be office/service type use and 1/3 will be retail goods. In Indiantown, the allocation was 2/3 commercial and 1/3 residential for mixed-use land uses.

Parcels With Zoning That Allows 2 Uses (COR)

In unincorporated Martin County where zoning allows for a mixture of two land uses on a parcel, ½ of the acreage was allocated for future commercial development and ½ was allocated for future residential development.

Appendix B

*College of Liberal Arts and Sciences
Bureau of Economic and Business Research*

Florida Population Studies



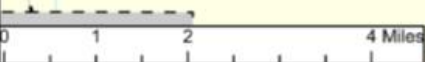
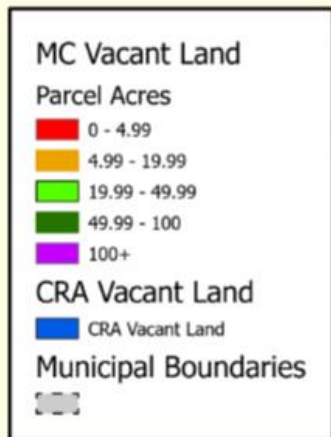
Volume 55, Bulletin 192
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Projections of Florida Population by County, 2025–2050, with Estimates for 2021

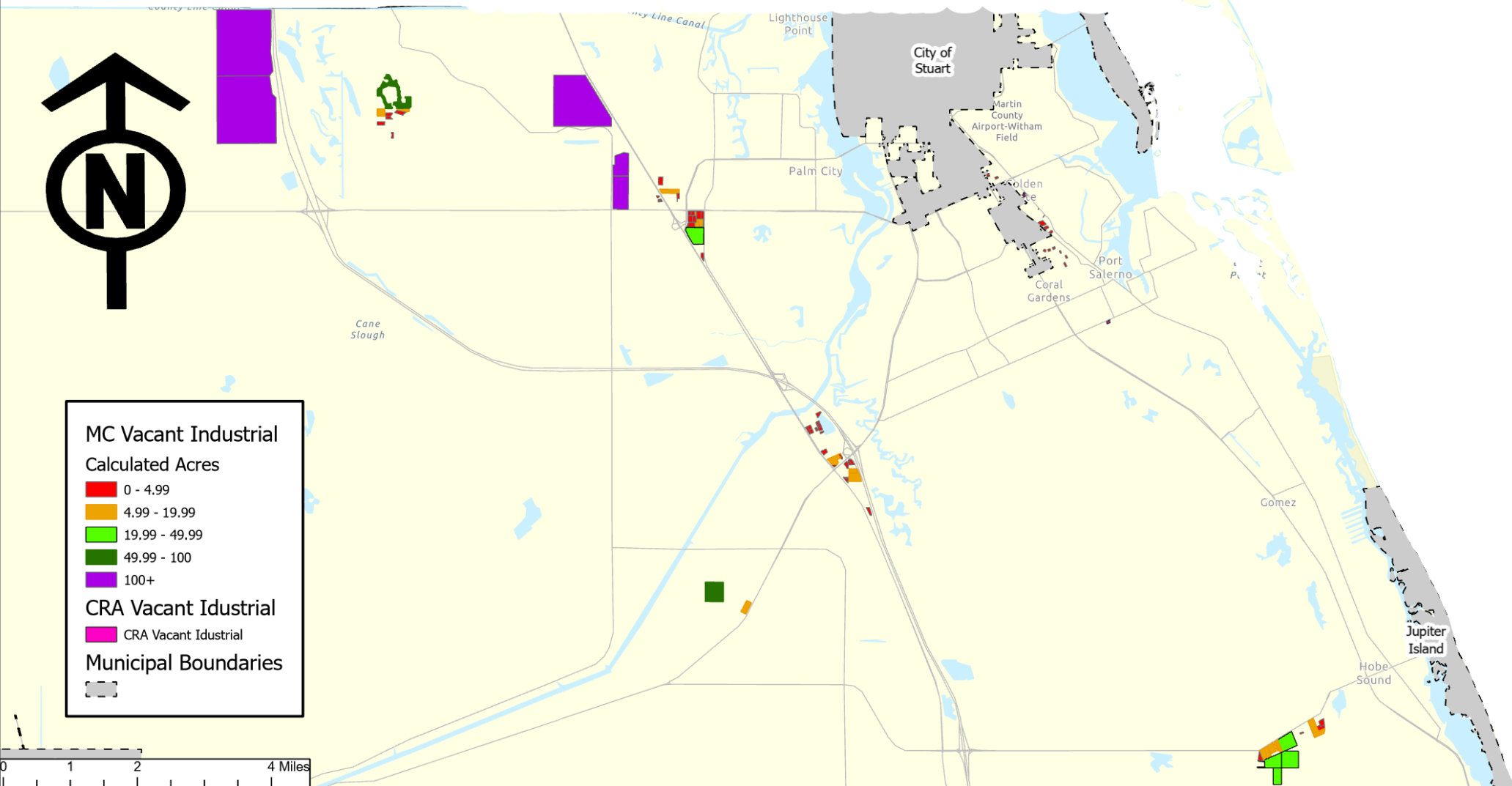
Projections of Florida Population by County, 2025–2050, with Estimates for 2021 (continued)

County and State	Estimates April 1, 2021	Projections, April 1					
		2025	2030	2035	2040	2045	2050
MARTIN	159,053						
Low		154,400	152,800	150,300	147,300	144,200	141,000
Medium		164,300	169,700	174,200	178,000	181,300	184,400
High		174,100	186,700	198,200	208,700	218,500	227,700

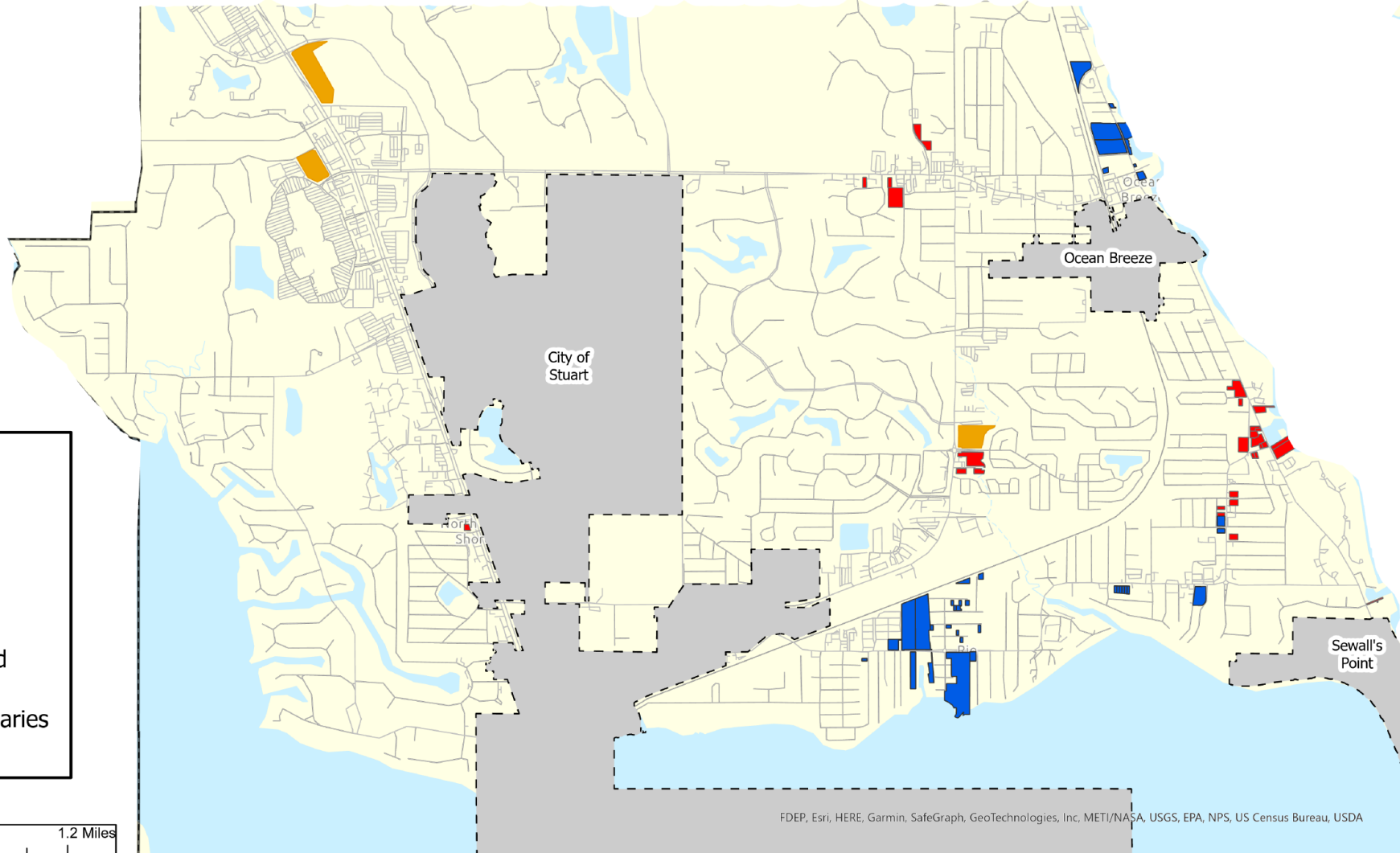
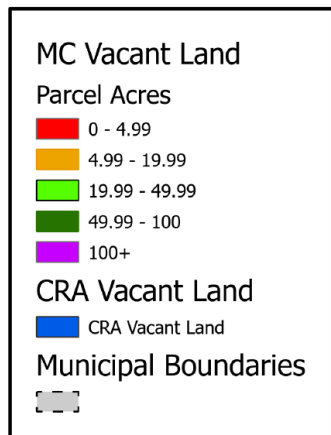
Unincorporated Martin County Vacant Commercial/Mixed-Use Parcels



Unincorporated Martin County Vacant Industrial Parcels



Unincorporated Martin County Vacant Commercial/Mixed-Use Parcels



FDEP, Esri, HERE, Garmin, SafeGraph, GeoTechnologies, Inc, METI/NASA, USGS, EPA, NPS, US Census Bureau, USDA

Unincorporated Martin County Vacant Industrial Parcels



**MC Vacant Industrial
Calculated Acres**

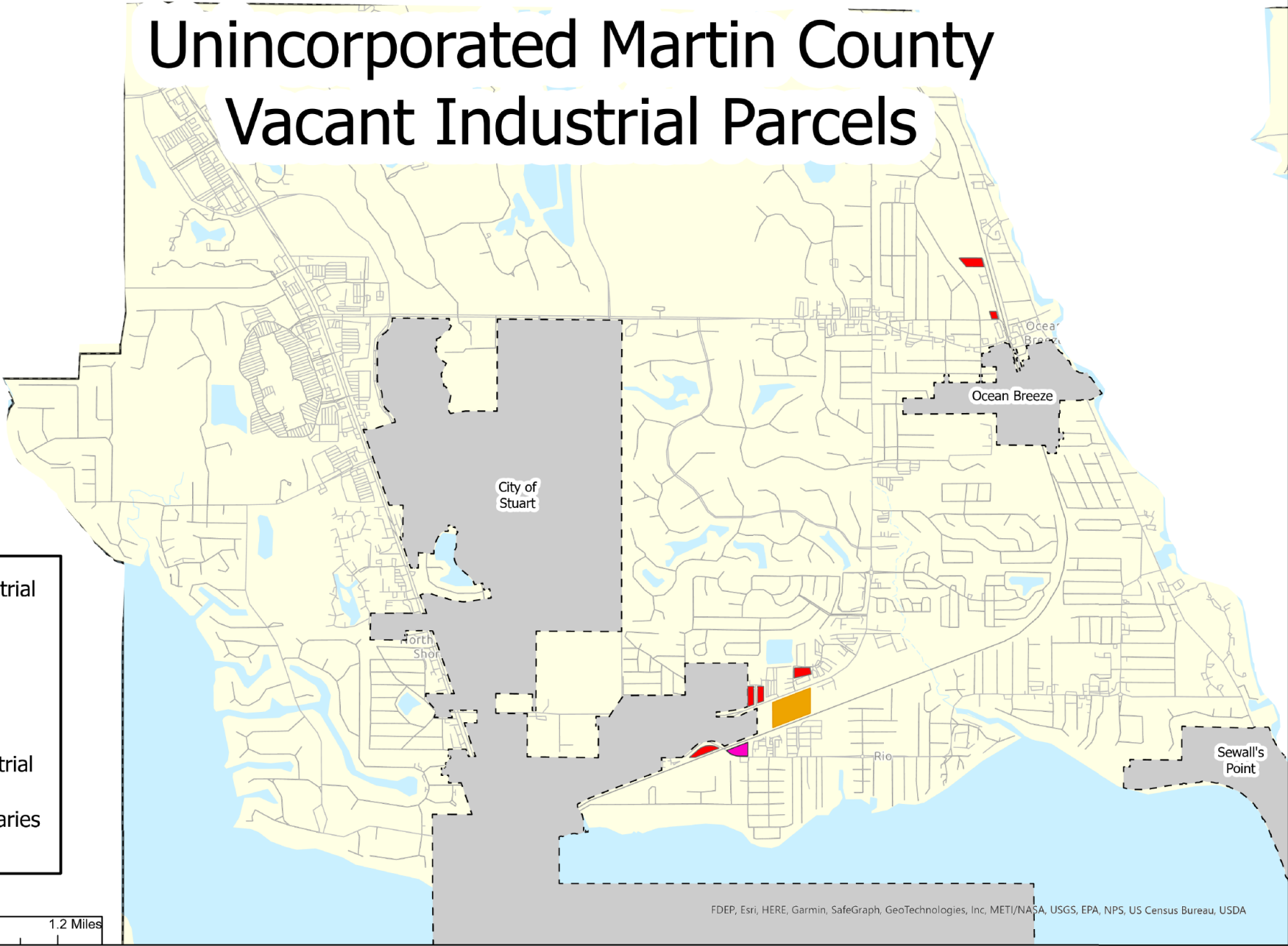
- 0 - 4.99
- 4.99 - 19.99
- 19.99 - 49.99
- 49.99 - 100
- 100+

CRA Vacant Industrial

- CRA Vacant Industrial

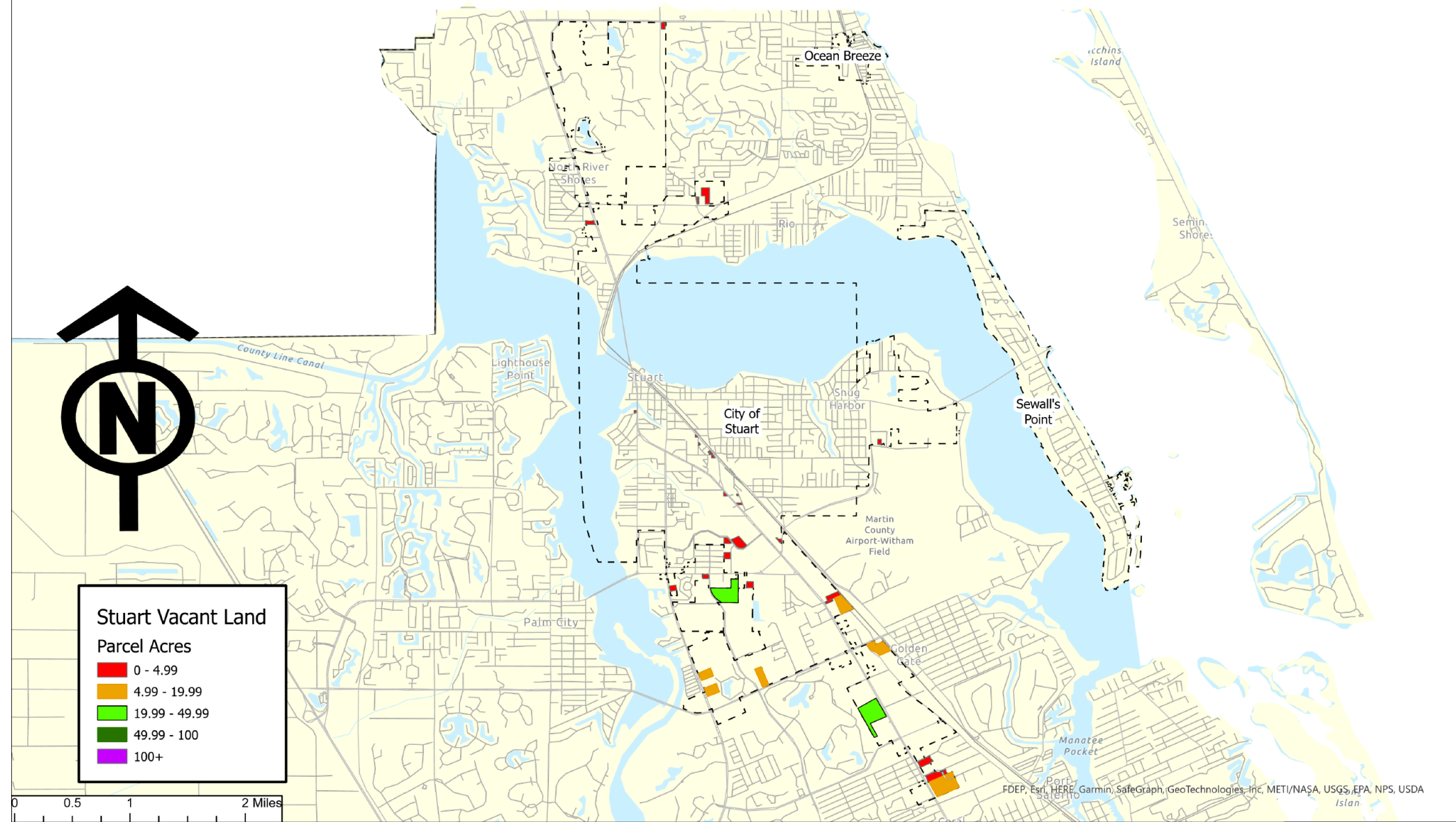
Municipal Boundaries

-

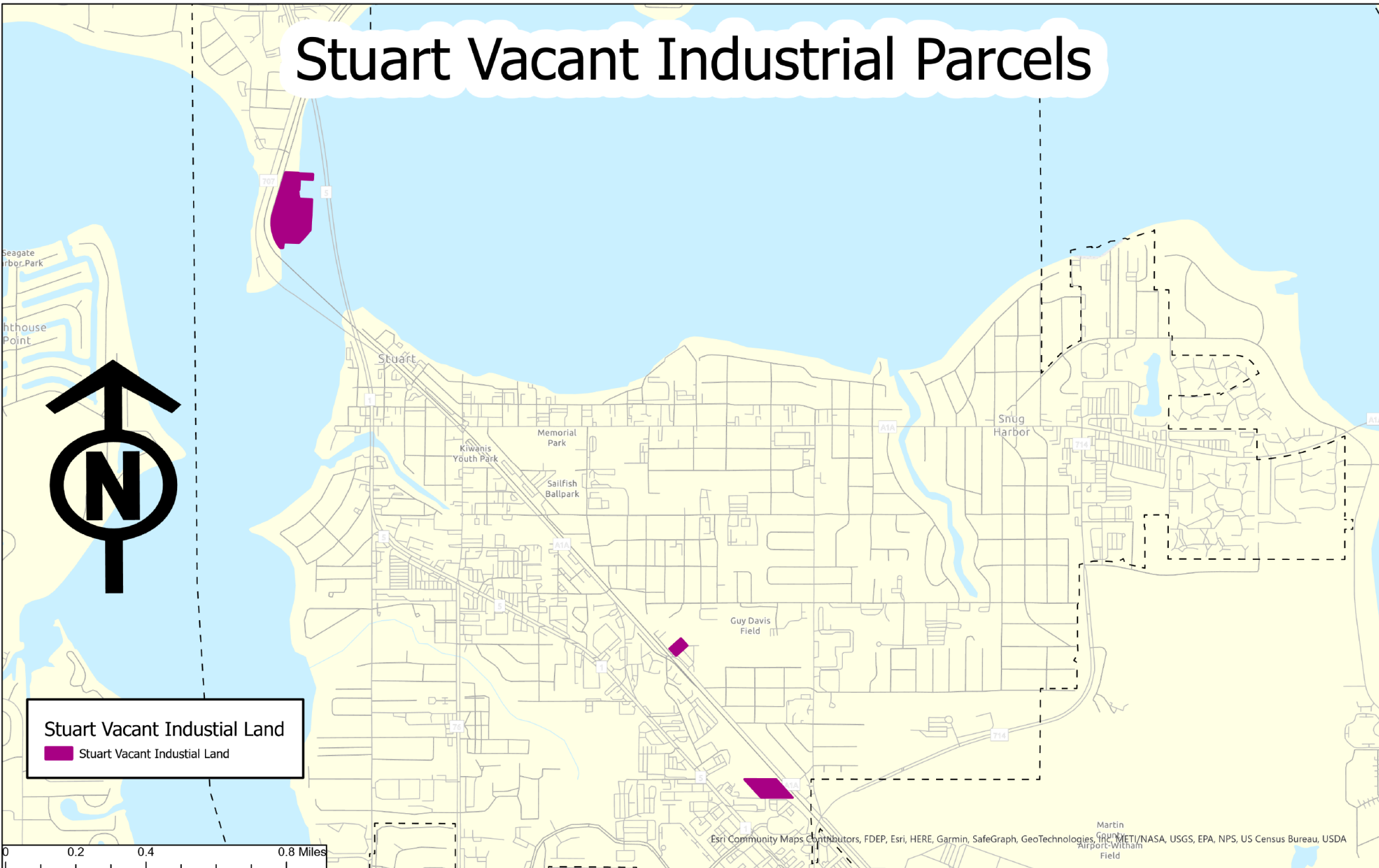


FDEP, Esri, HERE, Garmin, SafeGraph, GeoTechnologies, Inc, METI/NASA, USGS, EPA, NPS, US Census Bureau, USDA

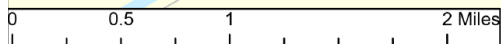
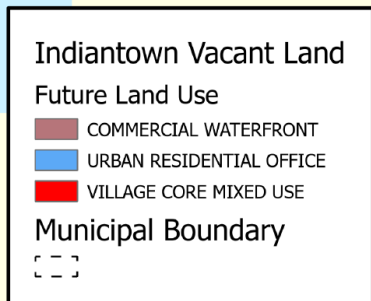
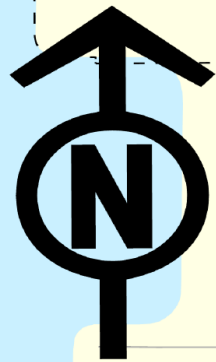
Stuart Vacant Commercial Parcels



Stuart Vacant Industrial Parcels



Indiantown Vacant Commercial/Mixed-Use Parcels



FDEP, Esri, HERE, Garmin, SafeGraph, GeoTechnologies, Inc, METI/NASA, USGS, EPA, NPS, USDA

Indiantown Vacant Industrial Parcels

