

2016

Commercial and Industrial Land Analysis

Martin County Board of County Commissioners

Prepared by the
Growth Management Department



Approved
June 14, 2016

INTRODUCTION

Goal 4.10 and Goal 4.11 of the Martin County Comprehensive Growth Management Plan (CGMP) require the County to “provide for adequate and appropriate sites” for commercial and industrial land uses to serve the needs of the County’s anticipated residents and visitors. This report updates the County’s information regarding commercial and industrial future land use designations which will assist the County in achieving Goals 4.10 and 4.11 of the CGMP.

This report is made up of three parts. Part I shows the amount of acreage developed as commercial and industrial uses. Part II provides an inventory of vacant commercial and industrial parcels. This does not contain parcels that have approved site plans. A list of approved site plans can be found in Appendix I. Part III is an analysis to help guide the County’s implementation of Policy 2.4C.3 of the Comprehensive Growth Management Plan, which limits Commercial and Industrial land use amendments to that needed for projected population growth in the next 15 years.

Part I – Developed Commercial and Industrial Acreage

It is beyond the scope of this report to attempt to quantify the square footage of existing commercial and industrial facilities that may be vacant and available for lease. The exclusion of such properties could potentially overstate the amount of commercial or industrial land needed.

To aide in the implementation of the policy above, staff has created an inventory of acreage that is currently developed as commercial and industrial uses. To do this, a query was created in the County’s Geographic Information System (GIS) using the Property Appraiser’s data on Department of Revenue (DOR) codes of property uses. All parcels are within the Primary Urban Service District boundaries. All data from municipalities was removed. A detailed methodology on the GIS process is available in the Growth Management Department. The following DOR codes were queried:

711 - Stores	732 – Enclosed Theatres/Auditorium
712 - Mixed use/store/office	733 – Nightclub Bars Lounges
713 – Department store	734 – Bowling alley/skating rink
714 – Supermarket	735 – Tourist Attraction/Permanent exhibit
715 – Regional Shopping Center	736 – Camps
716 – Community Shopping Center	737 – Race track horse auto dog
717 – Office Building 1 story	738 - Golf course/driving range
718 – Office Building multistory	739 – Hotels/motels
719 – Prof serv/Medical offices	746 – Other food proc: baker/candy
720 – Marina/air/bus terminals	804 – Warehouse condo
721 – Restaurant/cafeterias	841 – Light equipment manufacturing
722 – Drive-in Restaurants	842 – Heavy equipment manufacturing
723 – Financial institutions	843 – Lumber yards, sawmills
724 – Insurance office	844 – Packing Plant/fruit/veg/meat
725 – Repair service shops	845 – Cannery Fruit/veg/brewers
726 – Service Station	847 – Mineral process Cement Phosp
727 – Auto Sales/Repair	848 – Warehouse distribution terminal
729 – Wholesale and Manufacturing outlets	849 – Open storage junk yard
730 – Florists/Greenhouses	910 – Utility Gas Electric Telephone
731 – Drive-in Theatre/Open stadium	960 – Sewage disposal solid waste

The query resulted in a total of 1,321 acres of developed Commercial land and a total of 4,815 acres of developed Industrial land.

Part II – Vacant Commercial and Industrial Land

The County strives to maintain a continuum of sites for business opportunities with a focus on sites with the correct land use and zoning, that are large enough to be buildable, and that have necessary infrastructure available or in place.

To accomplish this, the following site parameters were established:

- Sites with a Future Land Use Designation of Commercial or Industrial;
- Sites that have a Category “A” Zoning District that is compatible with the Future Land Use designation;
- Sites of 5 acres or more;
- Sites that are served or adjacent to water and sewer services;
- Sites that are not located on road segments that have concurrency constraints.

METHODOLOGY

The inventory includes only those parcels in unincorporated Martin County that have an Industrial or Commercial Future Land Use Designation. All parcels are within the Primary Urban Service District boundaries. The commercial inventory includes General Commercial, Limited Commercial, Commercial/Office/Residential (COR) and Commercial Waterfront.

Starting with the Future Land Use GIS layer, the following future land uses were queried:

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

A geoprocess was performed that attached the future land use attributes of the query above to a Parcel layer. A new layer was created that contained parcel and land use data. From that new layer, the DOR property use codes listed below were queried and a new layer was extracted.

352 – Cropland	670 – Vacant Institutional
357 – Timber Site Index 4	700 – Vacant Commercial
363 – Grazing Land Soil Capacity 3	800 – Vacant Industrial
364 – Grazing Land Soil Capacity 4	989 – Muni other than prev cvrd
365 – Grazing Land Soil Capacity 5	990 – Vacant Acreage
366 – Orchard, Groves, Citrus, etc	991 – Acreage with Nominal
367 – Poultry, Bees, Tropical fish etc	Improvement
369 – Ornamentals Misc agric	992 – Vacant Acreage No Classed Ag

Next, the sites were categorized according to the zoning district designation on each site: Category A zoning district sites are compatible with the underlying Future Land Use Designation and Category C zoning districts in most cases require a rezoning prior to new development. For part of the Category A analysis, parcels were removed that did not have water and sewer services and/or had road concurrency issues. For the Category C analysis, vacant parcels with Category C zoning were extracted into a layer. The resulting Category A and Category C inventories were verified using the 2014 aerial photography. Figure 1 is a map of all vacant Commercial land before the site criteria was applied. Figures 1A through 1F show the same land zoomed in to different areas of the County. Figure 2 is a map of all vacant Industrial land before the site criteria was applied. Figures 2A through 2F show the same land zoomed in to different areas of the County.

A detailed methodology is available in the Growth Management Department.

Total Commercial Vacant Acreage before applying criteria: 842 acres

Size Category	Number of parcels	Total Acreage
Greater than 50 acres	1	75
20 – 50 acres	9	269
5 – 20 acres	24	188
1 – 5 acres	383	310
Total	417	842

Total Industrial Vacant Acreage before applying criteria: 3,399 acres

Size Category	Number of parcels	Total Acreage
Greater than 50 acres	10	1,917
20 – 50 acres	6	180
5 – 20 acres	23	278
1 – 5 acres	82	124
Total Industrial	124	2,499
AgTEC	3	900
Total	127	3,399

RESULTS AFTER APPLYING CRITERIA

1. “Category A” with Compatible Land Use

Commercial: 484.49 acres

<u>Future Land Use</u>	<u>Acres</u>	<u>Parcels</u>
Comm. General	192.81	40
Comm. Limited	46.85	37
Comm. Waterfront	163.79	13
Comm/Off/Res	40.55	22
Comm. General/Comm. Limited	5.8	1
Comm/Off/Res / & Comm. Limited	34.69	1
	<hr/> 484.49	<hr/> 114

Industrial: 2,187 acres

<u>Future Land Use</u>	<u>Acres</u>	<u>Parcels</u>
Industrial	1,286.77	69
AgTEC	900	3

2. “Category A” with Compatible Land Use, Greater than 5 acres in size

Commercial: 376 acres

<u>Future Land Use</u>	<u>Acres</u>	<u>Parcels</u>
Comm. General	139.76	12
Comm. Limited	24.39	2
Comm. Waterfront	154.9	4
Comm/Off/Res	16.74	3
Comm. General/Comm. Limited	5.8	1
Comm/Off/Res / & Comm. Limited	34.69	1
	<hr/> 376.28	<hr/> 23

Industrial: 2,125 acres

<u>Future Land Use</u>
Industrial: 22 parcels totaling 1,225 acres
AgTEC: 3 parcels totaling 900 acres

3. “Category A” with Water and Sewer, No concurrency Issues

Commercial: 17 parcels totaling 328 acres

<u>Future Land Use</u>	<u>Acres</u>	<u>Parcels</u>
Comm. General	106.53	7
Comm. Limited	24.39	2
Comm. Waterfront	140.04	3
Comm/Off/Res	16.74	3
Comm. General/Comm. Limited	5.8	1
Comm/Off/Res / & Comm. Limited	34.69	1
	<u>328.19</u>	<u>17</u>

Industrial: 10 parcels totaling 611 acres

“Category C” Analysis

This analysis looked at the commercial and industrial parcels that have Category C zoning.

Category C

Commercial: 285 parcels totaling 357 acres

Industrial: 51 parcels totaling 1,212 acres

Part III – Plan Amendment Analysis

Policy 2.4C.3 of the Comprehensive Growth Management Plan states:

Policy 2.4C.3. The county shall limit commercial and industrial land use amendments to that needed for projected population growth for the next 15 years. This shall be related to the increase in developed commercial and industrial acreage in relation to population increases over the preceding ten years.

For implementation of Policy 2.4C.3, staff has proposed a methodology to determine whether the amount of Commercial and Industrial acreage available accommodates what is needed in the 15 year planning period. This methodology assumes that the current ratio of commercial and industrial land is appropriate and that the same ratio in the future is sufficient to meet future need. Since permanent, peak and weighted average population have grown over time at the same rate, permanent population for the unincorporated area is used to show increased need for non-residential land use.

The acreages used in this analysis are from the developed land analysis in Part I and the total vacant acreage (before applying criteria) from the land use analysis in Part II.

Future Commercial Acreage

Source:		
1. 2015 Permanent Unincorporated Population	130,261	2015 Population Technical Bulletin
2. 2030 Permanent Unincorporated Population	148,208	
3. Ratio of growth	1.13	Row 2 divided by Row 1
4. Developed Commercial Acreage	1,321 acres	Part I Commercial Industrial Inventory
5. Acreage needed in 2030	1,492	Row 5 = Row 4 x Row 3
6. Additional acreage required for 15 year population increase	171 acres	Row 6 = Row 5 – Row 4
7. Total Commercial vacant acreage on FLUM	842 acres	Part II Commercial Industrial Inventory
8. (Deficit)/Surplus	671 acres	Row 8 = Row 7 – Row 6

Row 5 establishes the number of Commercial acres needed in the year 2030. The number of acres needed is then subtracted from the number acres available on the FLUM that is vacant (Row 7).

The result provides a surplus of Commercial acres of 671 acres. The same methodology is used for the Industrial analysis below, resulting in a surplus of 2,773 acres.

Future Industrial Acreage

Source:		
1. 2015 Permanent Unincorporated Population	130,261	2015 Population Technical Bulletin
2. 2030 Permanent Unincorporated Population	148,208	
3. Ratio of growth	1.13	
4. Developed Industrial Acreage	4,815 acres	Part I Commercial Industrial Inventory
5. Acreage needed in 2030	5,441	Row 5 = Row 4 x Row 3
6. Additional acreage required for 15 year population increase	626 acres	Row 6 = Row 5 – Row 4
7. Total Industrial vacant acreage on FLUM (includes AgTEC)	3,399 acres	Part II Commercial Industrial Inventory
8. (Deficit)/Surplus	2,773 acres	Row 8 = Row 7 – Row 6

It should be noted that in the Industrial Future Land Use, some Commercial uses are permitted. For example, business and professional offices, hotels/motels and restaurants are permitted in both Light Industrial and General Industrial zoning districts; retail stores are permitted in the Light Industrial category. In the developed Industrial acreage, 54 parcels, totaling 114 acres, have

Commercial uses. The 114 acres represents just 2.4% of total developed Industrial acreage, therefore this is not significant to the overall results.

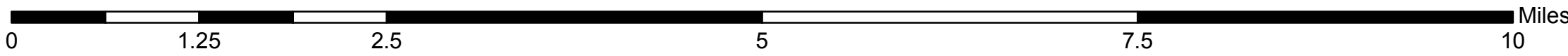
If the “Category A with Water and Sewer, No concurrency Issues” vacant Commercial acreage of 328 acres from Part II was used in the analysis above, there would be a surplus of 157 vacant commercial acres. If the “Category A with Water and Sewer, No concurrency Issues” vacant industrial acreage of 611 acres from Part II was used in the analysis above, added together with AgTEC, there would be a 885 acre surplus of Industrial Acreage.

Not included in the analysis above are approved, but unbuilt master or final site plans. A list of approved site plans can be found in Appendix I. The site plans were not classified as either vacant or developed land. There are 6 commercial site plans, totaling 141 acres. There are 8 industrial site plans, totaling 1,011 acres. Of those, 9 are subdivisions. Many are designed for specific businesses. This list can be provided upon request.



Vacant Commercial Land

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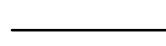

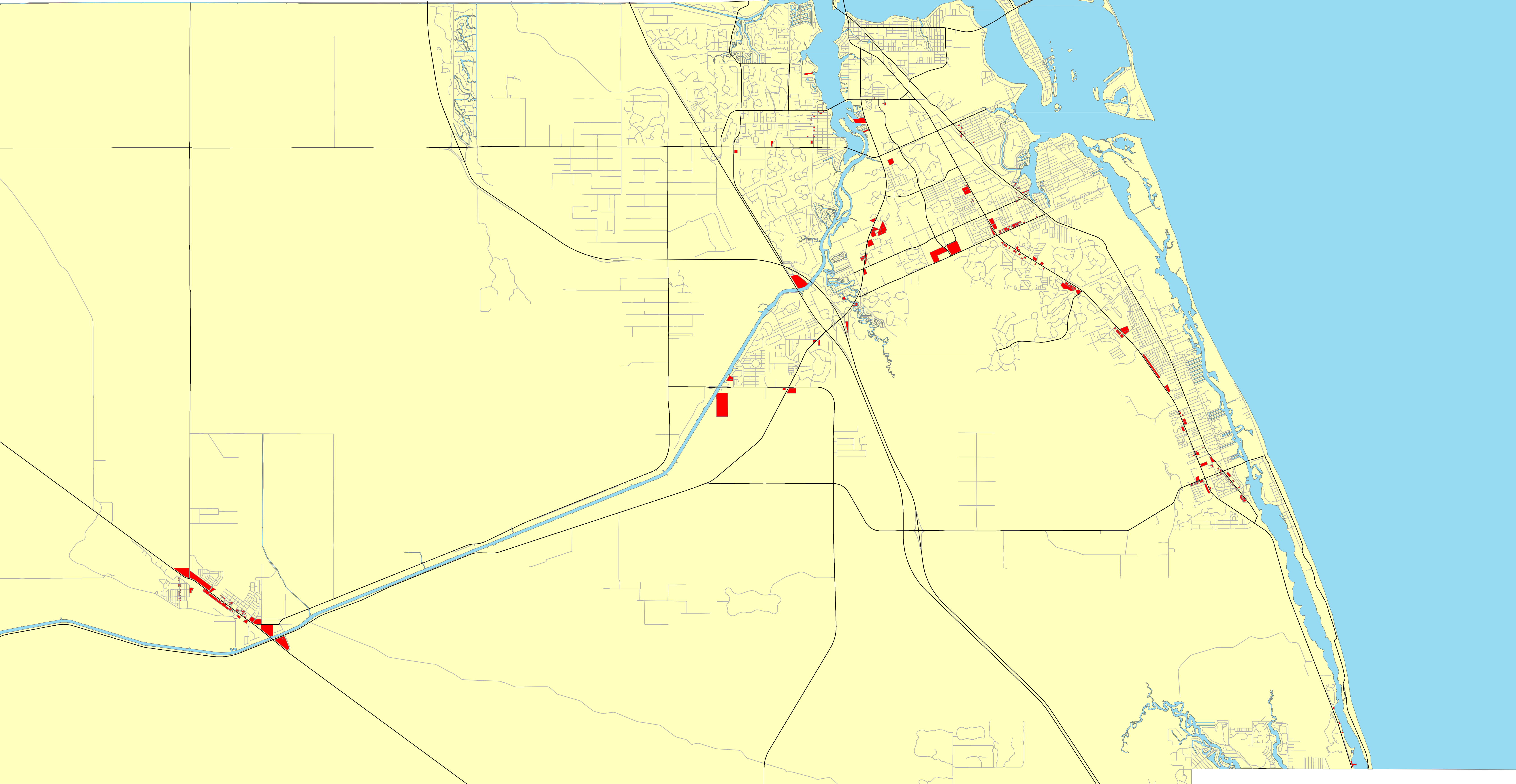
-  Vacant Commercial Land
-  Major Roads
-  Roads

Figure 1

417 Parcels





Vacant Commercial Land North

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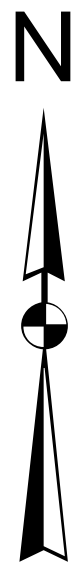
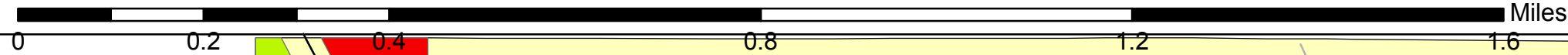
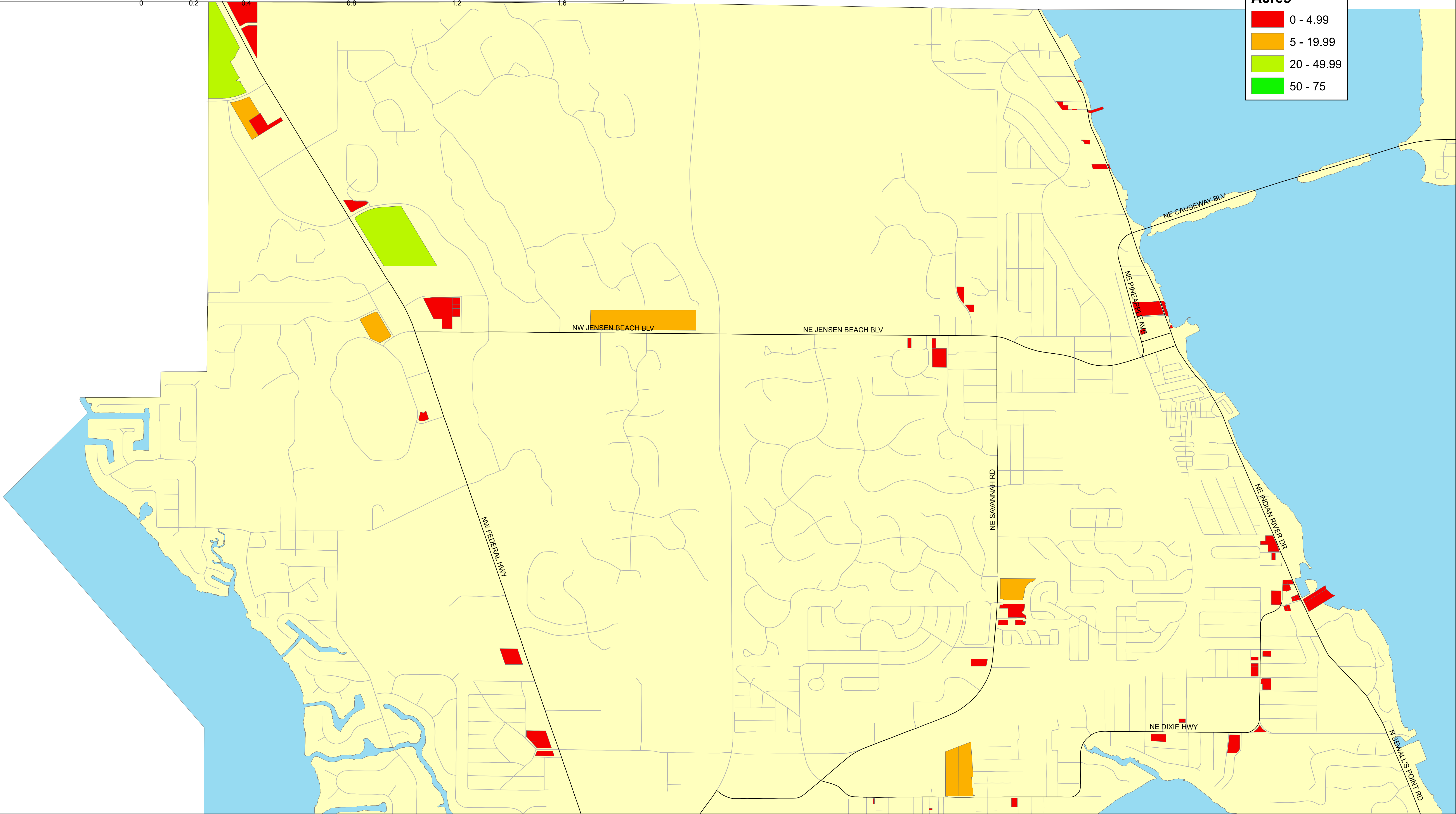
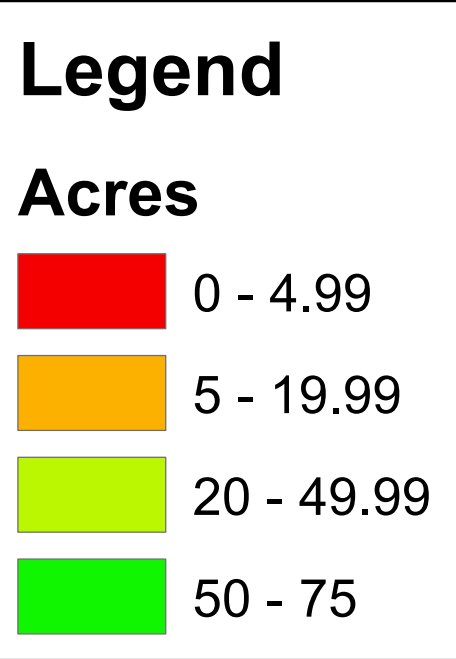


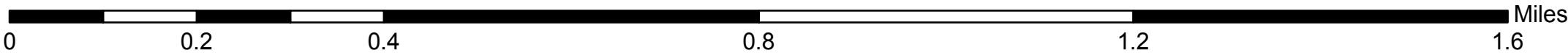
Figure 1A





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Vacant Commercial Land South



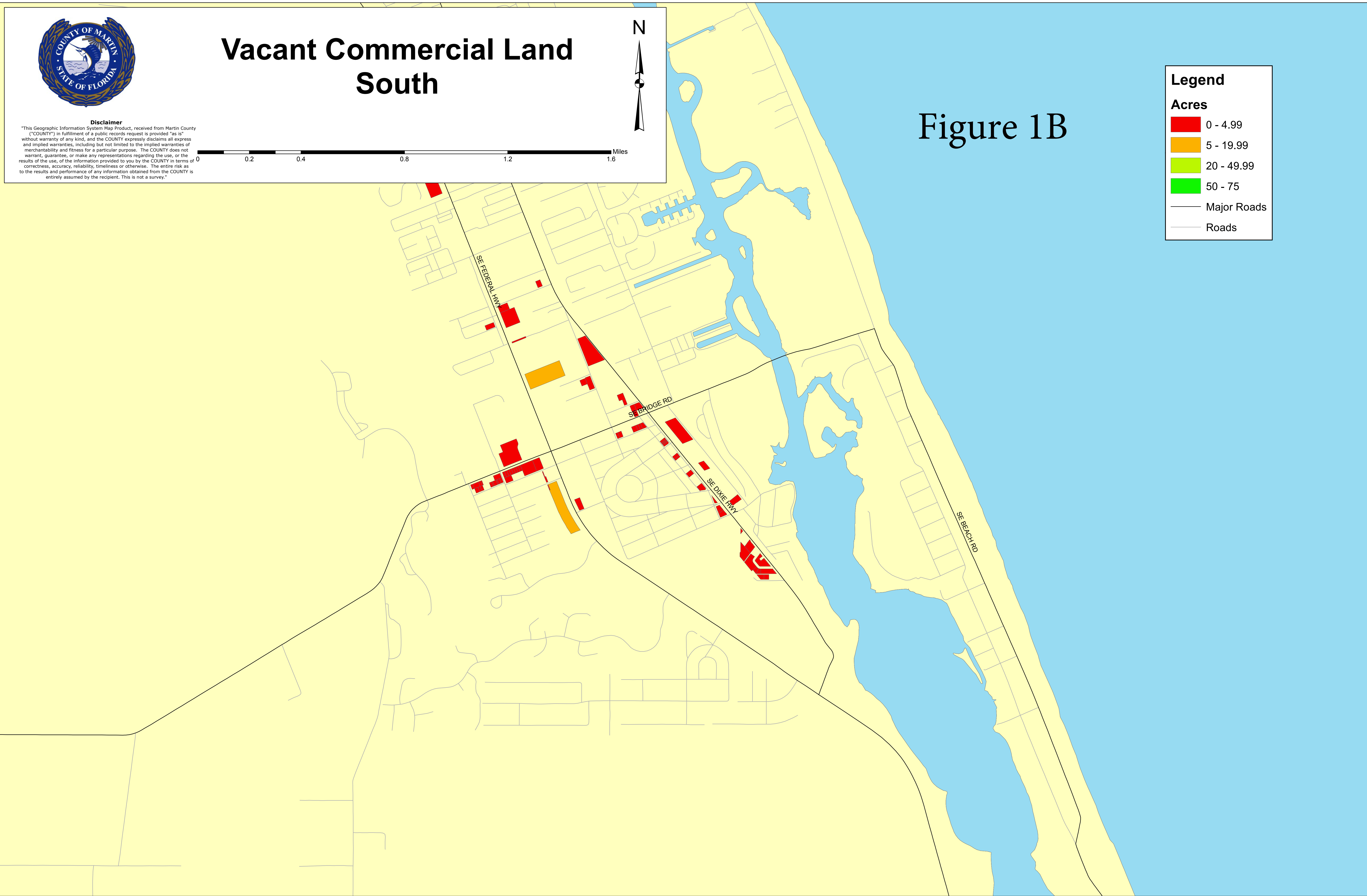
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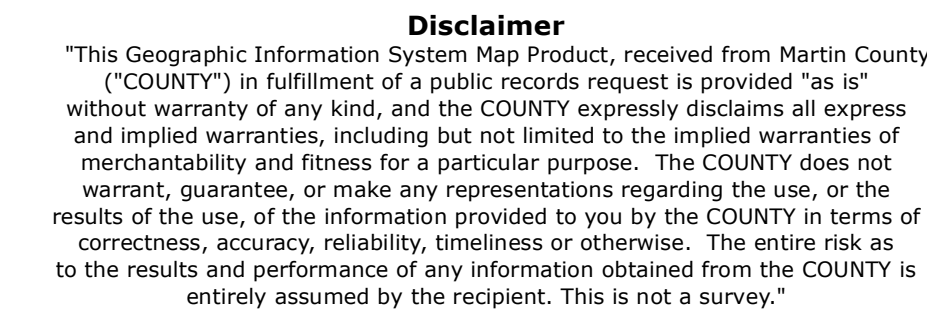
Acres

- 0 - 4.99
- 5 - 19.99
- 20 - 49.99
- 50 - 75

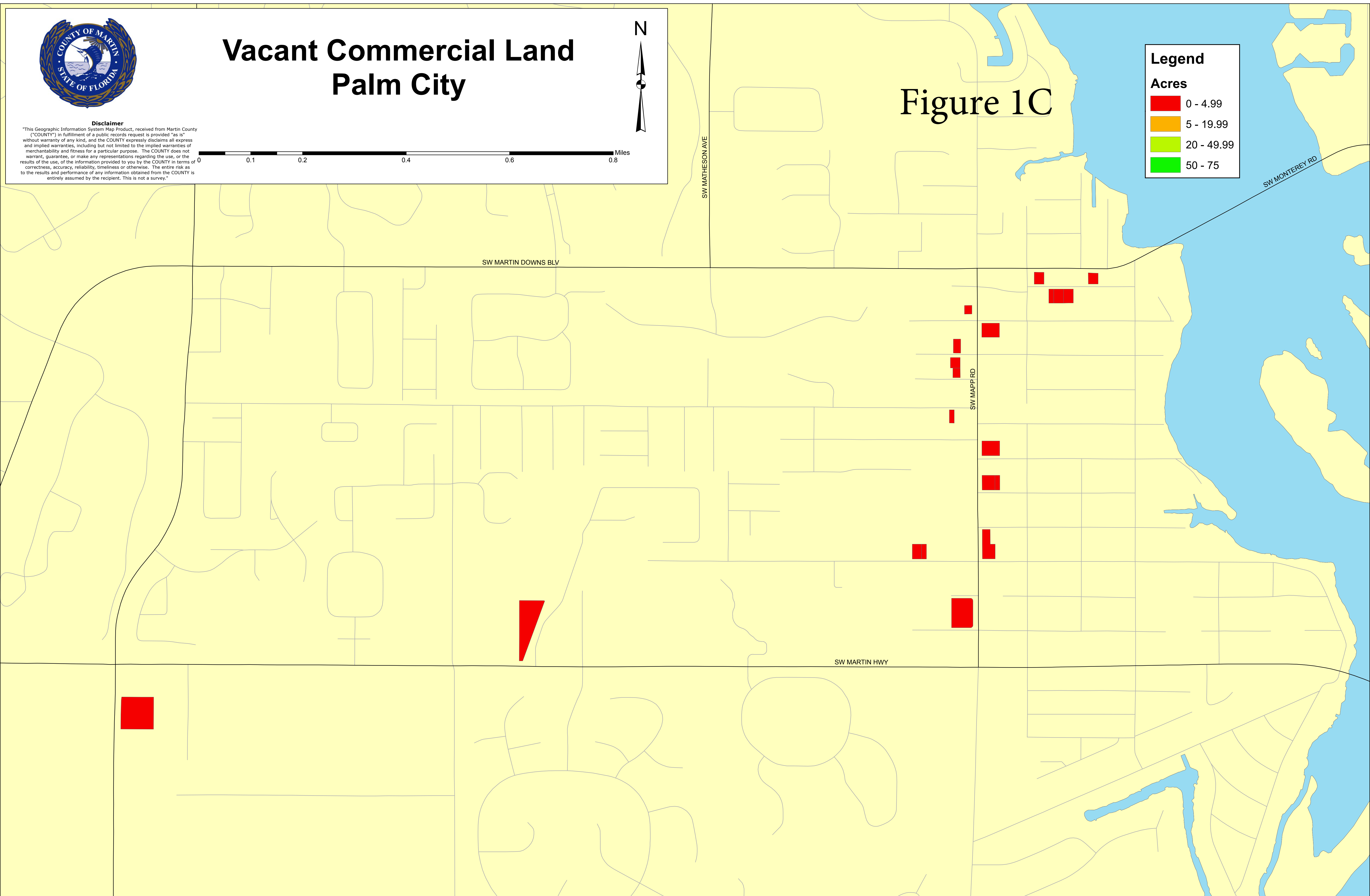
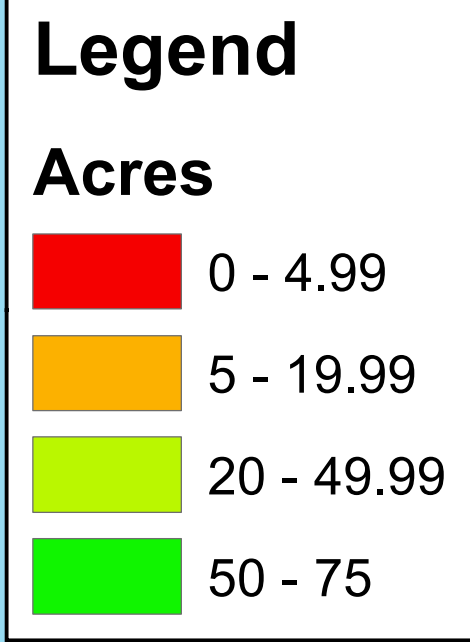
- Major Roads
- Roads

Figure 1B



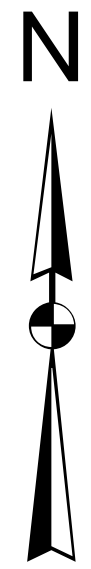


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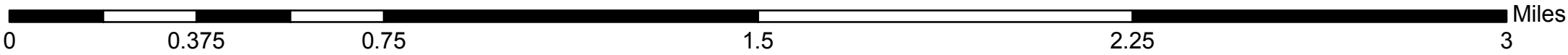




Vacant Commercial Land Mid-County



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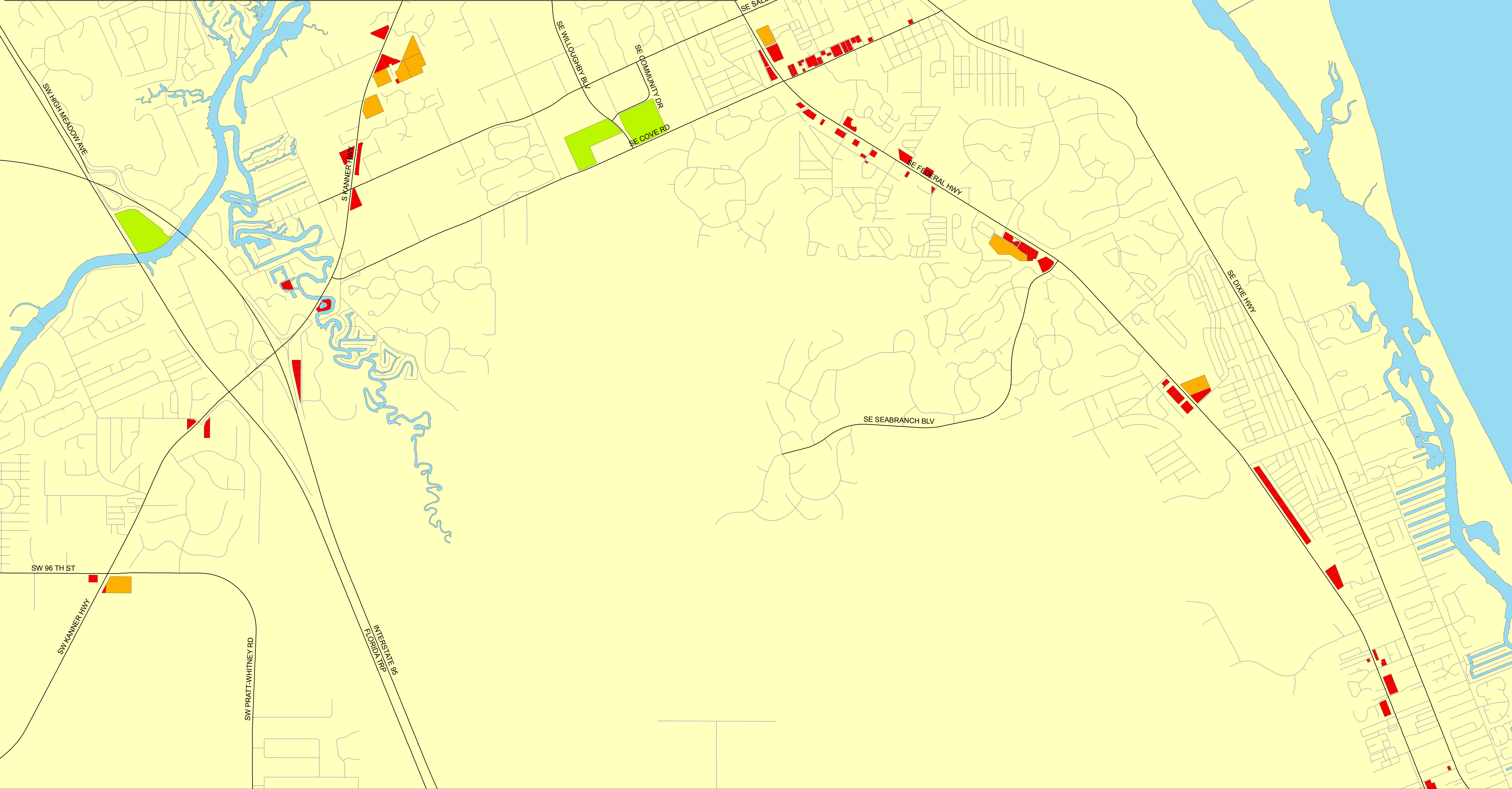


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Acres

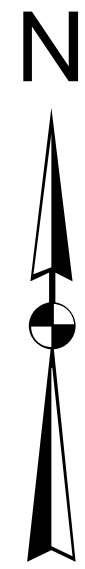
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<div></div>	50 - 75

Figure 1D





Vacant Commercial Land Stuart



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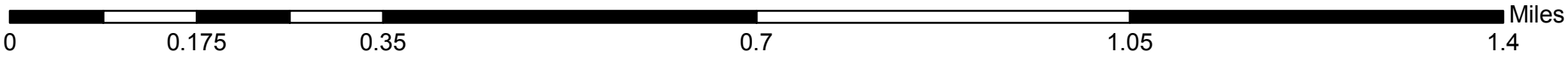


Figure 1E

Legend

Acres

0 - 4.99

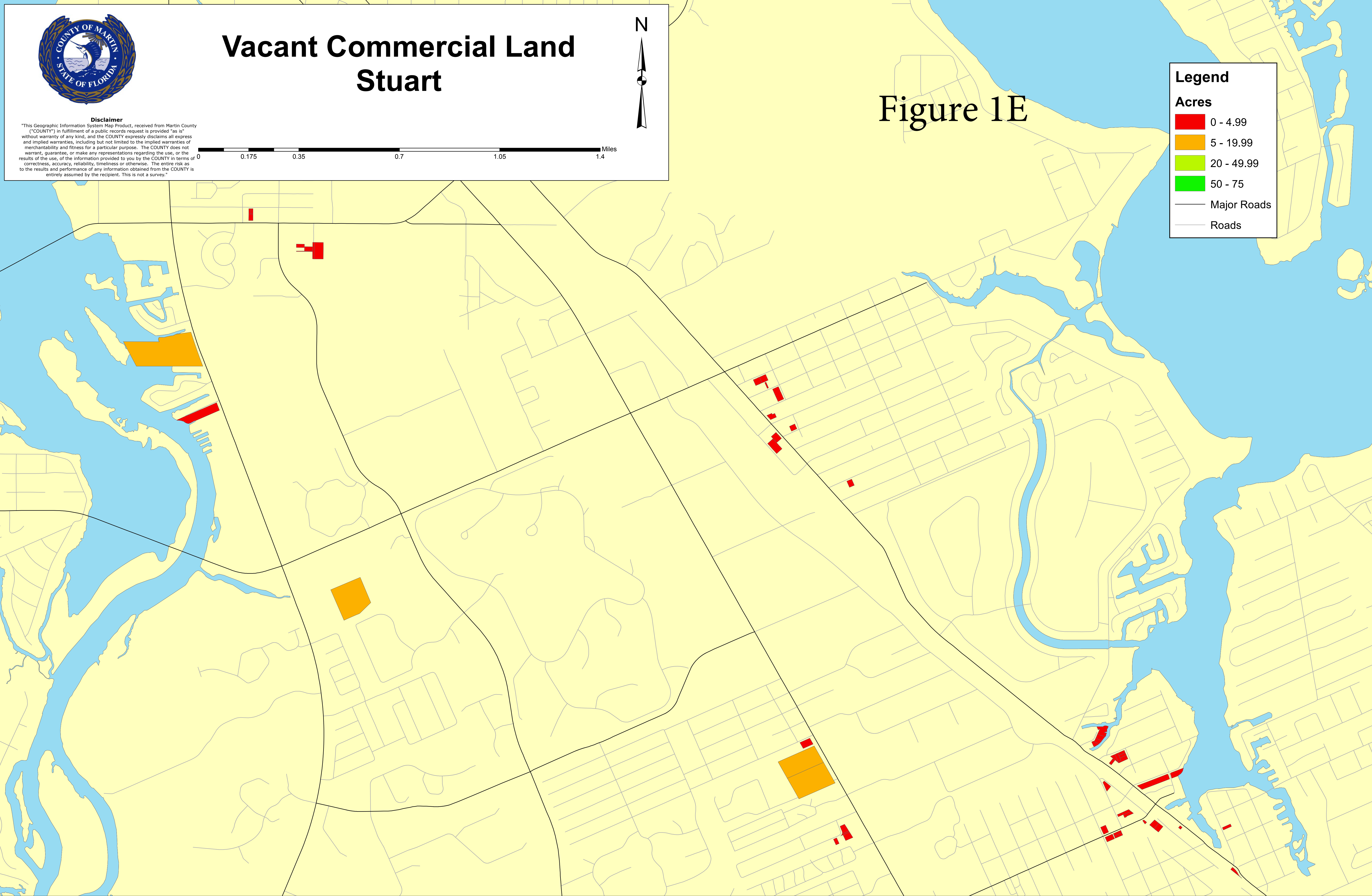
5 - 19.99

20 - 49.99

50 - 75

Major Roads

Roads





Vacant Commercial Land Indiantown



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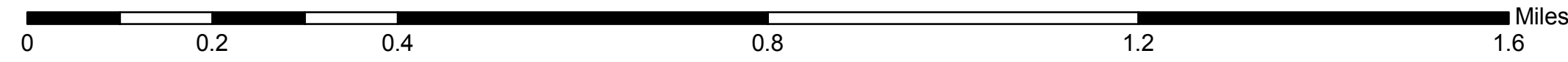
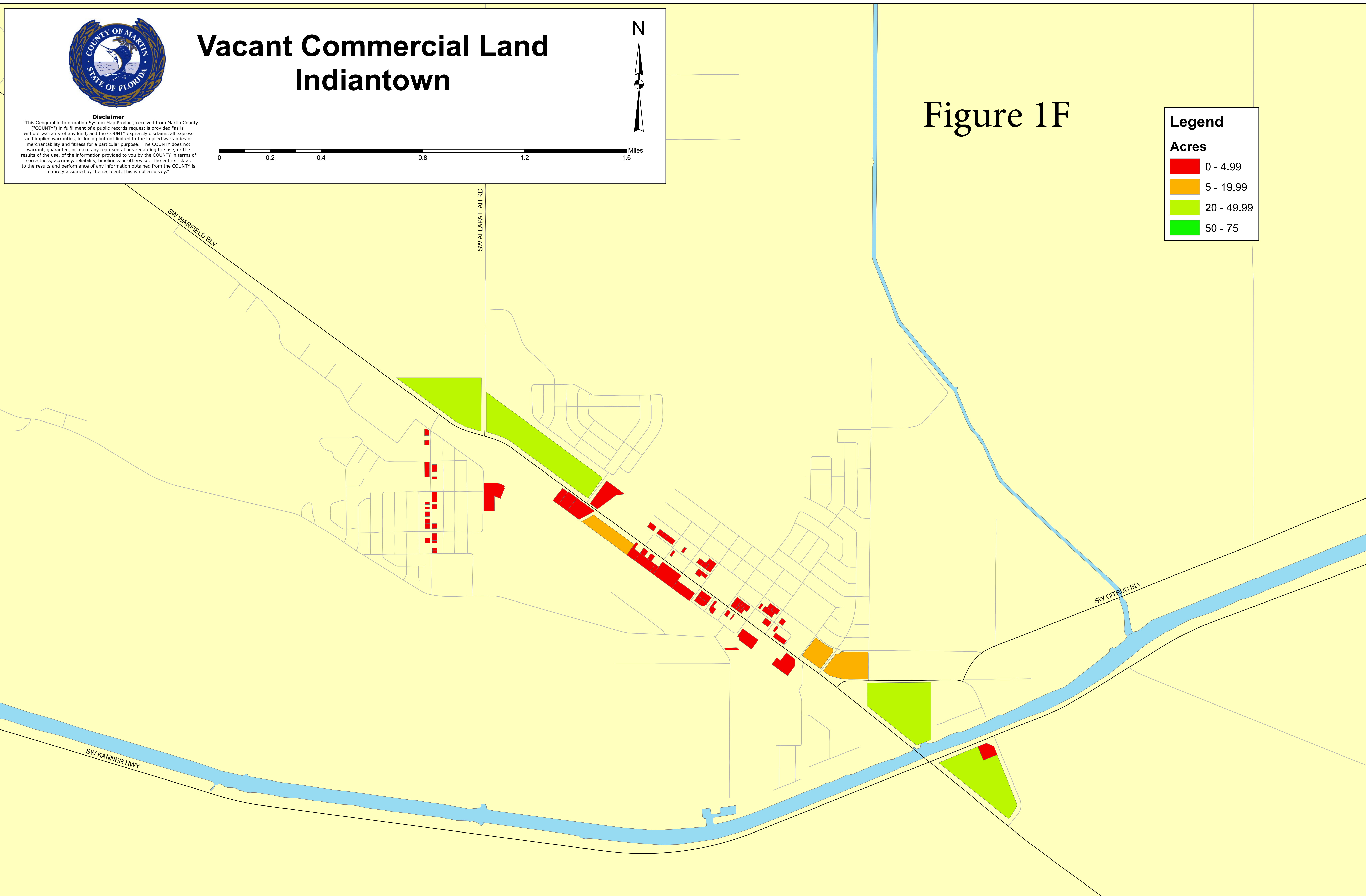


Figure 1F

Legend

Acres

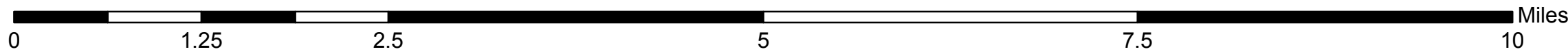
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<div></div>	50 - 75



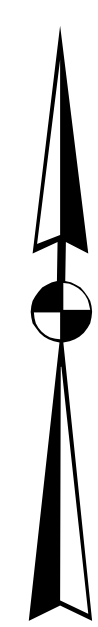


Vacant Industrial Land

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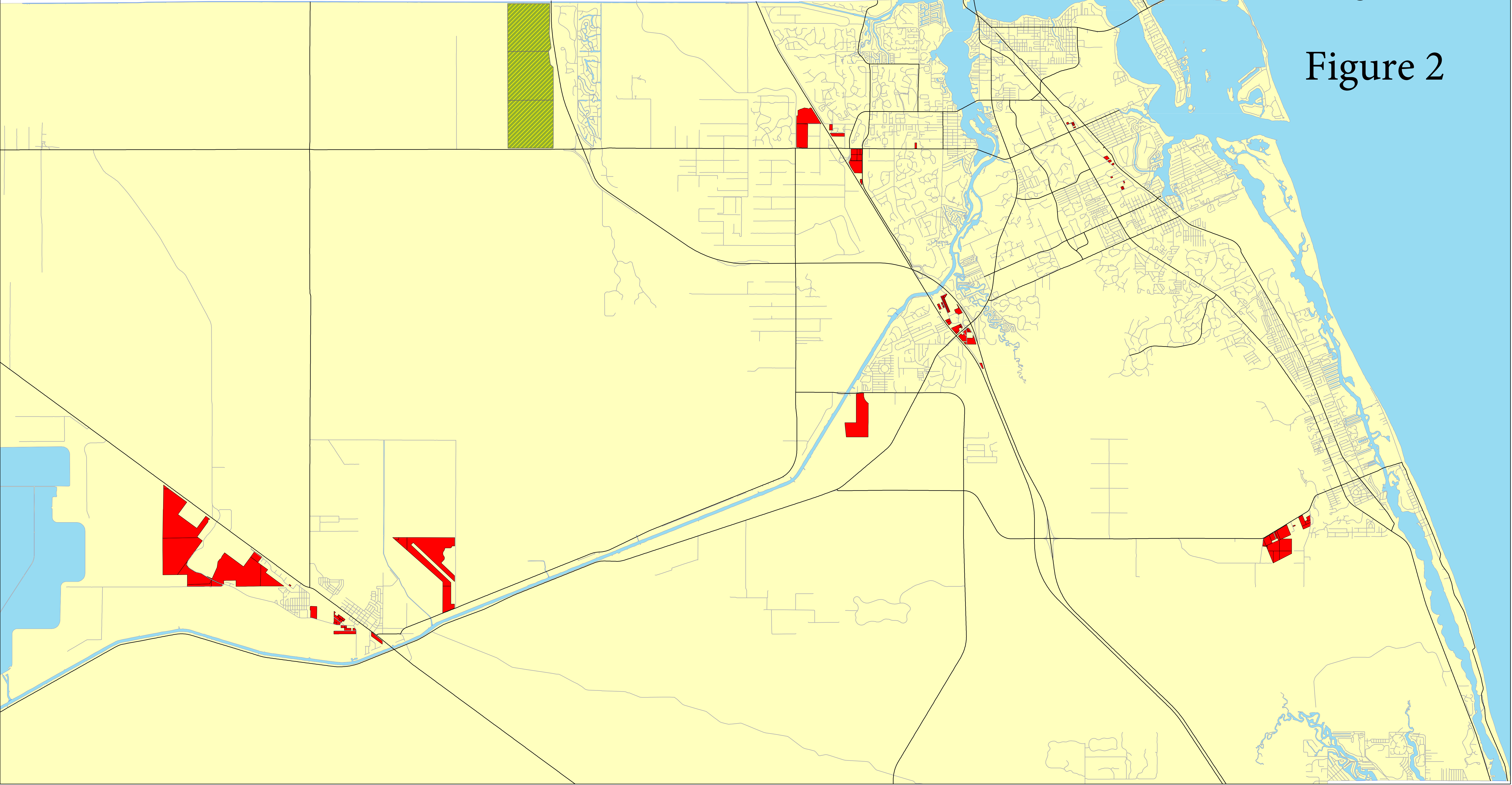


Legend

-  Vacant Industrial Land
-  AgTEC
-  Major Roads
-  Roads

**122 Parcels +
3 AgTEC Parcels**

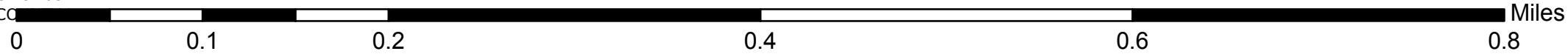
Figure 2





Vacant Industrial Land North

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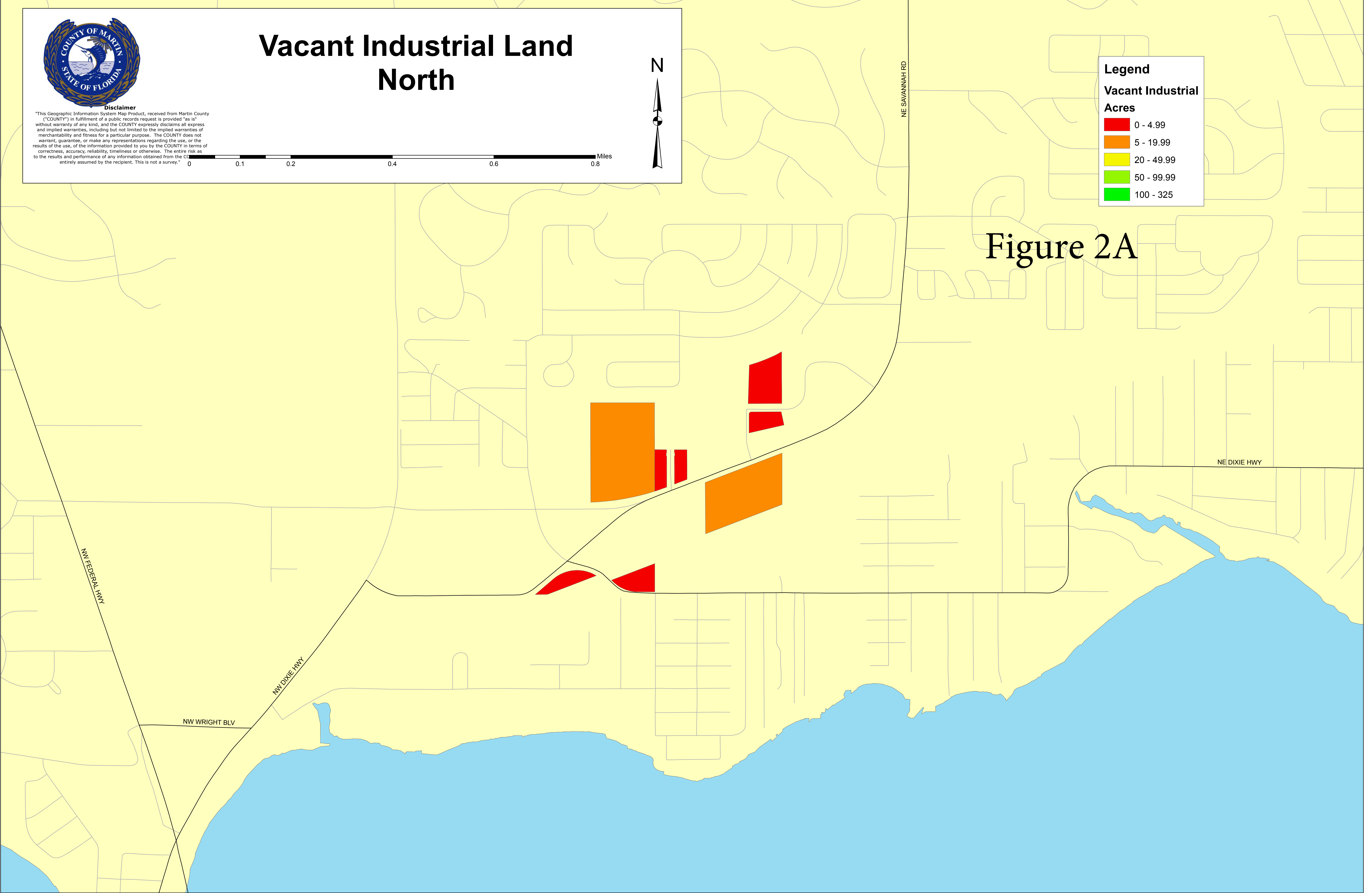


Legend

Vacant Industrial Acres

	0 - 4.99
	5 - 19.99
	20 - 49.99
	50 - 99.99
	100 - 325

Figure 2A





Vacant Industrial Land South

N



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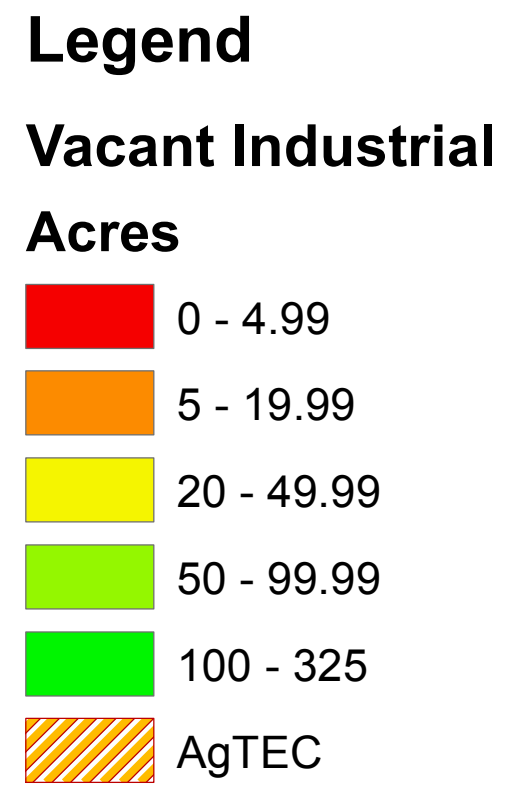
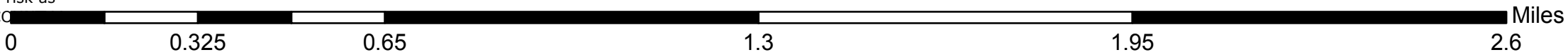


Figure 2B

SE BRIDGE RD

SE DIKE HWY

SE FEDERAL HWY

SE BEACH RD



Vacant Industrial Land Palm City

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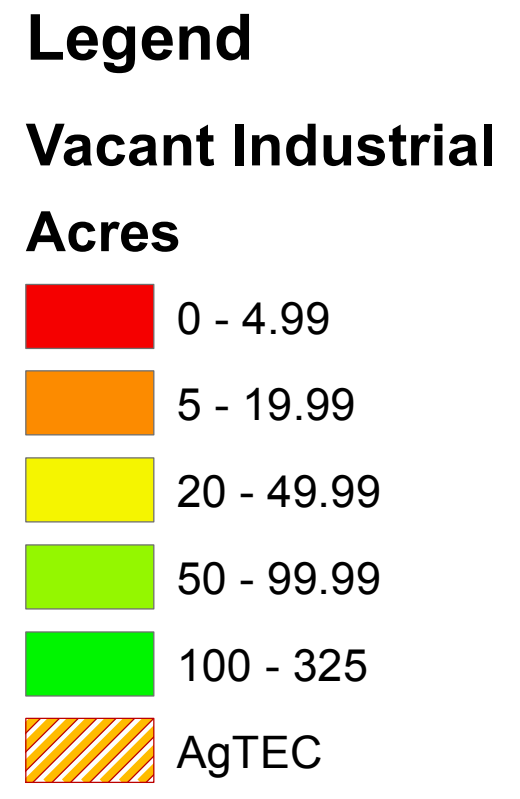
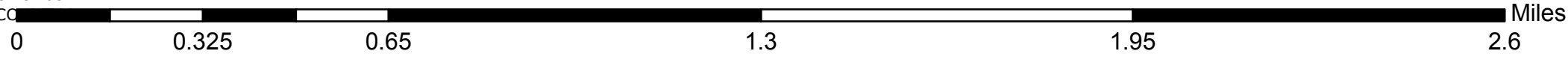
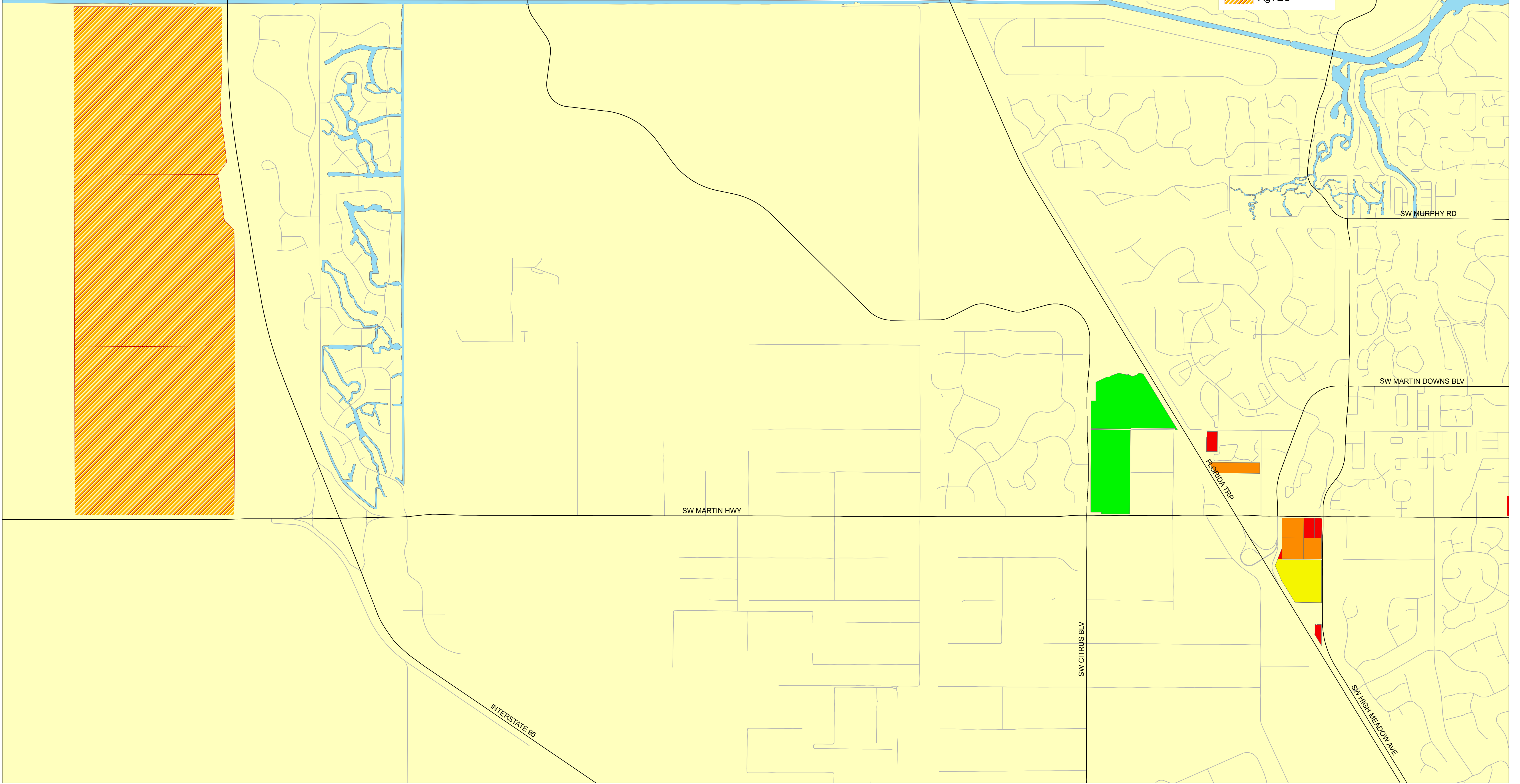


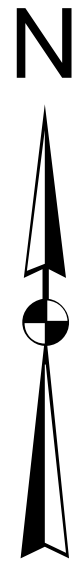
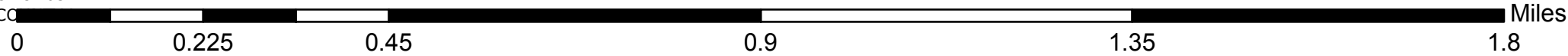
Figure 2C





Vacant Industrial Land Mid-County

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Legend

Vacant Industrial Acres

	0 - 4.99
	5 - 19.99
	20 - 49.99
	50 - 99.99
	100 - 325
	AgTEC

Figure 2D

SW CITRUS BLV

SW 96 TH ST

SW KANNER HWY

SW PRATT-WHITNEY RD

INTERSTATE 95
FLORIDA TRP



Vacant Industrial Land Stuart

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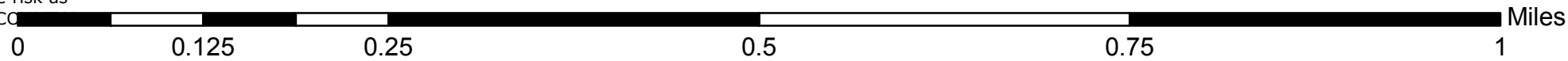
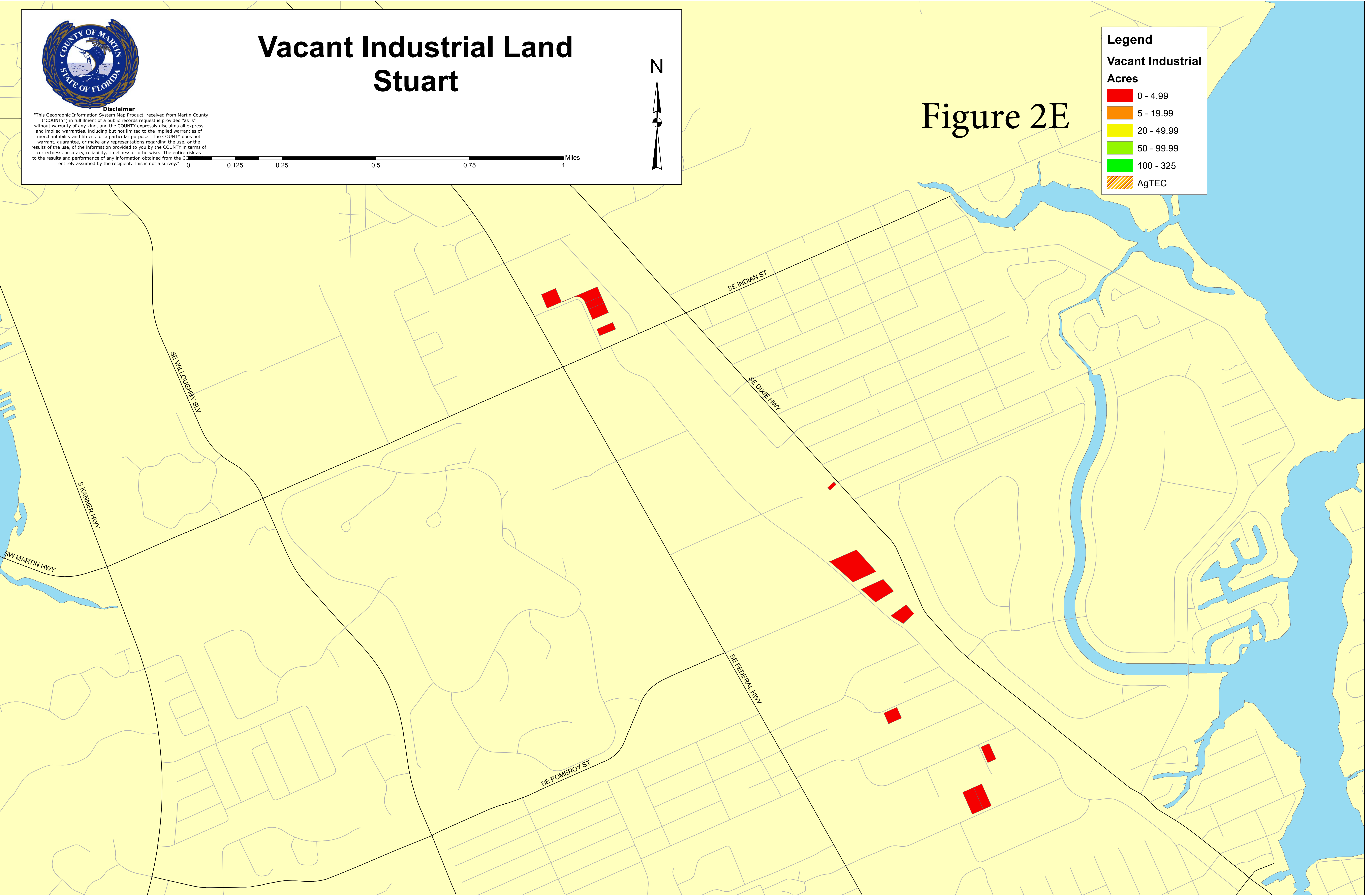


Figure 2E

Legend

Vacant Industrial Acres

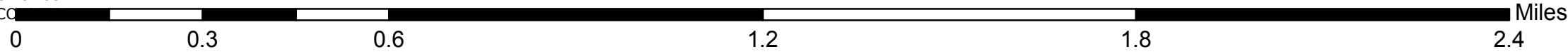
[Red]	0 - 4.99
[Orange]	5 - 19.99
[Yellow]	20 - 49.99
[Light Green]	50 - 99.99
[Green]	100 - 325
[Hatched]	AgTEC





Vacant Industrial Land Indiantown

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SW ALLAPATTAH RD

SW WARFIELD BLV

SW CITRUS BLV

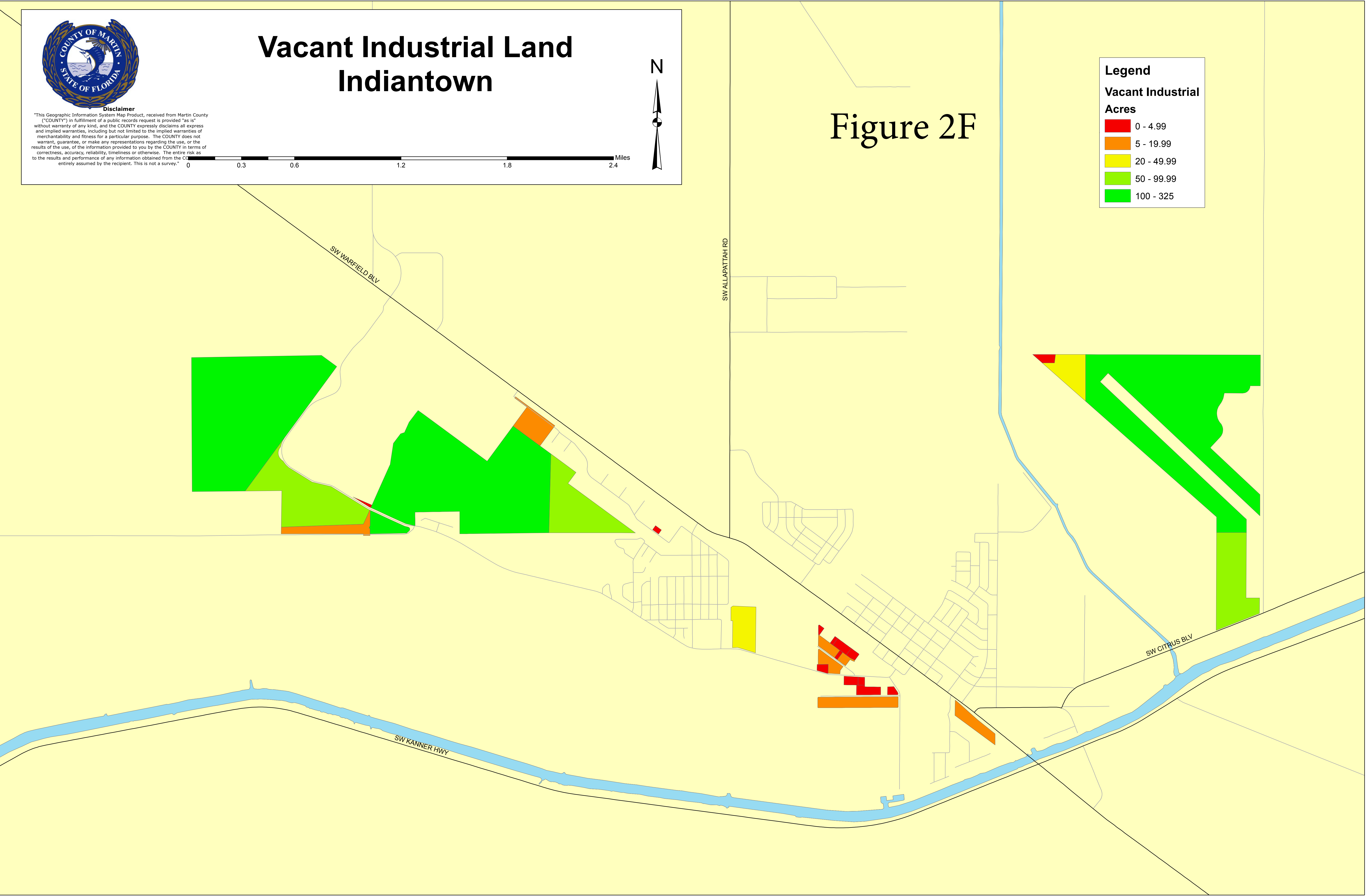
SW KANNER HWY

Figure 2F

Legend

Vacant Industrial Acres

0 - 4.99
5 - 19.99
20 - 49.99
50 - 99.99
100 - 325



APPENDIX I

COMMERCIAL AND INDUSTRIAL REPORT

APPROVED SITE PLANS

Martin County, FL

Approved Site Plans

The following development applications have received site plan approvals from the County. Some are free standing development, while others are subdivisions where active development has or will occur on individually platted lots. All the development applications in the table that follows are considered active.

2016 Commercial/Industrial Inventory

Table 1
Approved Site Plans

MAP #	NAME	ACRES	TYPE	APPROVED SQ.FT./NO. OF LOTS	APPROVAL DATE	EXP. DATE	SPECIAL CONDITIONS OR CONSTRAINTS
1	West Jensen PUD Par.6.1	12.53	Master	63,000 s.f. Limited Industrial	11/18/08	Ph 3 (all remaining parcels) need permitting by 12/30/2017 and completion by 12/30/18	
2	Port Salerno Industrial Park	19.74	Master/ Final	7-lots ¹	11/29/05 Plat appr. 4/25/06	Lots require Final site plan approval.	
3	American Custom Yachts (South Half, boat storage area)	12.67	Ph- 1 Final Ph- 2 Master	Ph 1 -10,000 s.f. Building, 16,500 s.f. uncovered boat storage area and 31,000 s.f. covered boat storage area Ph 2- 18,823 s.f. covered boat storage and 50,000 s.f. Building	1/7/10	Ph 1 must obtain building permits by 1/7/2013 and completed by 1/7/2014 Ph 2- needs Final by 1/7/2015 October 2015, applicant has requested a preapplication meeting to	Prop-Share Agreement (paid)

¹ Four lots available. Three lots have obtained Final Site Plan.

MAP #	NAME	ACRES	TYPE	APPROVED SQ.FT./NO. OF LOTS	APPROVAL DATE	EXP. DATE	SPECIAL CONDITIONS OR CONSTRAINTS
						combine into one plan.	
4	Seven J's North	166.10	Master	42-lots General Industrial	2/3/09	Need 1 st Final by 2/3/2013 and last Final by 5/9/2016	
5	Lake Michigan Marine Facility	38.12	Revised Master/Final	9,200 s.f. Office	5/9/06 Approval pending	Time Ext. Pull Bldg. Permits by 10/12/15 and Complete by 10/12/16	
6	Prism Business Park	19.20	Master/Final	13 – lots General/Light Industrial	5/6/08 Plat approved 8/11/09	Time Ext: Pull Bldg. permits by 5/6/2015 and complete construction by 2/2/2016	
7	Indiantown Commerce Park PUD	97.25	Master/Final	31-lot Commerce & Technology Park	4/3/07	Time Ext. Until April 3, 2017	
8	Venture Park PUD	103.72	Master/Final	22-lots Industrial 2- lots Agricultural Industrial & Ag Ranchette	4/12/11	Time Ext: Pull Bldg. permits by 10/16/15 and Infrastructure by 10/16/16	No water or sewer, except lots 6 – 14, which have an exception for well and septic until such time that Indiantown Company utilities are available.
9	Jensen Beach Professional Center	4.27	Master/Final	Professional Office 25,805 sf & 5,031 sf medical office	2/18/08	Time Ext: Pull Bldg. permits by 2/18/2016 complete project 2/18/17	
10	Floridian Natural Gas Storage	144.64	Master/Final	Warehouse Building/Storage Tanks	5/6/2008	Time Ext: Building permits by 2/2/2015 and 2/2/16 to complete project	

MAP #	NAME	ACRES	TYPE	APPROVED SQ.FT./NO. OF LOTS	APPROVAL DATE	EXP. DATE	SPECIAL CONDITIONS OR CONSTRAINTS
11	Tarmac Ready Mix Concrete Batch plant	4.74	Master/Final	Redi-mix concrete batch facility Industrial	4/21/08	Deadline for 1 st Final 4/21/12 Past due and last Final by 4/21/15	Deadline for 1 st Final past due.
12	Rybovich Boat Works n/k/a Ferreira Marine Way	8.16	Final Targeted Industry	Boat Building Facility Includes 5,900 sf Office 42,800 sf Warehouse	5/18/06	Time Ext. Pull Bldg. permits by 5/18/14 Complete by 5/18/2015	6/17/15 revised final under review
13	Sands Commerce Park PH 3	35.48	Master	(3) Buildings Totaling 459,500 sf	4/3/07	Phase 1 approved 4/3/07 Time Ext. Phase 2 & 3 Final site plan approval no later than 4/3/16. Complete all construction by 4/3/18.	
14	Jensen Beach Chamber of Commerce		Final	2746 s.f. Office	4/24/12	4/24/17	
15	Bridgeview	22.57	Master	99,000 s.f. Office/Commercial (4 buildings)	10/23/12	All final site plan approvals by 10/23/17	
16	Kanner Business Park	9.17 acres	Plat			Timetable May 23, 2017	
17	Martin Enterprise Park	492.26	Major Master	99 Industrial Lots	10/23/12		

Table 2
Seven J's Detail

Lot	Company	Project	Process	Activity
Lot 1	Coating Supply Inc	C139-002	Approved	
Lots 2 & 3		P102-005 P102-015	Approved	
Lot 4	No application			
Lot 5	High Times Crane	P102-012	Approved	
Lot 6&7	Waterblasting Technologies	P102-045		Application under review
Lot 8	VM Iron Works	P102-043	Approved	
Lot 9	Centerline Utilities	P102-041	Approved	
Lot 10	Ferreira Industrial	P102-011	Approved	
Lot 11	Mancil's Tractor Service	P102-038	Approved	
Lot 12	No application	P102-009	Approved	
Lot 13	Volker	P102-046		
Lot 14	Haverty's Furniture	P102-010	Approved	
Lot 15	Redi-Tilt	P102-007 P102-008	Approved	
Lot 16		P102-046		
Lot 17	Scammell Construction	P102-028	Approved	
Lot 18 & 19	Classic Golf International	P102-029	Approved	
Lot 20	Just Keep Going	P102-006	Approved	

 Built

The County's development application process includes Master Site Plan and Final Site Plan options. A Final Site Plan approval is required before construction can occur. All Final Site Plan development orders mandate a timetable of development that requires permits to be obtained within one year of approval and the completion of the development within 2 years of approval. Master Site Plans are optional. They are generally less expensive to obtain and they do not permit construction to occur after approval is granted. The Master Site Plan option is often selected for larger more complex developments and multi-phased projects. Master Site Plan approvals are given a maximum of five years for completion. Within that period all Final Site Plan approvals are required for each of the phases within the development. The County's development review process permits application for Master Site Plans and Final Site Plans to be combined into a single process. This is especially useful for permit-ready industrial projects.