

Commercial and Industrial Land Analysis

Martin County 2023



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 resulted in a total of 1,939 acres.

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 | 38.8% |
| Golden Gate CRA | 22 | 1.1% |
| Hobe Sound CRA | 90 | 4.6% |
| Indiantown | 34 | 1.7% |
| Jensen Beach CRA | 11 | 0.6% |
| Ocean Breeze | 12 | 0.6% |
| Old Palm City CRA | 37 | 1.9% |
| Port Salerno CRA | 13 | 0.7% |
| Rio CRA | 17 | 0.9% |
| Sewall's Point | 12 | 0.6% |
| Unincorporated | 940 | 48.5% |
| Total | 1,939 | 100.0% |

Stuart has 39% 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.

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

Whereas commercial development is population driven, industrial development is policy driven. 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 – Plan Amendment Analysis

The database of developed commercial parcel acres created for Part I of this report was queried to sum the acres of new commercial development from 2011 through 2021. Approximately 152 acres of commercial development has occurred in all of Martin County since 2011. Since 152 acres is 7.8% of the total 1,939 commercial development acres in 2022, the projected population growth over the next 15 years may be a better indicator of the future commercial need.

The database of developed industrial parcel acres created for Part I of this report was also queried to find the industrial acres developed from 2011 through 2021. This analysis showed approximately 115 acres of industrial development took place in Martin County since 2011. Industrial development since 2011 represents about 7.7% of the total 1491 industrial developed acres in 2022.

Alternatively, to determine if there is enough vacant land to accommodate growth, BEBR 2022 Bulletin 192 was consulted for the current population and the projected population 15 years from now. These values will be used to extrapolate the necessary acres required to maintain a sufficient supply of vacant commercial and industrial lands. The projected change in population over the next 15 years is about 11% which is higher than the rate of development of commercial and industrial lands since 2011. Using the projected growth in population results in a more conservative (higher) demand for vacant lands to meet the needs of the future Martin County population.

Future Commercial and Industrial Acreage Requirement Analysis

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 | 1,939 | GIS parcel analysis |
| 5. Acreage needed in 2037 | 2,147 | Row 5 = Row 4 x Row 3 |
| 6. Additional acreage required for 15 year population increase | 208 | Row 6 = Row 5 - Row 4 |
| 7. Total commercial vacant acreage on FLUM | 954 | |
| 8. (Deficit)/Surplus | 746 | Row 8 = Row 7 - Row 6 |

The commercial acreage analysis in Row 5 establishes the number of Commercial acres needed in the year 2037. The number of acres needed is then subtracted from the number of vacant commercial acres available from Part II of this report (Row 7). The result provides a surplus of 746 Commercial acres.

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 | 1,491 | GIS parcel analysis |
| 5. Acreage needed in 2037 | 1,651 | Row 5 = Row 4 x Row 3 |
| 6. Additional acreage required for 15 year population increase | 160 | Row 6 = Row 5 - Row 4 |
| 7. Total industrial vacant acreage on FLUM | 3,182 | |
| 8. (Deficit)/Surplus | 3,022 | Row 8 = Row 7 - Row 6 |

The industrial acreage analysis in Row 5 establishes the number of Industrial acres needed in the year 2037. The number of acres needed is then subtracted from the number of vacant industrial acres available from Part II of this report (Row 7). The result provides a surplus of 3,022 Industrial acres.

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. This study shows there are ample vacant lands for both commercial and industrial uses to satisfy Martin County's needs for at least the next 15 years.

Conclusion

Demands for virtually every kind of need are population driven. As Martin County continues to grow, accurate and reliable forecasts for development demand, population growth, and commercial/industrial demand are crucial. Looking ahead to 2037, it has been possible to forecast the required supply for commercial and industrial acreage, to serve the County's future residents.

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, 1/2 of the acreage was allocated for future commercial development and 1/2 was allocated for future residential development.

Appendix B

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

Florida Population Studies



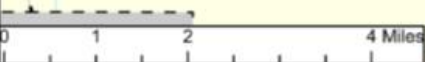
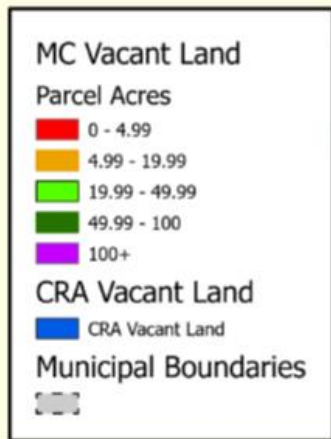
Volume 55, Bulletin 192
February 2022

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

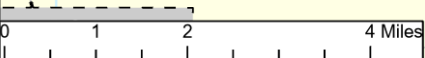
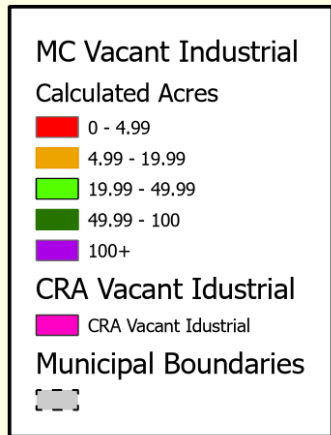
Projections of Florida Population by County, 2025–2050, with Estimates for 2021 (continued)

| 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 |

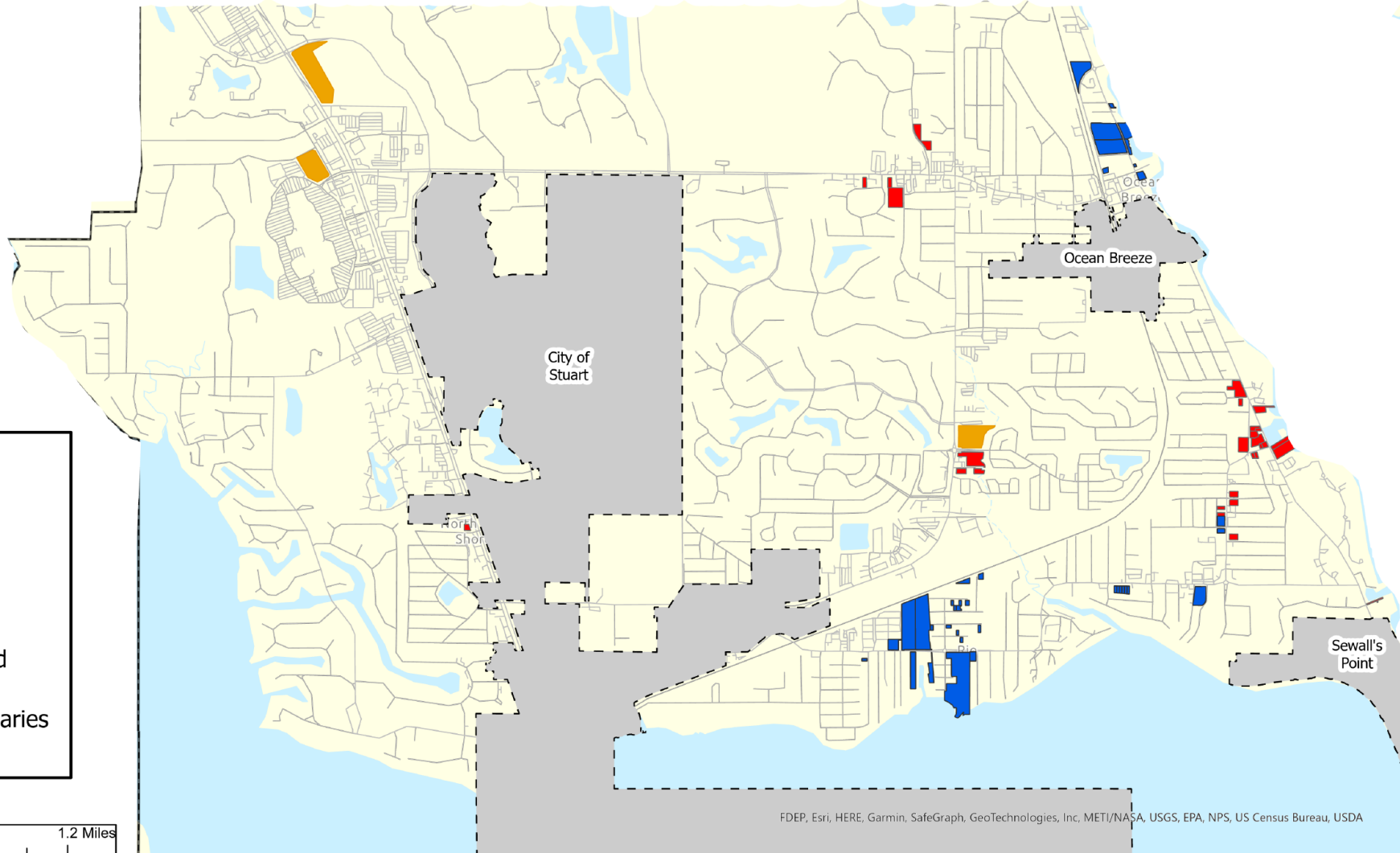
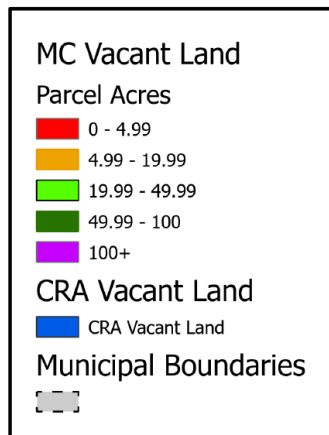
Unincorporated Martin County Vacant Commercial/Mixed-Use Parcels



Unincorporated Martin County Vacant Industrial Parcels

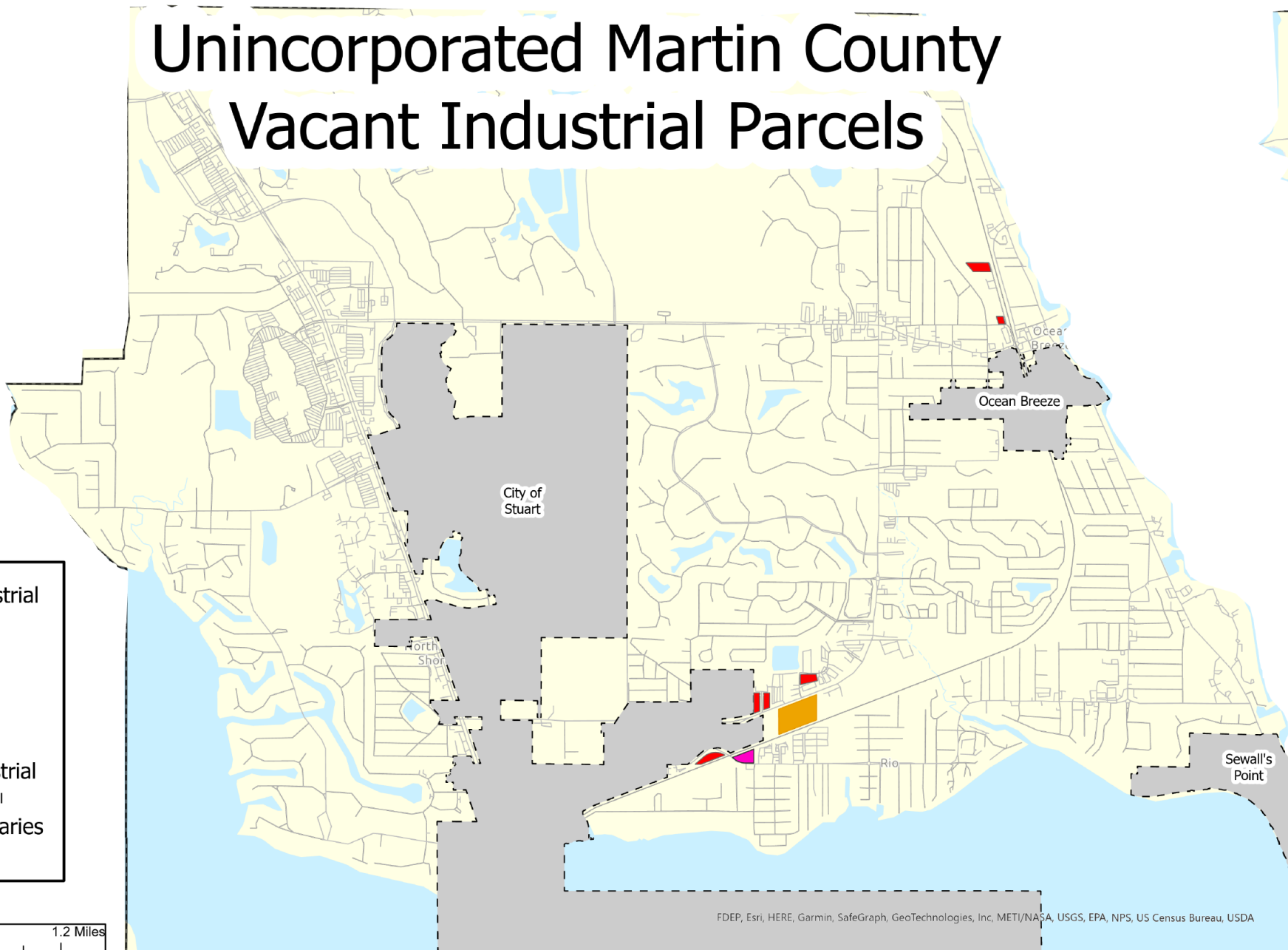
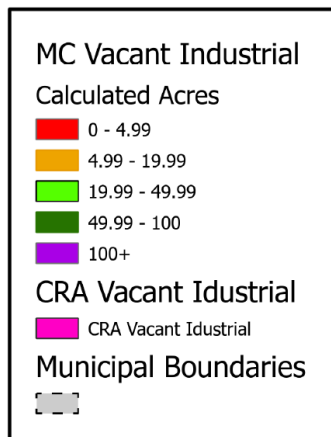
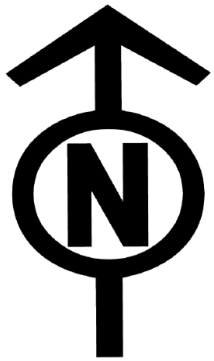


Unincorporated Martin County Vacant Commercial/Mixed-Use Parcels



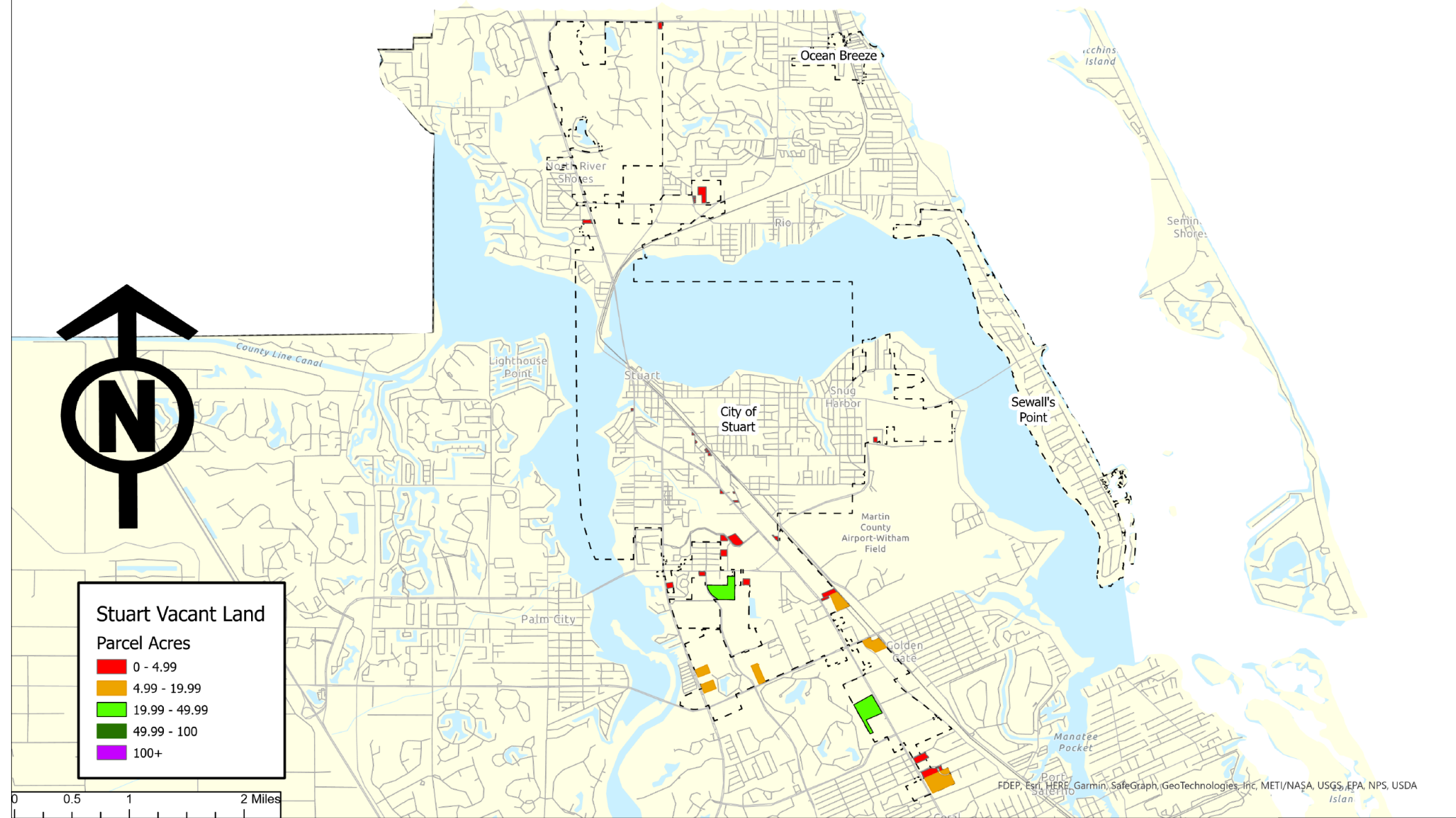
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Unincorporated Martin County Vacant Industrial Parcels

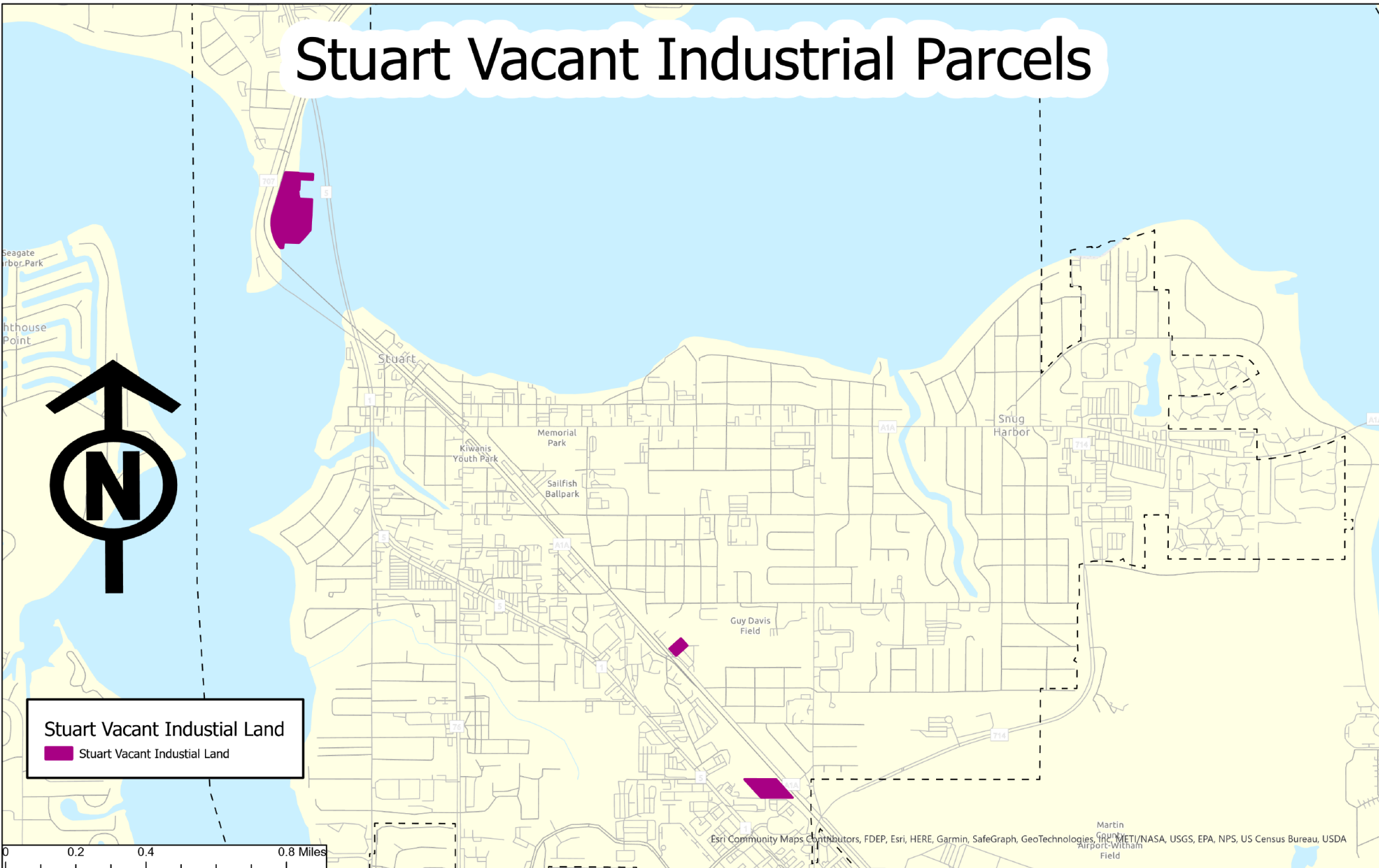


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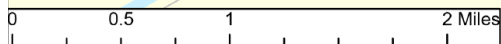
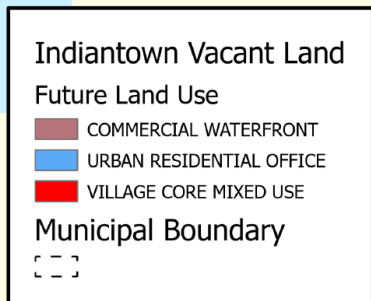
Stuart Vacant Commercial Parcels



Stuart Vacant Industrial Parcels

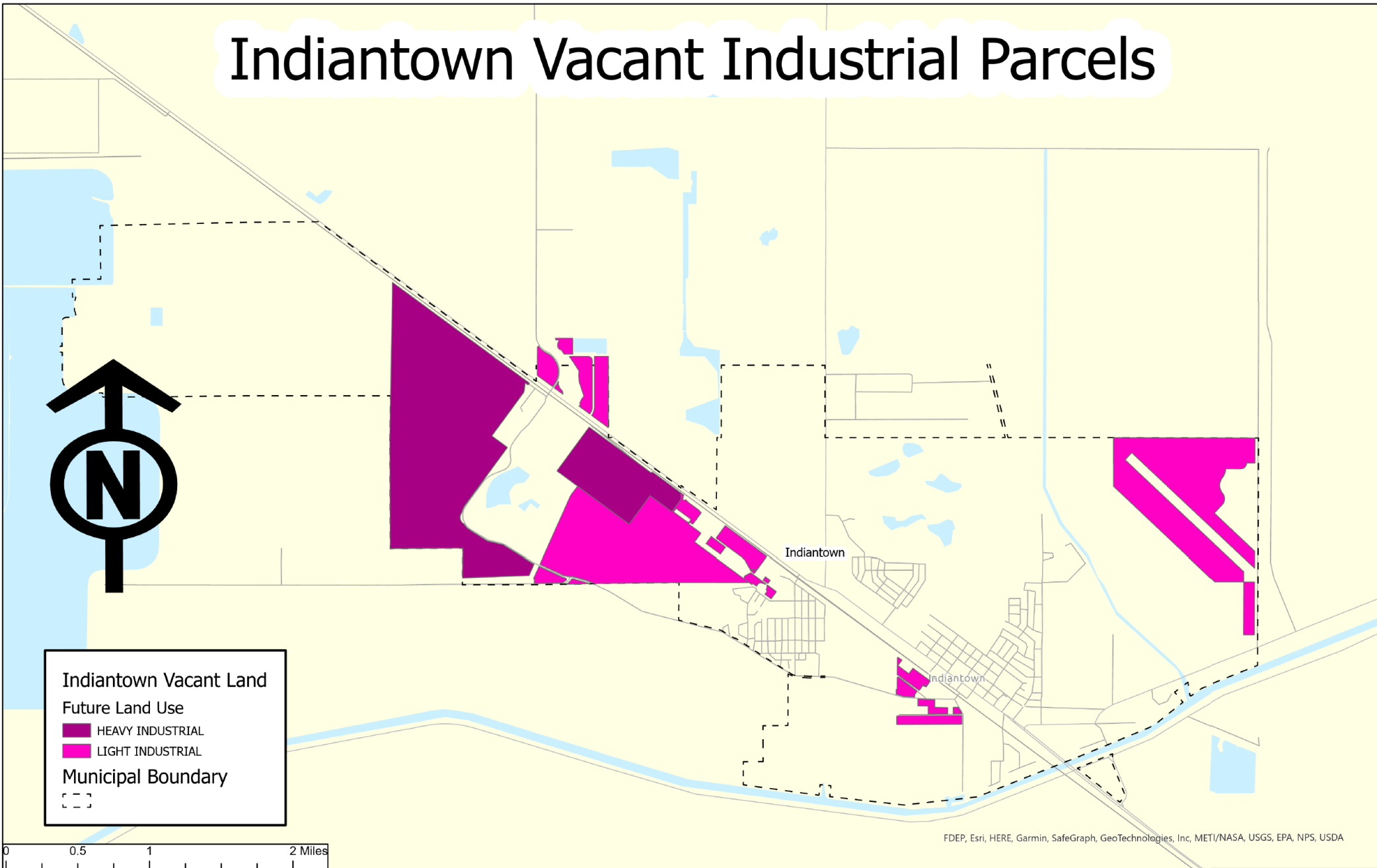


Indiantown Vacant Commercial/Mixed-Use Parcels



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

Indiantown Vacant Industrial Parcels



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