

# Major Employment Center Land Use Study

## Community Session #2

March 20, 2007

# Agenda

- Introduction
  - County Staff
  - Consultant Team
- Project Overview – Progress to Date
- Major Employment Centers
  - Land use overview
  - Market & demand analysis
- Group Discussion
  - Comments on key findings
  - Preliminary strategies
  - Your vision for future MECs in Sarasota County
- Next Steps

## Project Goal:

*“Assess assigned land uses in the current MECs to determine whether they are aligned with the County’s economic development goals and projected employment and economic trends and to provide necessary implementation strategies for this future land use designation.”*

## Project Phases:

**I. Inventory/Profile**

**II. Issues and Opportunities Analysis**

**III. Major Employment Center Analysis**

IV. Vision Statement and Policy Development

V. Implementation and Action Plan

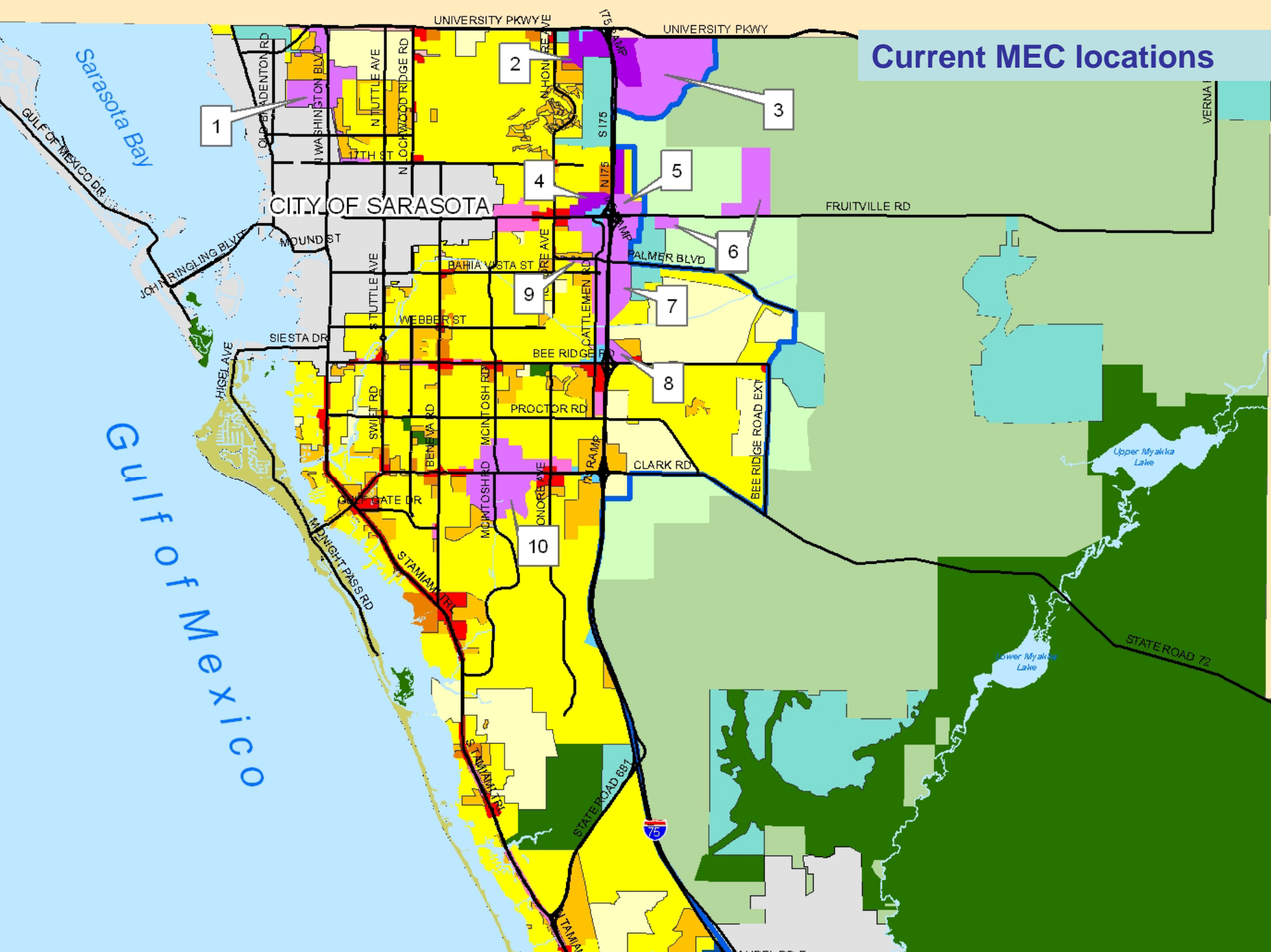
VI. Executive Summary and Final Study

- Work to Date
  - Stakeholder Interviews
  - County Profile
  - Website Development/GIS Mapping
  - Issues and Opportunities
  - MEC core analysis
  - Review session with County
- Follow progress on the website:  
<http://scgov.net/MEC>

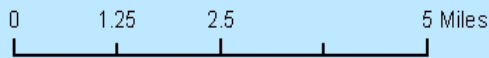
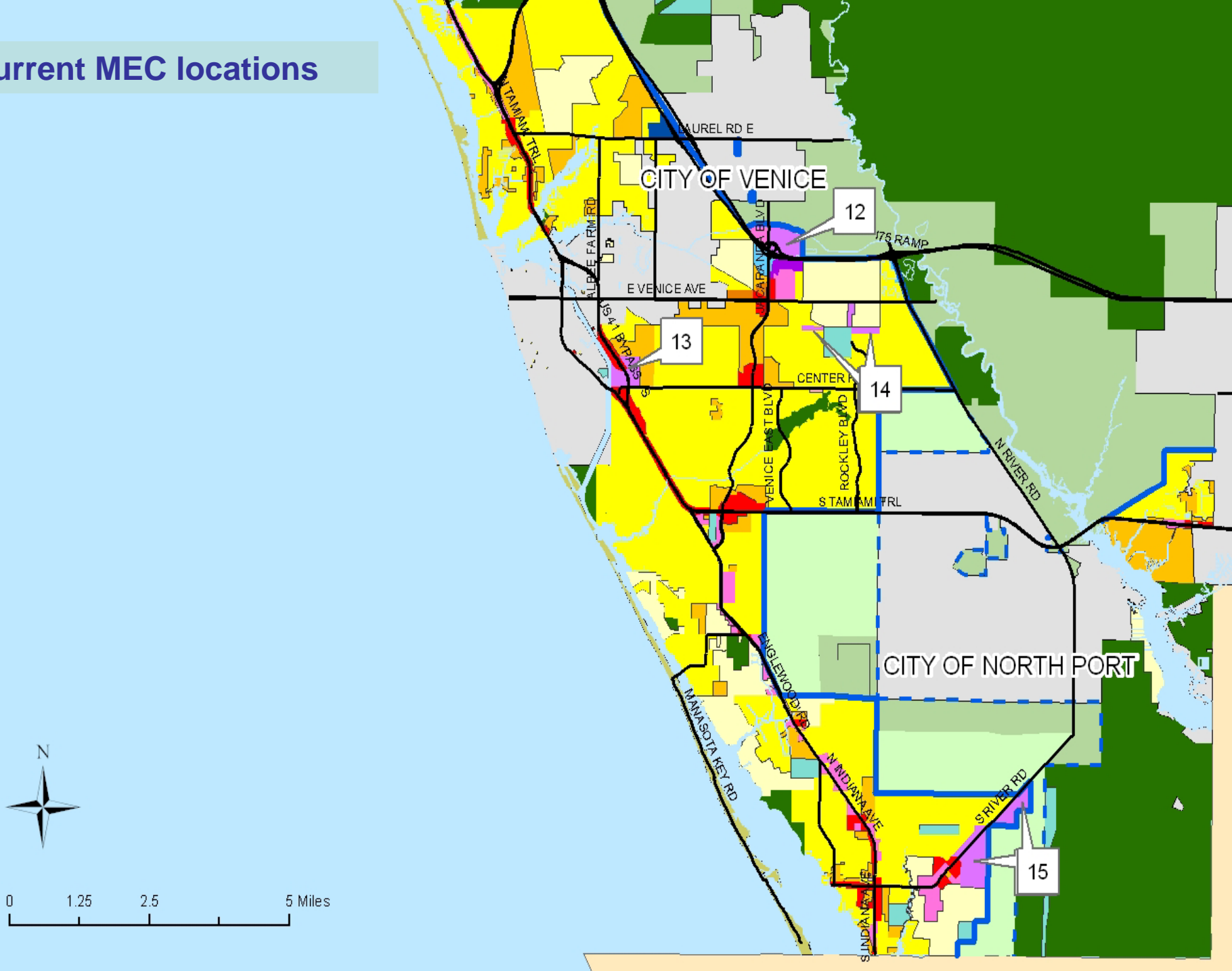
# Major Employment Centers

- What are MECs?
  - Major Employment Centers are planned or existing concentrations of industrial, manufacturing, wholesale, and office employment
  - Large enough to provide separation from surrounding land uses and internal site planning
  - On major transportation routes/accessible to workers
  - Often planned through DRIs

# Current MEC locations



# Current MEC locations



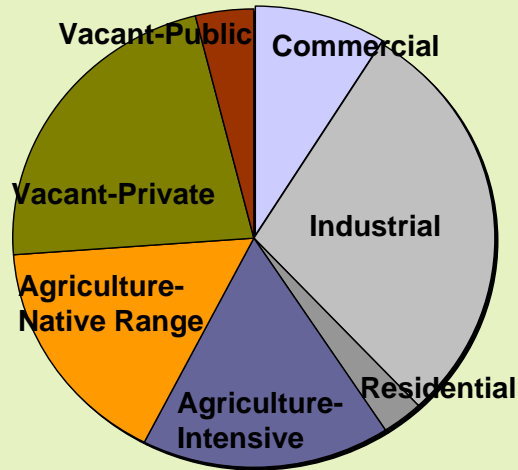
# MEC Analysis

- Understand the *balance* between protecting/sustaining quality-of-life *and* generating economic development (jobs)

- Employment Growth from 1990 to 2006 generated 80,000 new jobs county-wide
- Forecasts suggest an additional 123,000 jobs through 2030
- 392,000 SF of annual demand from new Office employment
  - 40% of employment from office demand at an average of ~200 SF per employee
- 273,500 SF of annual demand from new industrial employment
  - 20% of employment from industrial demand at an average of 475 SF per employee

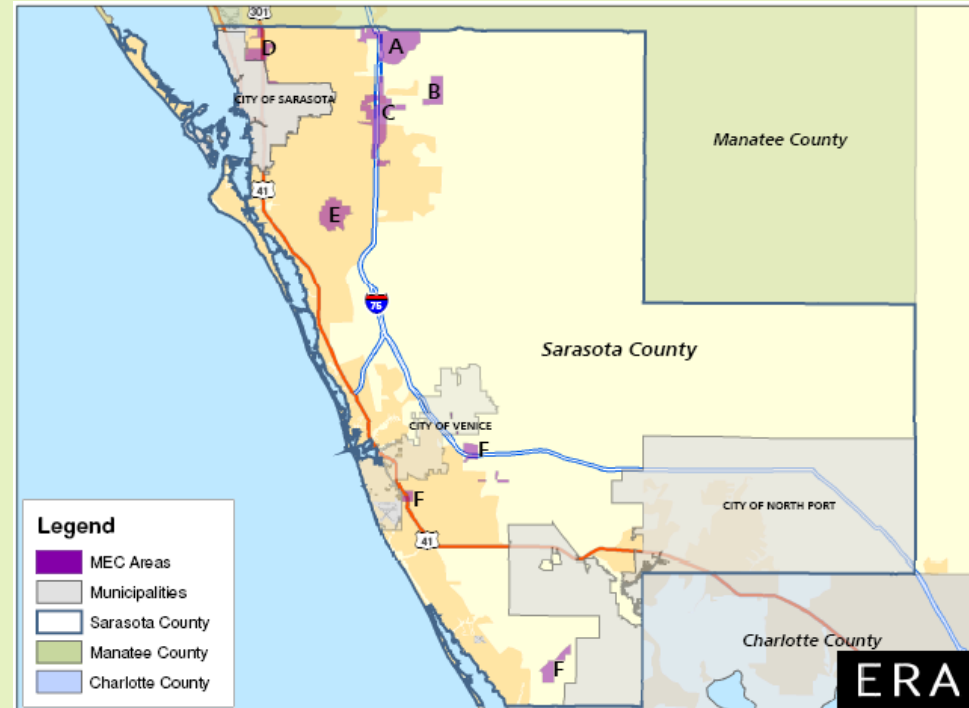
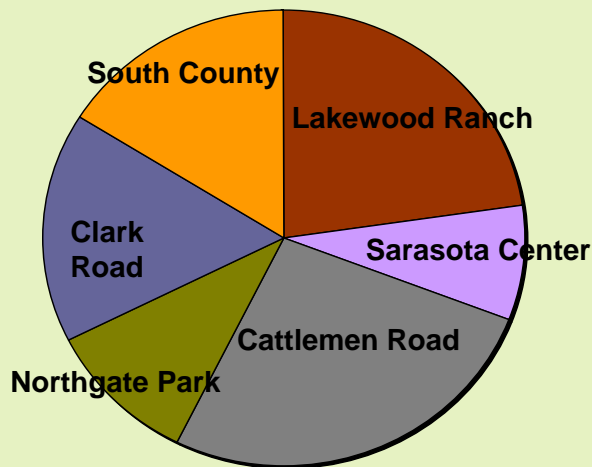
# MEC Summary

**MEC Acreage - by Use**



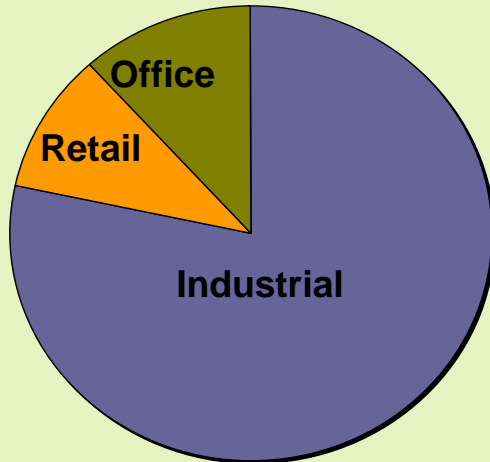
- 15 MECs across Sarasota County, with the highest concentration in North County
- MECs contain 6,300 gross acres
  - 4,400 *net* acres of usable land
    - 2,400 acres of vacant land

**MEC Acreage - by MEC Zone**

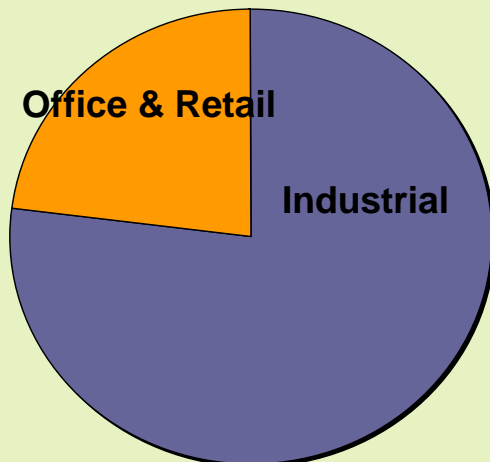


# MEC Summary - Uses

**MEC Commercial Use  
by Square Feet**



**MEC Commercial Use  
by Acres**



- MECs contain 15.6 million SF of “workplace” uses (office, industrial, retail)
- Estimated overall densities are quite *low*
  - 6% floor area ratio (FAR)
- 12.2 million SF of industrial
- 1.6 million SF of office
- 1.8 million SF of retail

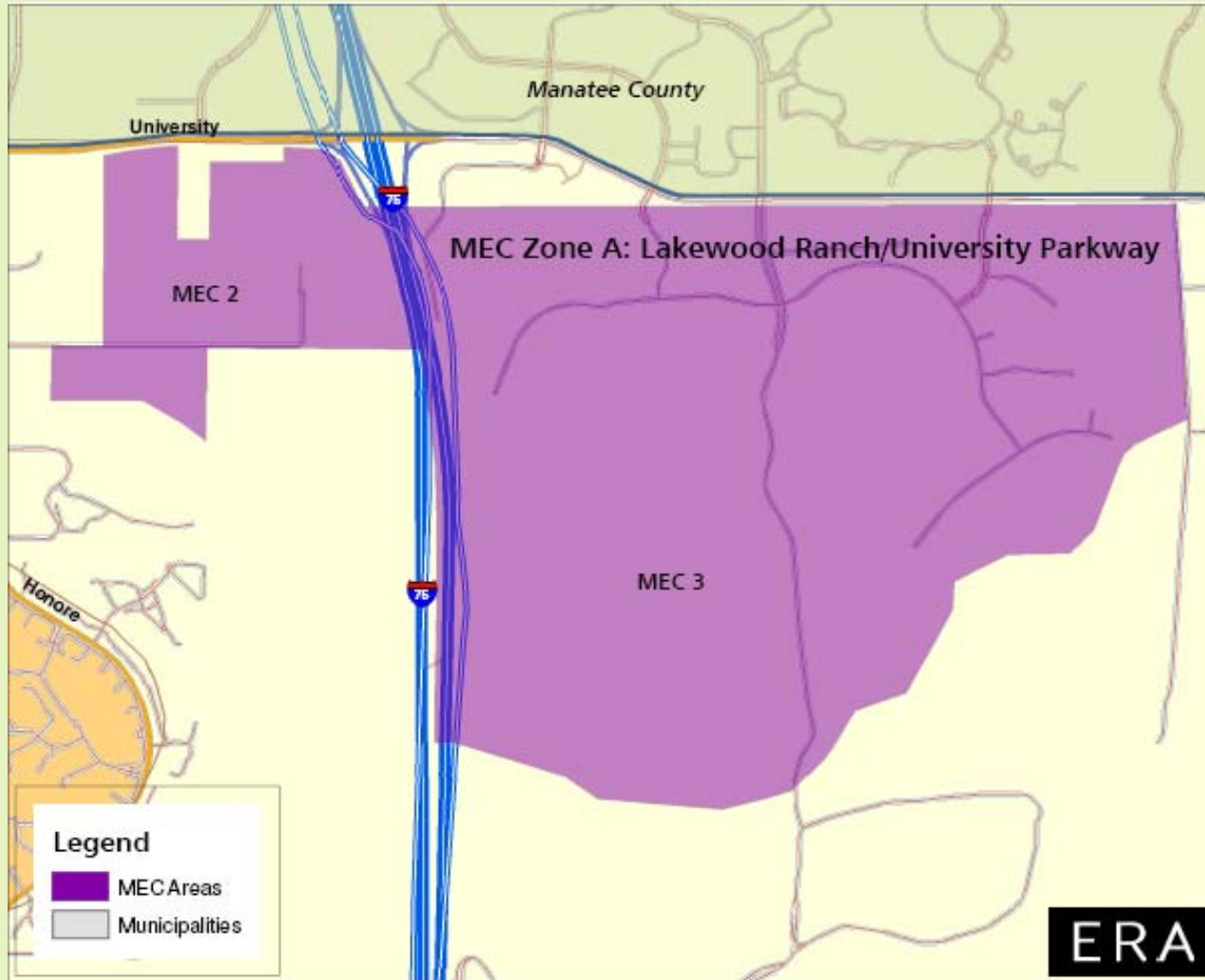
# Development Scenarios

- Scenario 1
  - Develop the available vacant land at current densities
    - Includes all non-public undeveloped land in the MECs (agricultural, native range, and vacant-private)
- Scenario 2
  - Develop vacant land at higher densities (average 30% FAR)
- Scenario 3
  - Redevelop appropriate parcels at higher densities (average 30% FAR)

MEC Zones	Office - Class C or Below (%)	Industrial - Below Class C (%)
MEC A	3.8%	10.0%
MEC B	7.1%	15.0%
MEC C	6.1%	17.8%
MEC D	<b>26.7%</b>	<b>30.2%</b>
MEC E	<b>41.4%</b>	<b>20.3%</b>
MEC F	<b>75.0%</b>	9.7%

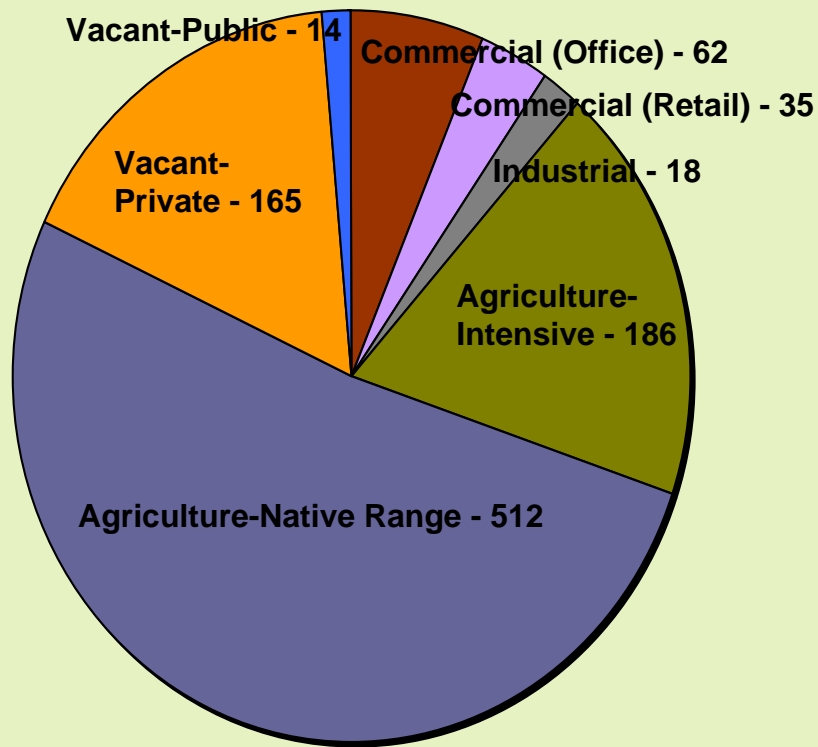
Source: CoStar Property Research; Economics Research Associates, 2007

# MEC Zone A – Lakewood Ranch



# MEC Zone A – Overview

## *MEC Zone A – Lakewood Ranch Acres by Use*



- 1,002 net usable acres
  - 863 undeveloped acres
- Dominated by recent Class A office development

# MEC Zone A – Scenarios

## Market Demand for Office Space (2000-2030)

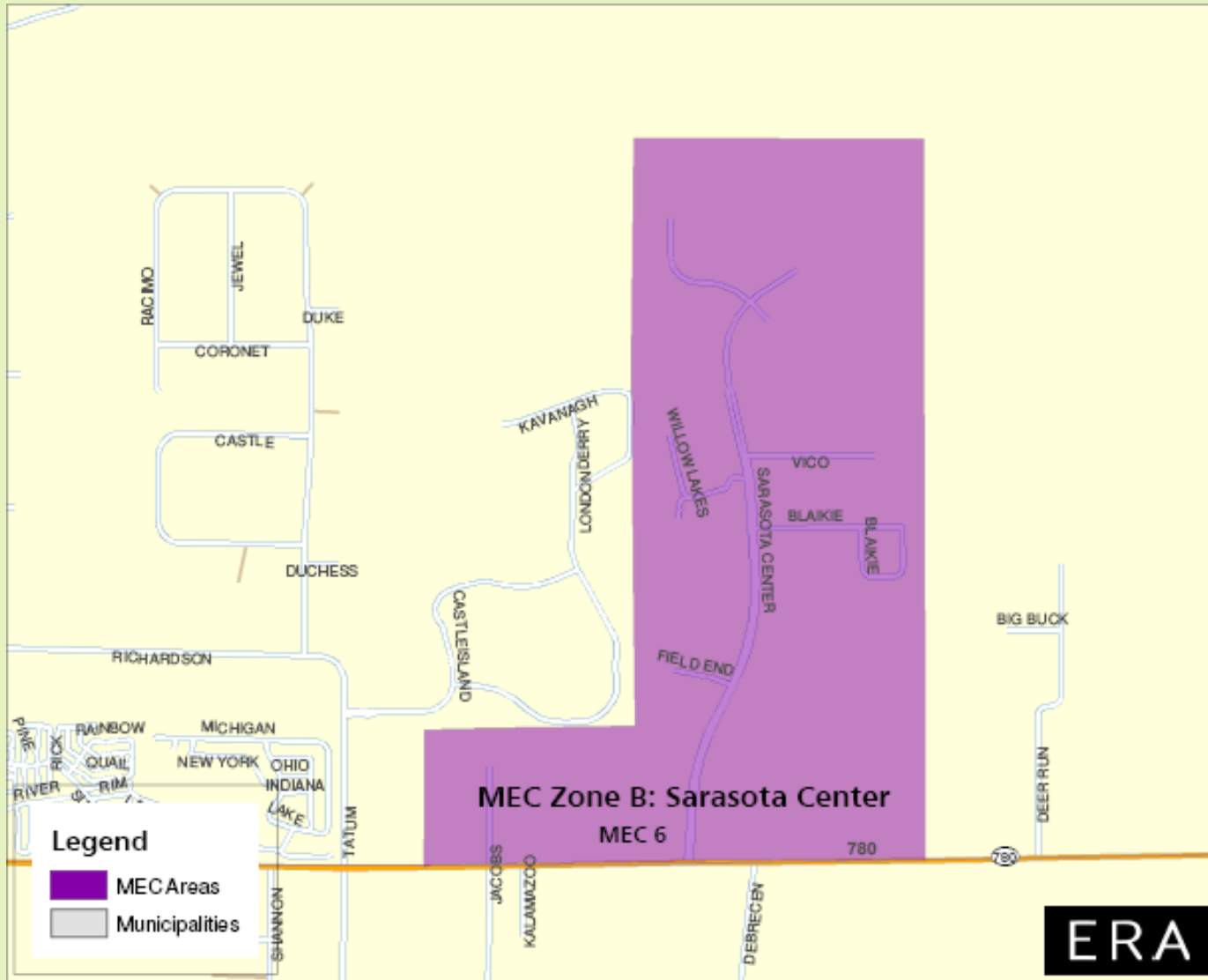
11,760,000 sq. ft.

## Market Demand for Industrial Space (2000-2030)

8,205,000 sq. ft.

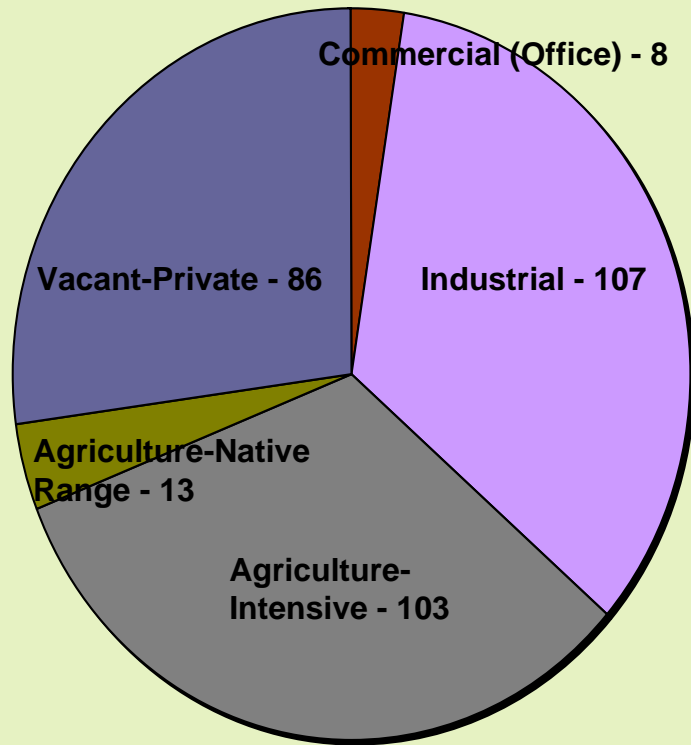
- Scenario 1 - New Development at Current Densities
  - 4,311,000 SF of office (37% of demand)
  - 755,000 SF of industrial (9% of demand)
- Scenario 2 - New Development at Higher Densities
  - 8,623,000 SF of office (73% of demand)
  - 2,537,000 SF of industrial (31% of demand)
- Scenario 3 - Redevelopment
  - 15,000 SF of office (<1% of demand)
  - 17,000 SF of industrial (<1% of demand)

# MEC Zone B – Sarasota Center



# MEC Zone B – Overview

*MEC Zone B – Sarasota Center  
Acres by Use*



- 352 net acres of land
  - 202 undeveloped acres
- Aging industrial park
  - 843,000 SF of light industrial and small distribution operations
- East of the Urban Services Boundary

# MEC Zone B – Scenarios

## Market Demand for Office Space (2000-2030)

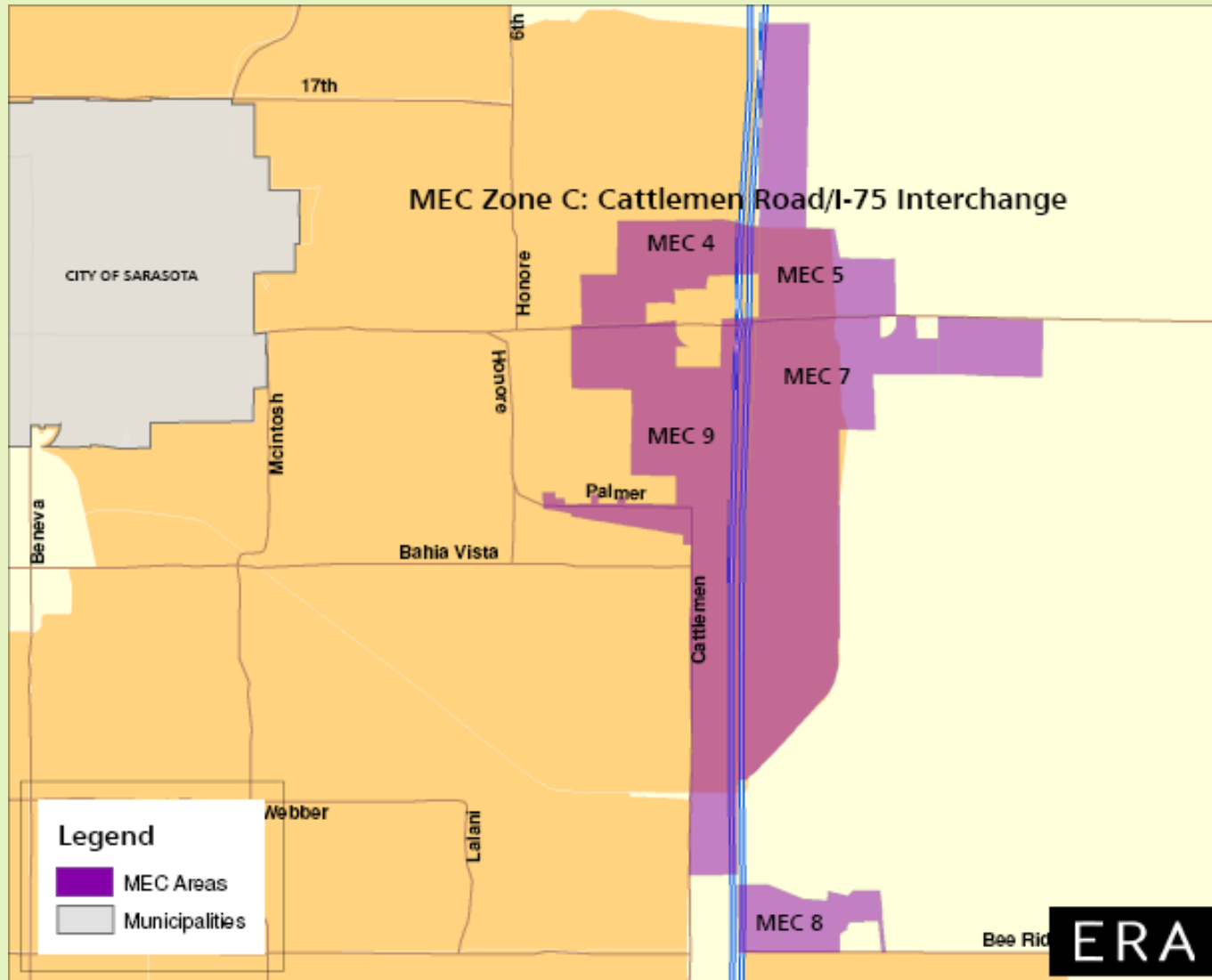
11,760,000 sq. ft.

## Market Demand for Industrial Space (2000-2030)

8,205,000 sq. ft.

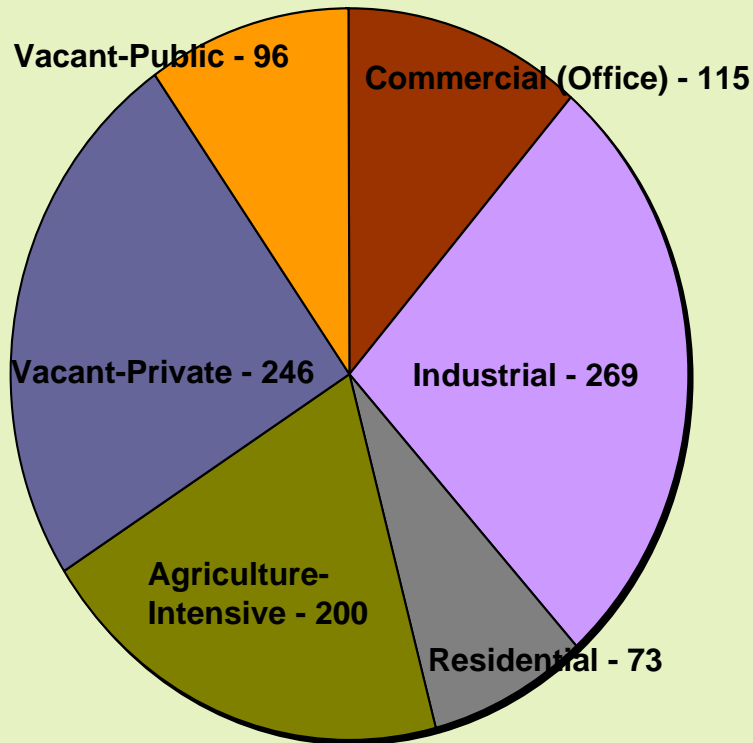
- Scenario 1 - New Development at Current Densities
  - 362,000 SF of office (3% of demand)
  - 1,481,000 SF of industrial (18% of demand)
- Scenario 2 - New Development at Higher Densities
  - 612,000 SF of office (5% of demand)
  - 2,456,000 SF of industrial (30% of demand)
- Scenario 3 - Redevelopment
  - 10,000 SF of office (<1% of demand)
  - 84,000 SF of industrial (1% of demand)

# MEC Zone C – Cattlemen Rd



# MEC Zone C – Overview

## MEC Zone C – Cattlemen Road / I-75 Acres by Use



- 1,157 net acres of land
  - 446 undeveloped acres
- Has largest amount of office and retail space
- Preponderance of Class A and B office buildings
- Aging industrial area where opportunities for redevelopment should be explored
- Frontage/Visibility on I-75 increases value

# MEC Zone C – Scenarios

## Market Demand for Office Space (2000-2030)

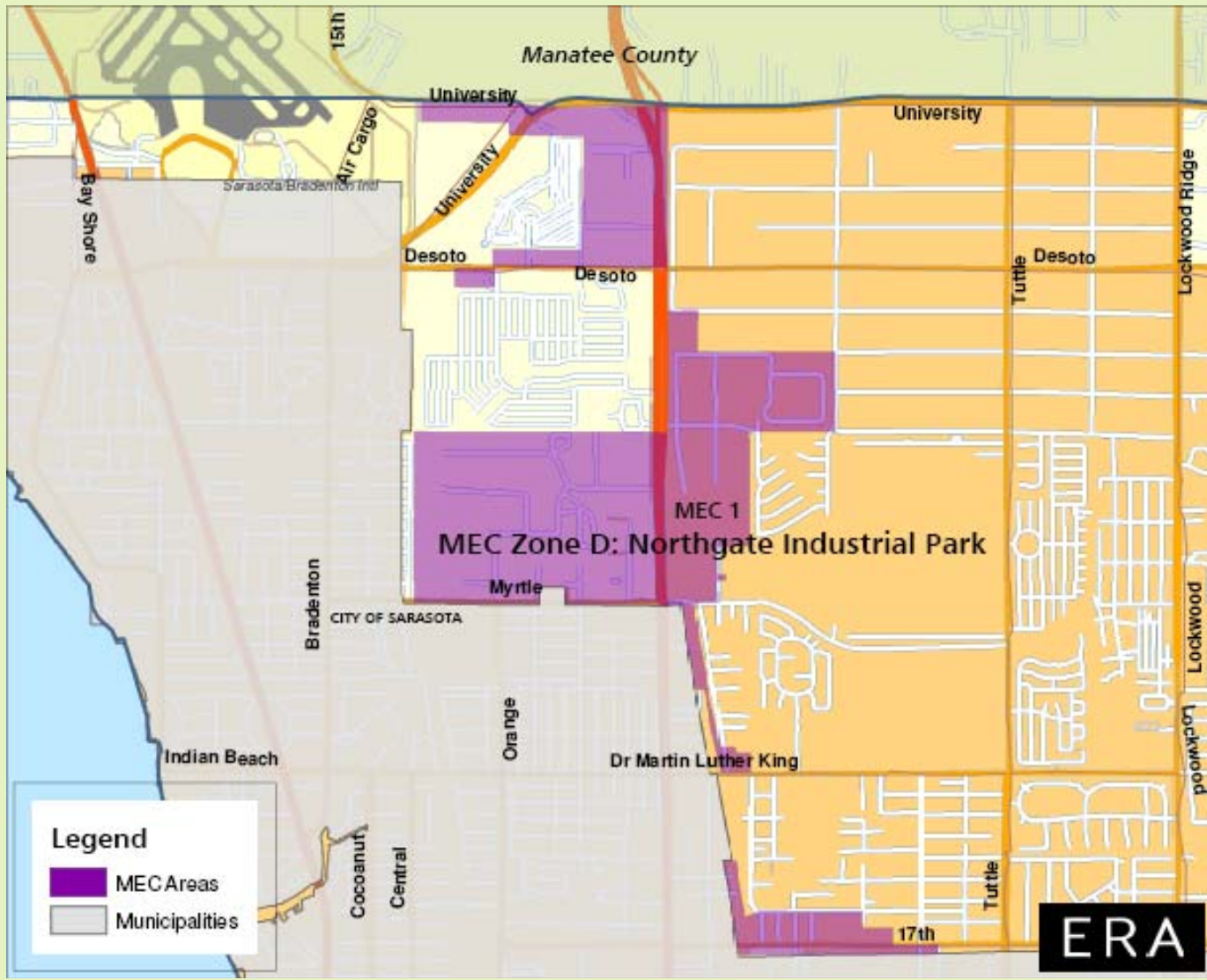
11,760,000 sq. ft.

## Market Demand for Industrial Space (2000-2030)

8,205,000 sq. ft.

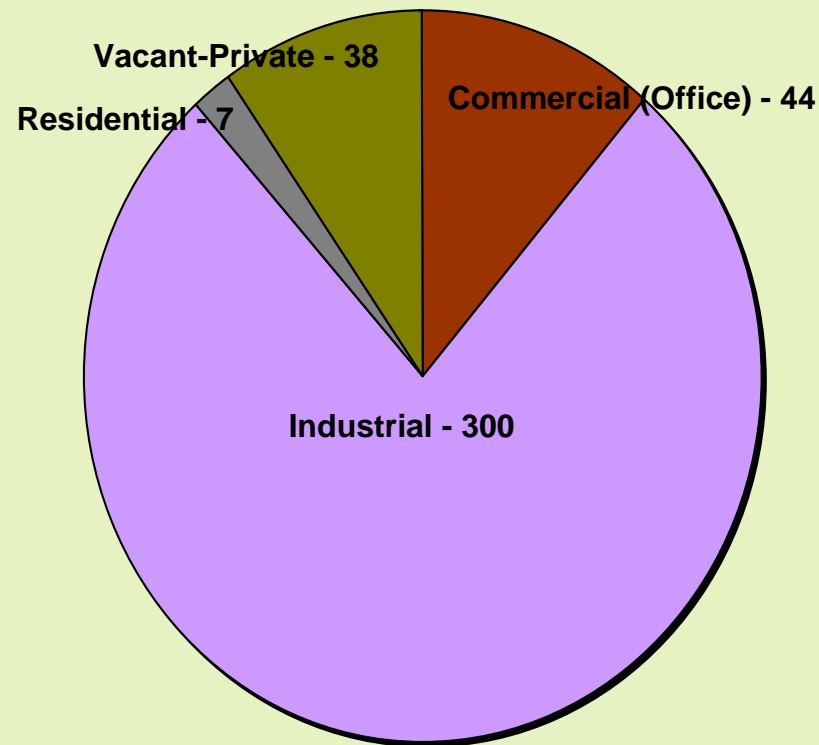
- Scenario 1 - New Development at Current Densities
  - 1,105,000 SF of office (9% of demand)
  - 3,336,000 SF of industrial (41% of demand)
- Scenario 2 - New Development at Higher Densities
  - 2,210,000 SF of office (19% of demand)
  - 4,083,000 SF of industrial (50% of demand)
- Scenario 3 - Redevelopment
  - 57,000 SF of office (<1% of demand)
  - 114,000 SF of industrial (1% of demand)

# MEC Zone D – Northgate



# MEC Zone D – Overview

## MEC Zone D – Route 301 / Northgate Acres by Use



- 447 net acres of land
  - 38 undeveloped acres
- Smallest amount of office space
- *Very* low office densities (3% FAR)—do *not* reflect highest & best use
- Aging industrial zone
- Average building footprint of only 5,000 SF
- Airport proximity enhances warehousing & distribution functions

# MEC Zone D - Scenarios

## Market Demand for Office Space (2000-2030)

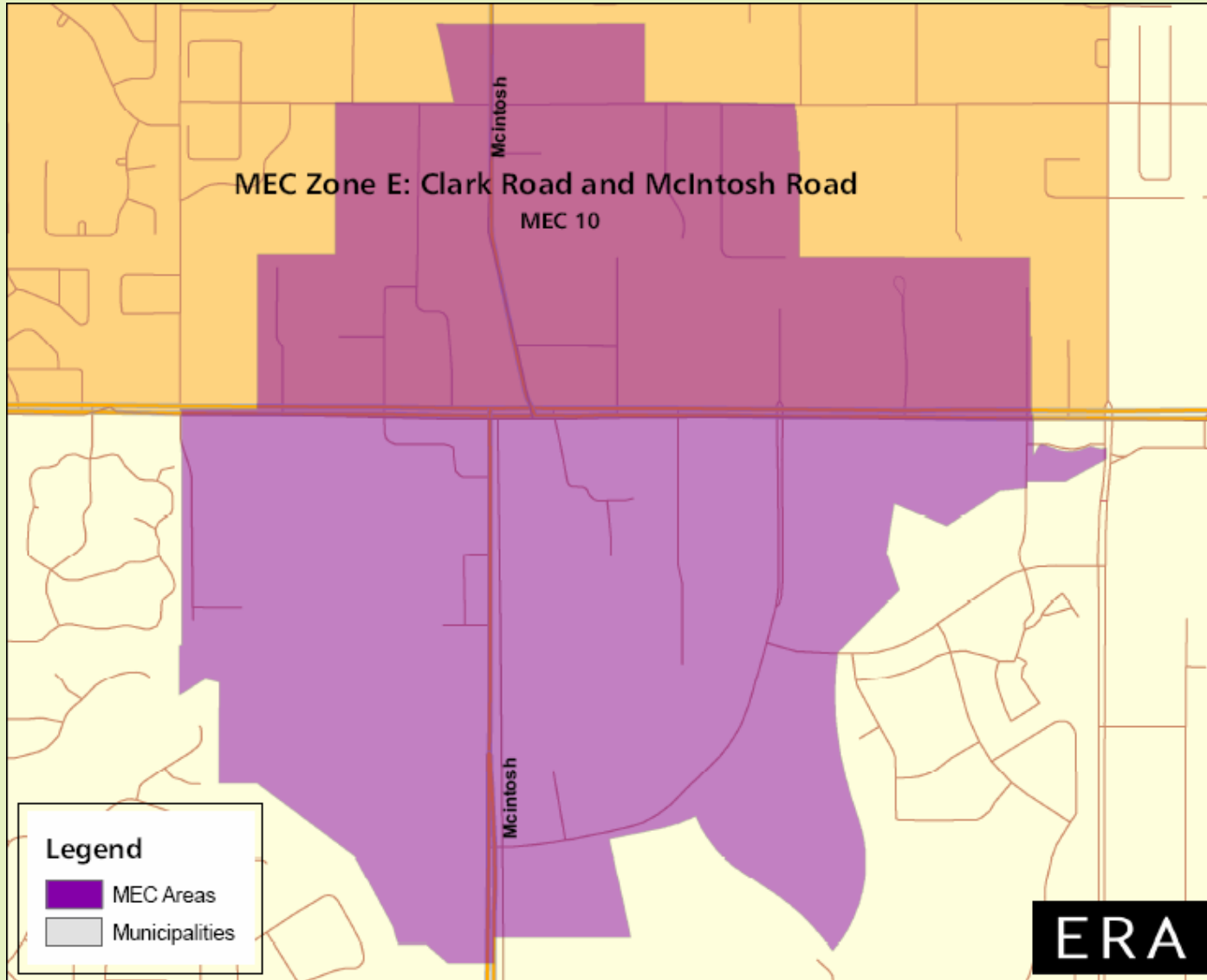
11,760,000 sq. ft.

## Market Demand for Industrial Space (2000-2030)

8,205,000 sq. ft.

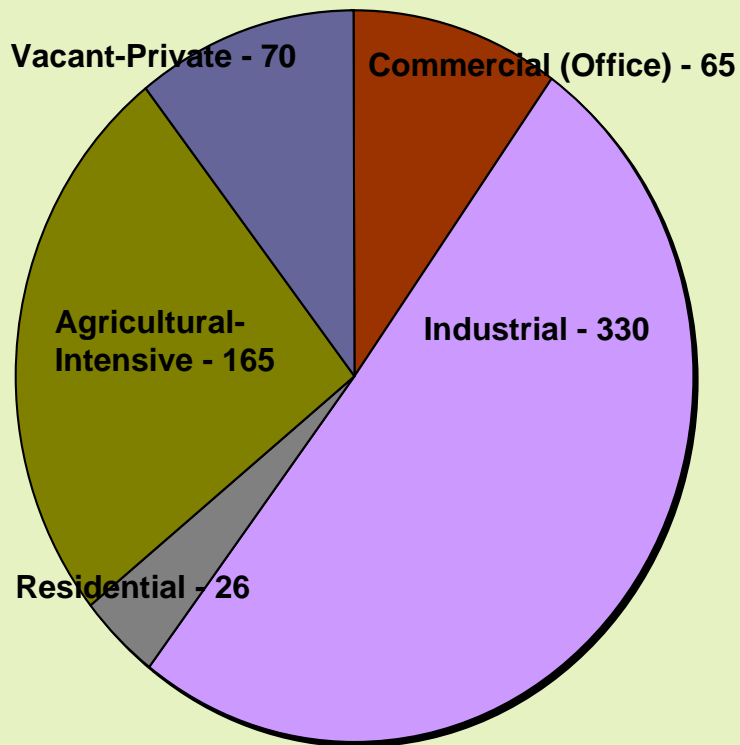
- Scenario 1 - New Development at Current Densities
  - 7,000 SF of office (<1% of demand)
  - 364,000 SF of industrial (4% of demand)
- Scenario 2 - New Development at Higher Densities
  - 64,000 SF of office (1% of demand)
  - 433,000 SF of industrial (5% of demand)
- Scenario 3 - Redevelopment
  - 137,000 SF of office (1% of demand)
  - 190,000 SF of industrial (2% of demand)

# MEC Zone E – Clark Rd



# MEC Zone E – Overview

**MEC Zone E – Clark Road  
Acres by Use**



- 722 net acres of land
  - 235 undeveloped acres
- Largest amount of industrial space
  - 4,000,000 SF
- *Very* low office densities (7% FAR)
- *Negative* absorption
  - Departures such as Winn-Dixie resulted in over 1M SF of lost space in '05
- Redevelopment opportunities of aging, obsolete properties appear strong

# MEC Zone E – Scenarios

## Market Demand for Office Space (2000-2030)

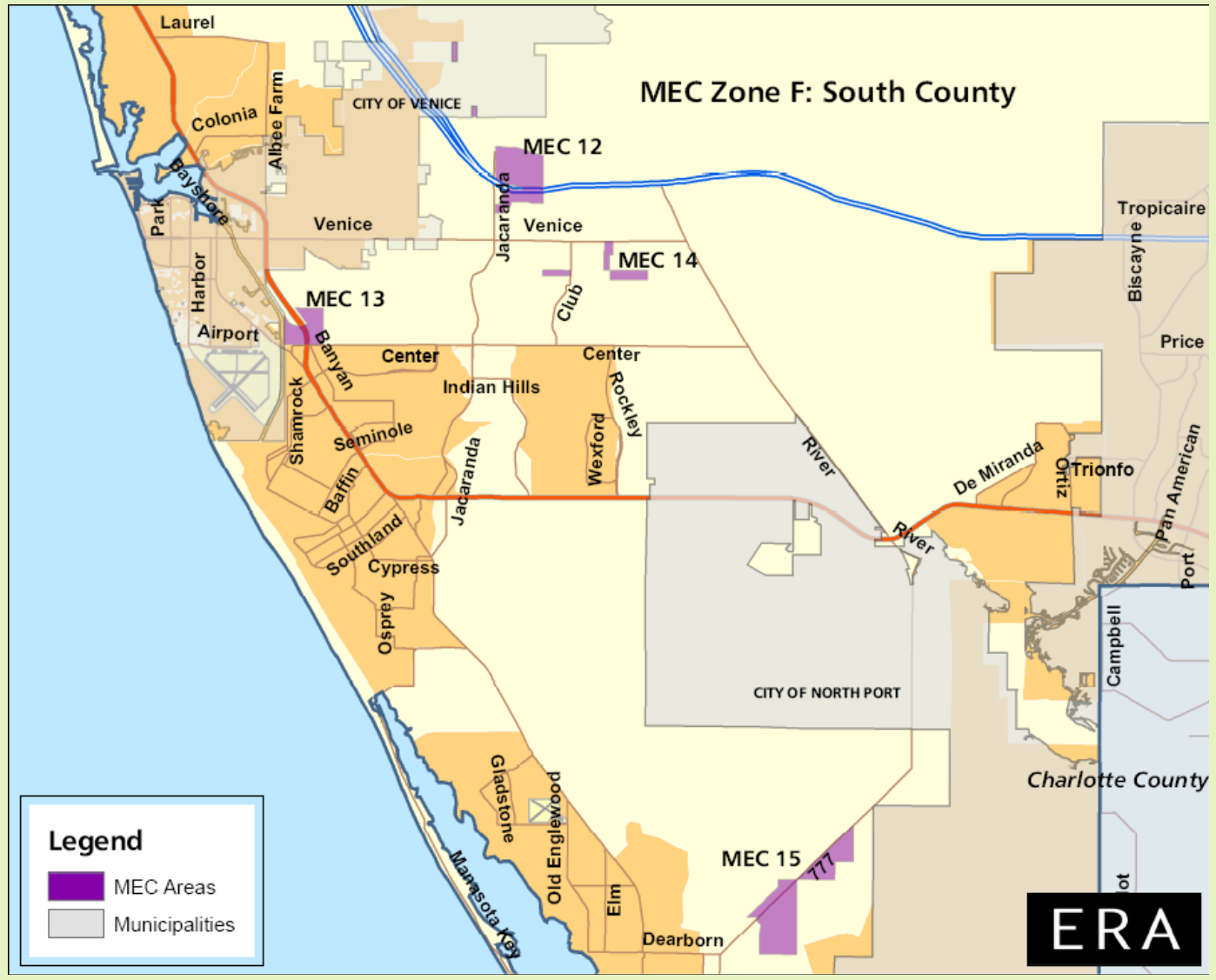
11,760,000 sq. ft.

## Market Demand for Industrial Space (2000-2030)

8,205,000 sq. ft.

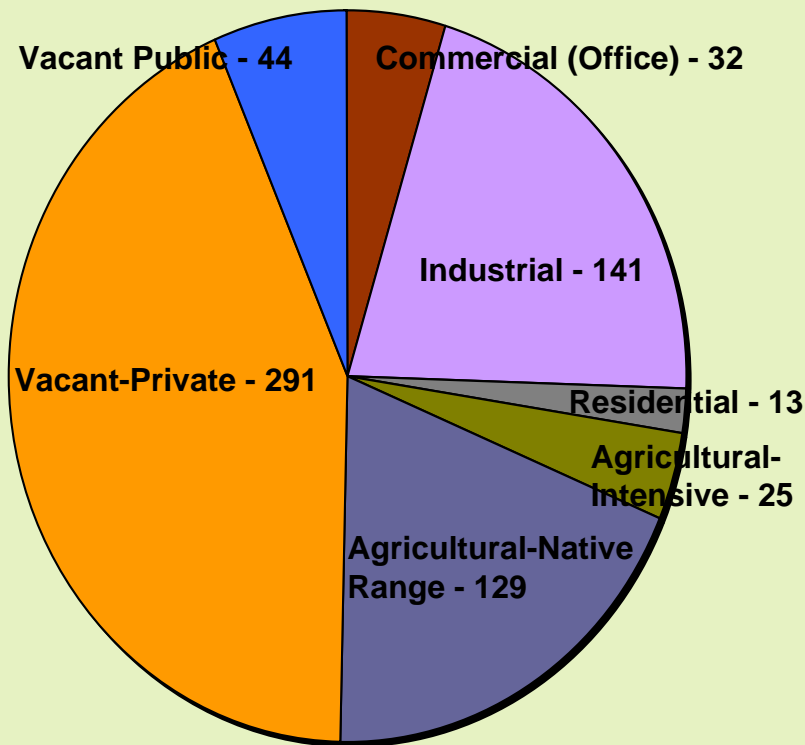
- Scenario 1 - New Development at Current Densities
  - 118,000 SF of office (1% of demand)
  - 2,382,000 SF of industrial (29% of demand)
- Scenario 2 - New Development at Higher Densities
  - 505,000 SF of office (4% of demand)
  - 2,566,000 SF of industrial (31% of demand)
- Scenario 3 - Redevelopment
  - 269,000 SF of office (2% of demand)
  - 62,000 SF of industrial (1% of demand)

# MEC Zone F – South County



# MEC Zone F – Overview

**MEC Zone F – South County  
Acres by Use**



- 702 net acres of land
  - 445 undeveloped acres
- *Low densities*
  - Office 8% FAR
  - Industrial 20% FAR
- Demand for office-related uses in the South County should strengthen as the area's population expands
- Logical location for MEC expansion

# MEC Zone F – Scenarios

## Market Demand for Office Space (2000-2030)

11,760,000 sq. ft.

## Market Demand for Industrial Space (2000-2030)

8,205,000 sq. ft.

- Scenario 1 - New Development at Current Densities
  - 272,000 SF of office (2% of demand)
  - 3,115,000 SF of industrial (38% of demand)
- Scenario 2 - New Development at Higher Densities
  - 1,076,000 SF of office (9% of demand)
  - 4,740,000 SF of industrial (58% of demand)
- Scenario 3 - Redevelopment
  - 235,000 SF of office (2% of demand)
  - 61,000 SF of industrial (1% of demand)

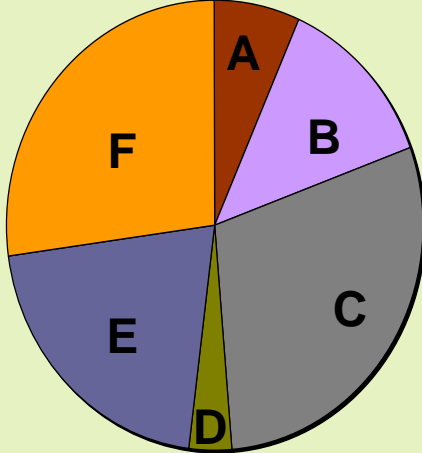
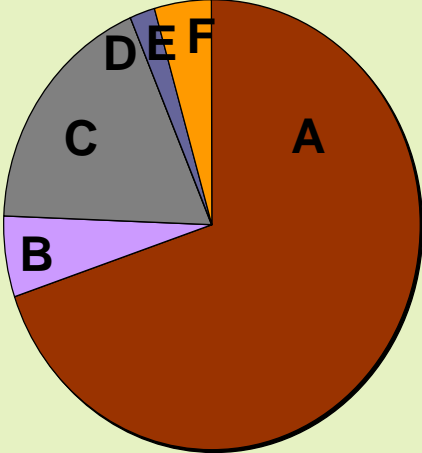
# Scenario 1 - Summary

<b>Market demand for office space (2000-2030)</b>
11,760,000 SF
<b>Office space accommodated by Scenario 1</b>
6,175,000 SF
<b>Additional space required to accommodate growth</b>
<b>5,585,000 SF</b>

<b>Market demand for industrial space (2000-2030)</b>
8,205,000 SF
<b>Industrial space accommodated by Scenario 1</b>
11,433,000 SF
<b>Additional space required to accommodate growth</b>
<b>(3,228,000) SF</b>

*Where can growth be accommodated?*

*Where can growth be accommodated?*



<b>Total additional demand for space</b>
2,357,000 SF @ .15 FAR
<b>361 Acres</b>

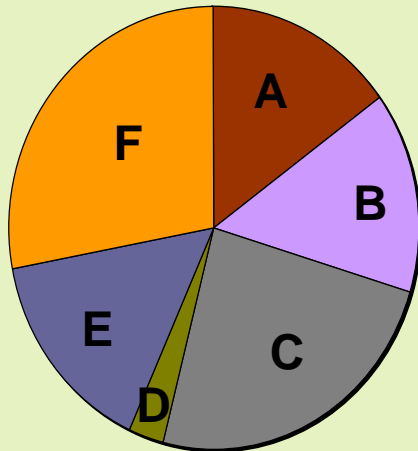
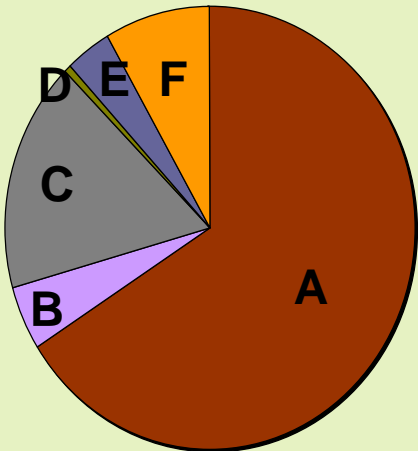
# Scenario 2 - Summary

<b>Market Demand for office space (2000-2030)</b>
11,760,000 SF
<b>Office space accommodated by Scenario 2</b>
13,090,000 SF
<b>Additional space required to accommodate growth</b>
<b><i>(1,330,000) SF</i></b>

<b>Market demand for industrial space (2000-2030)</b>
8,205,000 SF
<b>Industrial space accommodated by Scenario 2</b>
16,815,000 SF
<b>Additional space required to accommodate growth</b>
<b><i>(8,610,000) SF</i></b>

*Where can growth be accommodated?*

*Where can growth be accommodated?*



<b>Total Additional Demand for space</b>
(9,940,000) SF @ .30 FAR
<b><i>0 Acres</i></b>

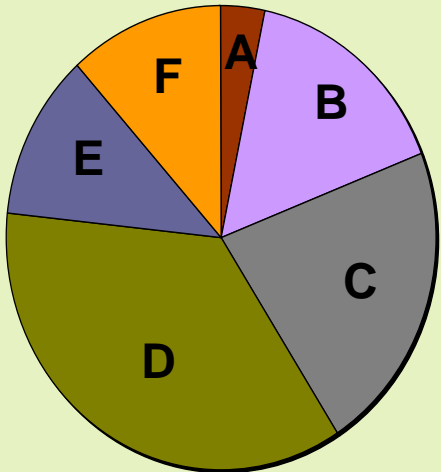
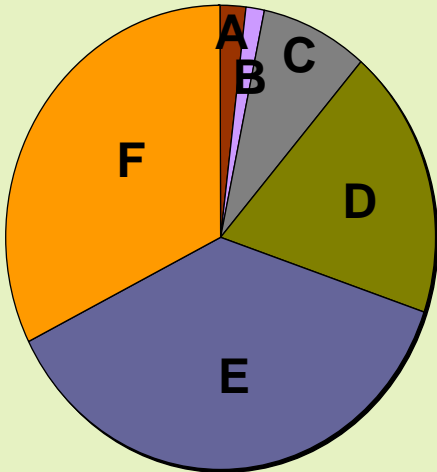
# Scenario 3 - Summary

<b>Market Demand for office space (2000-2030)</b>
11,760,000 SF
<b>Office space accommodated by Scenario 3</b>
723,000 SF
<b>Additional space required to accommodate growth</b>
<b>11,037,000 SF</b>

<b>Market Demand for industrial space (2000-2030)</b>
8,205,000 SF
<b>Industrial space accommodated by Scenario 3</b>
528,000 SF
<b>Additional space required to accommodate growth</b>
<b>7,677,000 SF</b>

*Where can growth be accommodated?*

*Where can growth be accommodated?*



<b>Total additional demand for space*</b>
18,714,000SF @ .30 FAR
<b>1,432 Acres</b>

*\*(does not include development of vacant land, only redevelopment of some existing parcels)*

## Preliminary Strategies – Countywide

- Option: using existing designated agricultural land within the current MEC would accommodate the real estate demand for future employment growth
- Focus on redevelopment of MECs Cattleman Road (as a priority), Sarasota Center, and Northgate
- Develop specific tools to promote redevelopment in MECs to include no or low interests loans or grants from the County for facility and/or equipment upgrades
- South County strategy includes identifying the location of a new MEC and the potential expansion of MEC 12

## Preliminary Strategies for MEC Zone A

- Continue to promote the focus of Lakewood Ranch as premiere Class A office location
- Target Lakewood Ranch as location for corporate/business recruitment
- Promote higher FARs (floor area ratio) to make efficient use of this land
- Explore the potential role for the County to subsidize structure parking (long-term strategy)
- Ensure a balance between Lakewood Ranch development and South County MECs – to mitigate/reduce traffic congestion on I-75. Special incentives for South County

## Preliminary Strategies for MEC Zone B

- Prime redevelopment location – due to aging industrial stock
- Identify opportunities to Strategy 1 assist in the redevelopment of existing light industrial uses:
  - Construction costs write downs through no/low interest loans or grants
  - Funding upgrades on equipment

## Preliminary Strategies for MEC Zone C

- Consider expansion of this MEC to the east to permit expanded light industrial development
- Promote higher density to mitigate the high cost of land in this area. Encourage mixed use development at this MEC including office and retail
- Consider using redevelopment incentives to encourage redevelopment and infill at higher densities
- Discourage single family development from occurring within the MEC or to the east of this MEC to preserve the possibility of future expansion
- Promote redevelopment within the MEC including transitional land uses around the perimeter
  - As the current industrial properties age allow for the transition to office use
  - Ensure a balance office and industrial within this MEC given its high visibility and access to the transportation network

# Preliminary Strategies

## Preliminary Strategies for MEC Zone D

- Retain current light industrial and warehouse uses in this MEC – provide incentives for facility upgrades
- Prime location for data warehouses - County should participate in funding infrastructure upgrades to accommodate such uses should the opportunity arise
- Promote redevelopment of selected parcels within the MEC due to aging industrial and office product
- Similar to Lakewood Ranch, the County should consider measures to subsidized structured parking should densities increase
- Collaborate with nearby educational institutions to designated an area for a research and development industrial park
- Redraw the MEC boundary to include adjacent industrial lands
- Consider using redevelopment incentives to encourage redevelopment and infill at this MEC such as suspending impact fees within the MEC

## Preliminary Strategies for MEC Zone E

- Redevelopment of the Winn Dixie warehouse parcel – priority
- Address the need for transitional uses
- Promote land use transitions along the edge of this MEC

## Preliminary Strategies for MEC Zone F

- Location for expansion/creation of a new MEC at 1,500 – 2,000 acres (if current patterns of development continue) Development at higher density would require less land 250 – 500 acres.
- Plan for new MECs in south county, designated each MEC as predominantly office or predominantly industrial, or creating designated zones for each type of development
- Consider expanding MEC 12 and acquiring an appropriate parcel for future manufacturing expansion or relocation
- Consider releasing parts of MEC 15 for other non-employment land uses
- MEC 13 is a logical location for professional/ business office space – typically driven by rooftop growth

## Group Discussions

Impression of key findings

Vision for MECs in the future

# Next Steps

- Strategy refinement :
  - Land use, transportation, housing
- Innovative measures
- Action Plan
- Open House - June
- Website Updates – follow progress
  - <http://scgov.net/MEC>