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As early as the 1950’s, Manatee County leaders envisioned the Northwest Manatee County area as a hub for trade and commerce that would strengthen the tax base and provide jobs for County residents. In 1965, the County purchased more than 350 acres along the northwest coast of the County to launch a seaport - initially known as Barge Port and Industrial Port – it was later renamed Port Manatee. Since its dedication in 1970, the Port has expanded several times. In more recent years Manatee County has worked to foster economic development beyond Port boundaries through a variety of specialized services and development incentives.

Although the area beyond Port boundaries has seen development with projects including Air Products and Chemicals, Inc., Allied New Technologies, Thatcher Chemical of Florida, and a FedEx facility it has still not experienced commercial growth comparable to neighboring Hillsborough and Polk County to the north and southern Manatee and Sarasota County to the south. With strong manufacturing, warehouse and distribution development occurring elsewhere, Manatee County initiated the NW Manatee Plan to evaluate existing conditions within the Northwest Manatee area, review all previous plans and studies regarding the area, understand various existing incentives in place, and conduct a market analysis to determine key recommendations that will attract a greater market share of industrial uses to the area. Within the +/- 6,700-acre Study Area, the plan established three distinct tiers. Each tier was evaluated to identify potential build-out based on existing development rights. Then the Study Area was evaluated to identify potential build-out based on a market analysis of past trends within Manatee County and surrounding counties, with likely projections on future demand over the next 10 and 20 years.

An evaluation of build-out potential based on existing, approved development rights provides a broad view of what could be built under existing land development regulations, regardless of market realities. However, a market analysis also determines a range of potential and more realistic development scenarios for the overall Study Area. Based on past development history in Manatee County and current development trends within the region, three drivers of future growth should focus on e-commerce and manufacturing off Port property and Port Manatee related uses located within Port property. The most pertinent outcome of this analysis was a determination on the range of acreages required to accommodate potential growth of the three drivers. The results indicated that while the moderate, optimistic, and aggressive growth projections estimate significant building square footage requirements, the actual acreage needed to accommodate that growth will only require a small portion of the total acreage within the Study Area. This includes market analysis projections for the years 2030 and 2040.

Growth scenarios for the year 2030 project a potential range of demand between 620,000 sq. ft. and 2,500,000
sq. ft. of development. This would require between 120 to 200 acres of development on Port property, with up to an additional 120 acres off Port property, excluding land needed to support transportation infrastructure.

Growth scenarios for the year 2040 project a potential range of demand between 1,500,000 sq. ft and 6,000,000 sq. ft. of development. This would require between 185 to 430 acres of development on Port property, with up to an additional 470 acres off Port property, excluding land needed to support transportation infrastructure.

Situated west of I-75, north of I-275, and anchored on the east by Port Manatee, the Study Area has significant transportation networks within the overall area that will provide continued opportunity for development. The nearest interchange at I-75 is approximately 1.5 miles south of the Study Area at Moccasin Wallow Road and serves as a direct connection to US 41.

Understanding the existing transportation network, roadway improvements will need to be made as development occurs within the Study Area. Among these, an alternative alignment for Buckeye Road at the connection to US 41 will be required as existing utility restrictions will prevent widening on the western portion of the current alignment. A long-term plan for future direct connection to the western portion of the Study Area and I-75 is important to the long-term desirability of the area. A shorter-term goal should focus on further development of conceptual roadway plans, cost estimating of improvements, and identification of funding sources to expedite future roadway improvements as potential target development is secured.

Utilities including water, sewer, and power are available on the western portion of the Study Area. Potable water and sewer are located adjacent to US 41 from the south up to Piney Point Road, and portions of Buckeye Road. Additionally, potable water is available along the portion of Bud Rohden Road within the Study Area and plans include an extension of sewer along the same corridor. Presently, existing water and sewer plant capacity can serve warehouse, distribution and light industrial development in Tier 1. Future growth into Tiers 2 and 3, or larger heavy industrial may require a review of the current reserved sewer capacity held for approved development projects yet to be built. A policy change by Manatee County agreeing to fulfill sewer demands as development comes online versus holding reservations for potential future development based on entitlement approvals would likely alleviate some of the concern and perception of capacity issues. Florida Power & Light as the Area’s primary energy provider has committed to meeting the growing energy needs of Manatee County.

As development occurs, in addition to addressing current capacity policy with the sewer treatment plant, utilities will need to be extended further east over time into Tiers 2 and 3 of the Study Area. Depending on the type of use, a second power feed to create redundancy, in addition to what Florida Power & Light currently provides, may be desirable for refrigerated storage and other chilled uses. To expedite the ability of the County to meet future...
utility demand, there must be conceptual planning for expanded utilities, including power if needed, and identification of potential future funding sources.

Manatee County maintains a policy generally referred to as “first in pays” that requires future development to fund necessary infrastructure costs associated with new development. While this provides a certain level of financial security for the County, it can sometimes be a deterrent for new development, particularly in a strong development market. A strategic policy decision should include consideration of the establishment of an incentive program for targeted industries that removes the existing “first in pays” requirement to fund infrastructure improvements and be paid by the County. This policy decision becomes more significant if conceptual infrastructure plans have created with cost estimates and potential funding sources identified as recommended.

In the near term, recruitment and development efforts within the Study Area should be focused along the US 41 corridor and Tier 1. County efforts should focus on attracting additional manufacturing, warehouse, and light industrial related industries to the area. Amending existing land use regulations to expand the current area of Industrial Heavy land uses and to increase the intensity of Industrial Light land uses to broaden development opportunity will offer greater appeal to the area. Port Manatee growth efforts should focus on port specific uses and the continued development of vacant Port property.

Conversely, the large amount of acreage within the Study Area, particularly in Tiers 2 and 3 will likely react to current residential development pressures. Early recognition of an increasing manufacturing, warehouse, and e-commerce economy within this overall area will need to be included within performance standards to address separation of uses, buffers, co-mingling, or the separation of traffic needs, among others. Commercial demands due to potentially large residential developments, related retail demand, and overall economic development will necessitate accommodation of these uses within Tiers 2 and 3. Assuming a future I-75 interchange will eventually be constructed within the Study Area for direct connection to the Port, areas adjacent to I-75 should be included in these considerations.

Overall, Manatee County and the Northwest Study Area have a lot to offer future development.
1.0 EXISTING CONDITIONS AND ISSUES INTRODUCTION

Unique in its size and generally undeveloped condition, Northwest Manatee County is one of the few remaining large, developable areas west of I-75 in Sarasota, Manatee, and Hillsborough County.

By the early 2000’s plans for significant residential and commercial development that would encompass most of this area were underway. However, following the 2008 housing market collapse plans were halted and there has been limited development throughout the area since.

In addition to its large undeveloped land area, Northwest Manatee also includes Port Manatee as its western anchor. Developed in the 1960’s, the Port has grown over the years, and more recently in 2009 received approval for the first phase of a $750 million expansion plan. Built decades earlier with the intent of creating jobs, the County moved during the recession to identify opportunities and strategies that may encourage further industrial development surrounding the Port.

Today, as development has rebounded and surrounding counties have seen significant investment in industrial growth, this area has seen a limited amount of it. Residential development has remained strong within the region for several years, and pressure has returned to existing landowners within Northwest Manatee to once again sell. Unfortunately, residential and related commercial development within Northwest Manatee would likely be a significant deterrent to any future substantial light and heavy industrial development.

The purpose of this study is to identify constraints that have limited industrial growth in Northwest Manatee, conduct an economic assessment that determines what types of commercial or industrial development this area is marketable to, and identify a roadmap for the County to access this development.
1.1.0 INCENTIVES INTRODUCTION

Established in 2016, the Department of Redevelopment & Economic Opportunity (REO) has organized a series of incentive programs intended to spur new and existing business growth within Manatee County.

These provide a range of benefits from expedited reviews to financial incentives for development, with certain provisions.

Current incentive programs within Manatee County in this review fall under two primary areas, overall County and those related to port or industrial development. Combined, current incentives include those listed below. Incentives followed with an asterisk * represent those specific to the Northwest County study area:

- Rapid Response Services
- Multi-Modal Transportation Impact Fee Incentive
- Economic Development Ad Valorem Tax Exemption
- Economic Development Incentive
- Planned Development Encouragement Zone *
- Florida International Gateway *
- Port Improvement District TIF *
- Manufacturing Development Program *

MoneyRates.com ranks North Port/Sarasota/Bradenton the #1 Best City for Young Entrepreneurs in Florida - 2017

photo credit: MoneyRates.com
NORTHWEST COUNTY AREA

The Northwest County primary study area includes roughly 6,737 acres west of I-75, north of I-275, south of the Manatee/Hillsborough County lines, and east of and including Port Manatee. While the focus of the Northwest County study is within the primary study area boundary as shown below, the overall area will impact what happens within this boundary. Both primary study area and study area will be referenced within this report.

In general, the study area includes all land within the overall boundary description above, north of I-275, south of the Manatee/Hillsborough County lines, and east of Port Manatee. Lands generally adjacent to the primary study area and east of I-75 have also been included within the study area.

Over the last number of years, several incentive programs have been implemented to encourage industrial development. The study area as shown maintains the same boundary as the current Port Improvement District and the Manufacturing Development Program Overlay west of I-75. The study area does not include the area located east of I-75.

STUDY AREA TIERS

The study area was divided into three “tiers” based on distinguishing features of parcels within each tier as well as when each is expected to be developed or built-out over time. Tier 1 was established to consist of mostly developed lands both inside and outside of Port Manatee with existing access to US 41. Tier 2 was established to consist of a large tract of land, bordered by Grass Farm Road to the east, as well as several smaller tracts which are suitable for the next phase of development within the area following Tier 1. Tier 3 was established to consist of several large tract residential homes as well as the remaining large tracts of land closer to Interstate-75 which are expected to be developed following Tier 2.
1.1.1 RAPID RESPONSE SERVICES

Designed to expedite the due diligence process and subsequent development, Manatee County established the Rapid Response Service.

Development-related information pertinent to zoning and building, transportation, utilities, infrastructure, health, and life safety considerations are guided by dedicated staff within the Redevelopment & Economic Opportunity Department.

This service requires that the customer contact staff prior to submittal of plans for all new and existing business development requiring County related services.

Planning, permitting, inspections & concurrency related services and plans that may be included within Rapid Response are those such as:

- Concurrency
- Preliminary Site Plan (PSP)
- Rezone
- Construction Plans
- Final Site Plan (FSP)
- Building Permits

To be eligible for this service, the company must plan to create at least five (5) quality jobs with wages at or above the current Manatee County average annual wage and is required to provide significant capital investment within the County.

1.1.2 MULTI-MODAL TRANSPORTATION IMPACT FEE INCENTIVE (M-TIFI)

The Multi-Modal Transportation Impact Fee Incentive (M-TIFI) provides relief from the multi-modal impact fee to expanding or new businesses throughout Manatee County.

Businesses must create at least five (5) quality jobs in one of Enterprise Florida’s targeted industries which include CleanTech, Life Sciences, InfoTech, Aviation/Aerospace, Homeland Security/Defense, and Financial/Professional services. Jobs created must be at or above 115% of Manatee County’s average annual wage. The amount of the relief is based on the square footage of construction, the use of the building, multi-modal impact fees assessed, the average annual wage of the company, and is paid when the company completes construction activities and applies for the Certificate of Occupancy.

1.1.3 ECONOMIC DEVELOPMENT AD VALOREM TAX EXEMPTION (EDAVTE)

The Economic Development Ad Valorem Tax Exemption Program (EDAVTE) was established to financially incentivize the relocation of new businesses to, and the expansion of existing businesses within Manatee County.

The Program allows for the exemption of up to 100-percent of the assessed value of all improvements to real property made by new businesses or expanding existing businesses for up to ten (10) years. New or expanding businesses, are defined by Section 196.012 of Florida State Statute.

Percentage and duration of the exemption is subject to consideration by the Manatee County Board of County Commissioners and is dependent on:

- Number of new full-time positions created by business as a result of relocating or expanding in Manatee County
- Average wage of new employees of the business located in the County
- Amount of capital investment
- Innovative business concepts
- Commitment to local procurement
- Net positive contribution to local economy

The Economic Development Ad Valorem Tax Exemption Program is scheduled to sunset on June 18, 2023 and can be extended for subsequent 10-year renewals.
1.1.4 ECONOMIC DEVELOPMENT INCENTIVE GRANT (EDI)

The Economic Development Incentive Grant (EDI) is a local incentive and is available to qualified applicants that create new high-wage job opportunities, with exceptionally high wages and capital investment within Manatee County. This grant is available to expanding businesses currently in Manatee County or for new businesses coming to it. Each grant application is considered within an economic impact model to determine the potential return on investment by Manatee County to the overall impact of the project.

The potential grant is based on the number of jobs created and percentage above 115% of the county average local wage. This grant requires a minimum of ten (10) new jobs created.

Eligible companies must also be compatible with the surrounding environmental conditions, and each grant is based on a business by business basis.
1.1.5 PLANNED DEVELOPMENT ENCOURAGEMENT ZONE (PDEZ)

The Planned Development Encouragement Zone (PDEZ) is an established zoning district with the Manatee County Land Development Code.

The purpose of the district is to encourage port-compatible development on vacant lands within the vicinity of Port Manatee. This type of use may include manufacturing, utilities, motor freight terminals, alternative energy generation facilities, outdoor storage, warehouses, distribution centers, and a variety of other light and heavy industrial uses.

Currently, there are more than 1,800 acres that have been rezoned to this classification. As a voluntary process, the PDEZ boundary change if additional property owners pursue a rezoning to this zoning designation.

The purpose of this zoning designation is to provide a landowner the opportunity to get advance approval for a variety of port-related uses. Once the PDEZ rezoning is approved with the various potential uses, the property owner can then market their property for those available uses. Once a decision is made to develop the property, the process will be administrative.

Although landowners may apply for their own PDEZ designation, the process typically includes multiple properties at one time.

County staff will work as a partner when multiple properties are in the process, and will assist in coordinating the applications and other necessary items with the applicants. Fees are subsequently divided among the applicants to save costs.
1.1.6 FLORIDA INTERNATIONAL GATEWAY (FIG)

The Florida International Gateway (FIG) is a future land use and zoning overlay meant to encourage growth which is consistent with the long term needs of Port Manatee through the use of dual entitlements. The FIG encompasses approximately 3,800 acres.

This overlay allows for a range of light industrial, mixed-use and other employment-oriented uses in addition to the uses permitted in the underlying FLU of the property. Examples of additional uses permitted within the FIG overlay include offices, light industrial, warehouse and distribution, intensive and wholesale commercial, public or semi-public uses, hotels, and short-term agricultural uses.

Properties wishing to develop under the Florida International Gateway overlay district must submit a Gateway Overlay Master Plan which specifically demonstrates how compatibility between the residential and non-residential uses will be provided via site design and appropriate buffers and screening.
1.1.7 PORT IMPROVEMENT DISTRICT TIF

The Port Improvement District is an established tax increment finance district in which the amount of ad valorem taxes levied by Manatee County each year within the district’s boundaries are deposited into the Port Manatee Improvement Trust Fund.

Monies deposited into the trust fund can be used to pay debt service on indebtedness issued by Port Manatee, fund port-related economic development activities, fund County-owned capital infrastructure improvements, and fund capital improvements to Port Manatee.

To date, there has been limited new development activity within the district’s boundaries therefore there has been limited tax increment revenue generated.

The Port Manatee Improvement District is scheduled to automatically sunset and terminate on September 31, 2024 but can be extended via amendment to Section 2-29-141 of the County’s Code of Ordinances.
1.1.8 MANUFACTURING DEVELOPMENT PROGRAM (MDP)

The Manufacturing Development Program (MDP) was established by Manatee County pursuant to the State of Florida’s Manufacturing Competitiveness Act of 2013 to facilitate the permitting, development, and expansion of new and existing manufacturing businesses within Manatee County.

The Program allows manufacturing businesses located within the Manufacturing Development Overlay District of the County to apply for the approval of a Master Development Plan which serves as local government development approval of specified manufacturing uses at specified development intensities on a specific site. This program may be applied to a single ownership or a group of properties with a common goal.

Upon securing local MDP approval, manufacturing businesses only need to pursue local building permits and applicable state permits, if necessary. Additionally as part of the Manufacturing Development Program, businesses are eligible for an expedited state-level review process coordinated through the Department of Economic Opportunity (DEO) and other participating state agencies such as the Florida Department of Transportation (FDOT), the Florida Department of Environmental Protection (FDEP), the Florida Fish and Wildlife Conservation Commission, and the states five Water Management Districts.
1.2.0 Regulations

1.2.0 REGULATIONS INTRODUCTION

Within Manatee County and the study area, there are several guiding documents that regulate future development including the County’s Comprehensive Plan, Land Development Code and the Capital Improvement Program. Each of these have specific elements, goals, or objectives that support further economic growth within the general study area. Section 1.3.0 of this study include plans that contain various recommendations that have been developed over the years specific to all or portions of the Northwest County study area, some of which are reflected in the documents within this section as enabling tools.

The following pages provide an overview on applicable regulatory framework within the study area and include Manatee County’s:

- Comprehensive Plan
- Future Land Use
- Zoning
- Capital Improvement Program
1.2.1 COMPREHENSIVE PLAN

Following revisions to the Local Government Comprehensive Planning and Development Regulation Act by the Florida Legislature in 1985, all local governments, regardless of size, location or growth expectations were required to develop a Comprehensive Plan to be the basis for future land use decisions. The Comprehensive Plan for Manatee County was adopted in 1989 and has had numerous amendments since.

In addition to responding to state law, Comprehensive Plans include goals specific to each community. Manatee County’s Comprehensive Plan (CP) identifies four objectives which pertain specifically to the Northwest County study area.

Objective 2.1.4. Economic Activity Areas

As part of the Future Land Use (FLU) Element of the CP, Objective 2.1.4. “Economic Activity Areas” encourages the development of mixed-use areas throughout Manatee County to strengthen and diversify the County’s economy.

This objective entails identifying areas intended for mixed-use intense economic activity and establishing standards within the Land Development Code (LDC) to mitigate the impact of light industrial uses on neighboring residential uses. This includes the utilization of buffers, setbacks, exterior lighting controls, noise barriers and operating hour limits. Along with these standards, the LDC shall offer development incentives in these areas which are identified for planned residential and light industrial mixed-use development. These incentives can include expedited development review, density, or intensity bonuses, targeted infrastructure, public/private partnerships, or workforce training.

Objective 2.2.2. Future Land Use Overlay Districts

Objective 2.2.2 of the FLU Element entitled “Future Land Use Overlay Districts” establishes targeted geographic areas in Manatee County within which highly specialized policies can be implemented. The Florida International Gateway (FIG) Overlay, established by policy 2.2.2.9 of the CP, is meant to encourage growth consistent with the long-term needs of Manatee County near Port Manatee.

The overlay defines a specific area in which a range of light industrial, mixed use, or employment-oriented uses may be considered in addition to those permitted by the underlying Future Land Use Categories (FLUC) of properties provided compatibility between residential and non-residential uses has been established and provisions have been made for all required public facilities.

Objective 2.6.2 Industrial Compatibility and Performance Measures

Objective 2.6.3 of the FLU Element entitled “Industrial Compatibility and Performance Measures” serves to ensure industrial development is compatible with surrounding adjacent uses. This includes the establishment of performance standards which are used to distinguish between light and heavy industrial uses by identifying any potential “objectionable impacts” on adjacent or nearby residential uses. Such performance standards address distinguishing parameters such as the toxicity and degree of hazard associated with raw materials, by-products or finished products; degree and nature of daily traffic; level of noise, atmospheric or surface water emissions and discharges, level of odor, glare, vibration or outdoor storage associated with the use.

Objective 5.7.1 Port and Economic Development

As a part of the Transportation Element of the CP, Objective 5.7.1. “Port and Economic Development” aims to increase the significance of Port Manatee in diversifying the economic base of Manatee County and the region. This objective includes policies geared towards assisting existing Port tenants in expanding and improving operations, securing additional port tenants, promoting port-related development that provides employment opportunities to the region, providing adequate port facilities which meet industry needs, and increasing capability to accommodate market shifts in cargo’s.
1.2.2 FUTURE LAND USE

Manatee County’s Future Land Use Map (FLUM) identifies a total of seven (7) Future Land Use Categories (FLUC) within the Northwest County primary study area which are defined by the Future Land Use Element of the Comprehensive Plan (CP). Of these seven (7) FLUC’s three (3) comprise up to 95 percent of the total primary study area, the Urban Fringe-3 (UF-3) category, the Industrial-Heavy (IH) category, and the Industrial-Light (IL) category.

Making up approximately 41 percent of the primary study area, the UF-3 FLUC is the most predominant category and comprises the entire eastern portion of the primary study area extending to Interstate-75. This FLUC is intended for areas of low density urban or clustered low-moderate density residential environments which are generally developed through the planned unit development (PUD) process. The range of potential uses allowed in the UF-3 FLUC include suburban or urban density planned residential developments, integrated residential support uses, neighborhood or community serving retail wholesale and office commercial uses, short-term agricultural uses, public or semi-public uses, schools, and low intensity recreational uses.

Comprising approximately 32 percent of the primary study area, the IH FLUC is the second most prominent FLUC and makes up a majority of the northeast and central portion of the primary study area. This FLUC is intended for areas of heavy and light industrial and other employment-oriented uses, and to prohibit residential development in these areas to avoid adverse impacts in regard to height, noise, smoke, dust, vibration, or glare. The range of potential uses allowed within the IH FLUC include heavy and light industrial uses, deep-water port related uses, research or corporate office uses, warehouse and distribution uses, intensive commercial uses and neighborhood serving retail uses which would provide for the needs of workers in, visitors to, and residents nearby.

In addition to the FLUC’s established by the FLUM and Future Land Use Element (FLUE) of the CP, future land use overlay districts are also established. These overlays are meant to establish targeted geographic areas on the County’s FLUM within which highly specialized policies can be implemented.

Specifically, the Florida International Gateway (FIG) Overlay, established by policy 2.2.2.9 of the CP, is intended to encourage growth consistent with the long-term needs of Manatee County near Port Manatee, for light industrial development integrated with low-density, or clustered low-moderate density mixed use. Lands within the FIG Overlay can be developed with a range of light industrial, mixed-use, or other employment related uses in addition to those uses permitted in the underlying FLUC of lands within the overlay. In general, this allows for the range of uses, densities, and intensities of the Industrial-Light (IL) FLUC to be used in addition to the underlying FLU Categories within the overlay.

### Table: 1 - Future Land Use

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<th>Future Land Use</th>
<th>Acreage within Study Area</th>
<th>% of Study Area</th>
</tr>
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<tbody>
<tr>
<td>UF-3 / Urban Fringe 3</td>
<td>2,764 ac</td>
<td>41.03%</td>
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<tr>
<td>IH / Industrial-Heavy</td>
<td>2,162 ac</td>
<td>32.09%</td>
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<tr>
<td>IL / Industrial-Light</td>
<td>1,488 ac</td>
<td>22.08%</td>
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<tr>
<td>P/SP-1 / Public/Semi-Public (1)</td>
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<td>4.04%</td>
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<tr>
<td>RES-1 / Residential-1</td>
<td>23 ac</td>
<td>0.34%</td>
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<tr>
<td>CON / Conservation Lands</td>
<td>14 ac</td>
<td>0.21%</td>
</tr>
<tr>
<td>ROR / Retail/Office/Residential</td>
<td>14 ac</td>
<td>0.21%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>6,737 ac</strong></td>
<td><strong>100.00%</strong></td>
</tr>
</tbody>
</table>
1.2.3 ZONING

As part of the Land Development Code, the Zoning Map aids in implementing the Comprehensive Plan by providing regulations, procedures and standards for both review and approval of all development within unincorporated Manatee County.

Zoning Districts

Manatee County’s Official Zoning Atlas identifies a total of ten (10) zoning districts within the Northwest County primary study area which are defined by Chapter 4, Section 401 of Manatee County’s Land Development Code (LDC). Of the zoning districts identified, three (3) make up more than 80 percent of the total primary study area, the Planned Development Mixed-Use (PDMU) district, the Planned Development Encouragement Zone (PDEZ) district, and the Planned Development Port Manatee (PDPM) district.

The PDMU zoning district comprises a majority of the eastern portion of the primary study area, approximately 35 percent, and is intended for the complimentary grouping of residential, commercial, office and industrial uses. The range of permitted uses within this district range from multi and single-family residential, neighborhood retail, schools, short-term agricultural uses, and light and heavy industrial uses.

The PDEZ district makes up a majority of the center portion of the primary study area at approximately 26 percent. This intends to encourage port related development by allowing property owners to receive advanced approval of a variety of port-related uses such as light and heavy industrial uses, utility uses, alternative energy generation facilities, outdoor storage and agricultural uses when rezoning to the PDEZ district.

The PDPM district makes up most of the western portion of the primary study, approximately 18 percent to encompass lands owned by Manatee County Port Authority. The PDPM zoning district is meant to accommodate intermodal transportation and seaport related uses including commercial, industrial, manufacturing, and product assembly uses.

The remaining portion of the primary study area is comprised of seven (7) zoning districts. The General Agriculture (A) district comprises approximately nine (9) percent of the area and is intended to preserve agricultural lands and promote general agricultural economic activity or uses consistent with such activity, including single-family residential and alternative generation facilities. The Planned Development Public Interest (PDPI) zoning district comprises approximately three (3) percent and is meant to accommodate public or semi-public uses such as solid waste disposal facilities, water treatment plants or fire stations and sheriff’s facilities. The Agricultural Suburban (A-1) district also comprises approximately three (3) percent and is meant for areas transitioning from rural to urban or suburban character. The Planned Development Industrial (PD-I) district makes up approximately two (2) percent and encourages the complementary groupings of related manufacturing,

<table>
<thead>
<tr>
<th>Zoning Designation</th>
<th>Acreage within Study Area</th>
<th>% of Study Area</th>
</tr>
</thead>
<tbody>
<tr>
<td>PD-MU / Planned Development Mixed-Use</td>
<td>2,375 ac</td>
<td>35.25%</td>
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<tr>
<td>PD-EZ / Planned Development Encouragement Zone</td>
<td>1,789 ac</td>
<td>26.55%</td>
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<td>PD-PM / Planned Development Port Manatee</td>
<td>1,220 ac</td>
<td>18.10%</td>
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<td>A / General Agriculture</td>
<td>617 ac</td>
<td>9.16%</td>
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<td>PD-PI / Planned Development Public Interest</td>
<td>218 ac</td>
<td>3.24%</td>
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<tr>
<td>A-1 / Agricultural Suburban</td>
<td>200 ac</td>
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<td>PD-I / Planned Development Industrial</td>
<td>127 ac</td>
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<tr>
<td><strong>Total</strong></td>
<td><strong>6,737 ac</strong></td>
<td><strong>100.00%</strong></td>
</tr>
</tbody>
</table>

Table: 2 - Zoning
processing, assembly, and distribution uses adjacent to major streets. The Heavy Manufacturing (HM) district also makes up approximately two (2) percent and is intended for light and heavy industrial uses which may have objectionable impacts on adjacent residential uses with regard to height, noise, dust or glare. The Light Manufacturing (LM) district comprises one (1) percent and is meant for light industrial or intensive commercial uses such as bulk storage, processing and assembling, or mechanical or chemical transformation of materials. The Neighborhood Commercial-Small (NC-S) district comprises less than one (1) percent and serves to accommodate limited daily retail or service needs of surrounding residential neighborhoods.

Overlay Districts

In addition to establishing the zoning districts, Chapter 4 of Manatee County’s LDC also establishes zoning district overlays in Section 403 entitled “Overlay Districts.” Of the overlays established by this section of the LDC, two are within the primary study area, the Florida International Gateway (FIG) Overlay District and the Manufacturing Development Overlay (MDO) District.

The FIG Overlay, located in the eastern portion of the primary study area, is meant to encourage growth consistent with the long-term needs of Port Manatee and the economy of Manatee County as a whole.
Lands located within the FIG Overlay are eligible to be developed with a range of light industrial, mixed-use, or employment-oriented uses in addition to the uses permitted by the underlying future land use category (FLUC) of the land. Such uses include warehouse and distribution, intensive or wholesale commercial, research and corporate office, public or semi-public and light industrial uses. Property owners who choose to develop property in accordance with the FIG Overlay are required to submit a master plan to be reviewed by Manatee County’s Planning Commission and the Board of County Commissioners. Such master plan shall depict how the development plan implements the goals, objectives, and policies of the FIG Overlay and how compatibility between residential and non-residential uses is achieved through buffering and screening standards.

The MDO Overlay comprises the entirety of the Northwest County primary study area and is meant to assist in implementing Manatee County’s Manufacturing Development Program. The MDP was established pursuant to the State of Florida’s Manufacturing Competitiveness Act of 2013 and intends to facilitate and encourage the development and expansion of new and existing manufacturing businesses within Manatee County.

The MDP allows manufacturing business located within the MDO district to apply for the approval of a Master Development Plan (MDP) which serves as local government development approval of specified manufacturing uses at specified development intensities on a designated site. Upon securing local MDP approval, manufacturing businesses only need to pursue local building permits and are eligible, if necessary, for an expedited state-level review process coordinated through the Department of Economic Opportunity (DEO) and other participating state agencies such as the Florida Department of Transportation (FDOT), the Florida Department of Environmental Protection (FDEP), the Florida Fish and Wildlife Conservation Commission, and the states five Water Management Districts.
1.2.4 CAPITAL IMPROVEMENT PROGRAM

Objective 10.1.6 of the Manatee County Comprehensive Plan requires that Manatee County develop a Capital Improvement Program (CIP), which provides for programming and funding of capital projects that are consistent with the goals, objectives, and policies of the Comprehensive Plan and the Future Land Use Map. The CIP is also intended to maintain the adopted Level of Service (LOS) established by the County.

The CIP establishes a capital project annual budget for a period of five years. Capital expenditures are generally, as defined in the Comprehensive Plan, physical assets that are constructed or purchased to provide, improve, or replace a public facility, and which are large scale and high in cost. These are generally non-recurring however they may require multiple years of funding to complete. Dedicated funds or sources are included, and those projects without funding are included as projects of record.

Manatee County’s FY19-23 CIP includes $1.44 billion in projects either appropriated and underway ($599.2 million) or projects with activity within five-year program ($844.0 million). The CIP includes Volume I – All Funded Projects, Volume II – Infrastructure Sales Tax Projects, and Volume III – All Appropriated Projects.

Projects in the CIP are typically funded by various sources. Manatee County transportation projects are generally funded through impact fees, gas taxes, general funds and the infrastructure sales surtax. Wastewater is generally funded through utility rates, facility investment fees and debt services, however County bond covenants restrict certain upfront investments in utilities. Public safety projects are generally funded through general revenues and the infrastructure sales surtax.

Within the Northwest County study area projects included within the CIP are related to transportation, wastewater and public safety as identified below. Those followed with an * asterisk are funded in part or whole by the infrastructure sales tax.

**TRANSPORTATION:**

Mocassin Wallow Rd - US 41 - Ellenton-Gillette*

Reconstruct and widen existing two-lane road to a four-lane divided roadway with standard lane widths, pedestrian & bicycle facilities, and lighting.

Cost: $6,371,000  
Construction: 10/19 - 12/22

Mocassin Wallow Rd - US 41 to Gateway Blvd

Design and land acquisition for an ultimate build out of a six-lane road. Construct four lanes from US41 to Gillette drive (west of I75), with bike lanes, sidewalks, and street lighting.

Cost: $7,880,363  
Construction: 1/18 - 12/22

Mocassin Wallow Rd - Ellenton Gillette - Gateway - 49th Ave East*

Reconstruct and widen existing two-lane road to a four-lane divided roadway with standard lane widths, pedestrian & bicycle facilities, and lighting.

Cost: $7,390,000  
Construction: 10/19 - 12/22

**WASTEWATER:**

Mocassin Wallow Road - 12" Force Main Extension

Installation of approximately 3,400 linear feet of 12" Force Main on Mocassin Wallow Road east of US41 to Bud Rhoden Road (Ellenton-Gillette).

Cost: $323,775  
Construction: 19/19 - 12/22
Mocassin Wallow Force Main Extension from Bud Rhoden Rd to Artisan Lakes MLS

Install approximately 7,615 Linear Feet (LF) extension of 12-inch Mocassin Wallow road force main from Bud Rhoden Road to Artisan Lakes Master Lift Station.

Cost: $1,112,050  
Construction: 10/18 - 12/19

Artisan Lakes Master Flow Meter & Wet Well Rehab

Install new above ground flow through Magmeter. Clean and inspect existing wet well fiberglass liner, repair as needed. Clean prep and make any needed repairs to concrete structure before application of liner repairs. Inspect discharge piping, guide rails, pipe bracing, base ells, influent force main brackets, and/or mounting plates for corrosion damage, remove and replace as necessary. Remove and replace submersible pumps. Evaluate and replace heating ventilation and air conditioning (HVAC) system for climate control inside the station.

Cost: $1,156,750  
Construction: 3/2 - 12/22

Port Manatee Force Main Replacement RTU#567 #574

Replace approximately 1,300 linear feet of 4" force main and 700 linear feet of 4" force main.

Cost: $288,210  
Construction: 9/18 - 10/19

PUBLIC SAFETY:
Manatee County Sheriff’s Office – Jail*

The Manatee County jail was allocated funding within the sales tax for approximately 25 different projects within the jail and grounds.

Cost: $26,000,000+  
Construction: Ongoing

Capital Improvement Projects within the Study Area:

1. Mocassin Wallow Rd - US 41 - Ellenton Gillette
2. Mocassin Wallow Rd - US 41 to Gateway Blvd
3. Mocassin Wallow Rd - Ellenton Gillette - Gateway -49th Ave East
4. Mocassin Wallow Road - 12" Force Main Extension
5. Mocassin Wallow Force Main from Bud Rhoden Rd to Artisan Lakes MLS
6. Artisan Lakes Master Flow Meter & Wet Well Rehab
7. Port Manatee Force Main Replacement RTU #567, #571
8. Manatee County Sheriff’s Office - Jail

Map 11: Capital Improvement Projects within the Study Area
1.3.0 Plans

1.3.0 PLANS INTRODUCTION

Over the last several years there have been a number of studies and plans that have been developed for the overall Northwest County area. Generally initiated by Manatee County, the MPO, FDOT, or private landowners, they all seek to identify and develop a longer term vision for development of the area. Some elements within these have been adopted or acted upon, while others, for a variety of reasons, have not been.

Each one has relevance for understanding the past recommendations within the study area as well as providing an existing framework for future development considerations.

- Port Manatee Master Plan Update
- How Will We Grow
- ULI Advisory Services Panel Report
- West Buckeye Plan
- MPO Long Range Transportation Plan
- FDOT Adopted Five Year Work Program Fiscal Years 2019-2023
- FDOT Manatee County Freight & Logistics Overview
- Port Connector Study
- Bradenton Area Economic Development Strategic Plan
1.3.1 PORT MANATEE MASTER PLAN UPDATE

Updated in 2016 by AECOM, the Port Manatee Master Plan Update (MPU) provides a framework to guide the Port for the following decade or more, including potential opportunities for expansion, diversification, and economic impact while also balancing environmental stewardship. The study area for the updated plan included all land within the Port Manatee Improvement District.

In preparing the plan, AECOM considered numerous federal, state, and county documents, plans, acts, studies, and potential funding opportunities. Together, these support the environment as necessary for the Port to reach its expansion and diversification goals, particularly job-generating infrastructure investment.

The plan update did not result in one development scenario or recommendation to implement. Instead, it provided multiple scenarios Port Manatee may pursue, or begin to follow if there is growth of specific products identified in each scenario.

Classification

Classified as a semi-rural port, Port Manatee’s facilities consist of approximately 1,100 acres of land, a nearly 1,600-foot-long ship basin, and a 2.9-mile-long access channel that links the basin with the federal channel in Tampa Bay. The Port also has ten (10) berths, ten (10) acres of a 52-acre, fully developed containerized cargo site, two mobile harbor cranes, underground pipelines from five berths for petroleum products, and a roll-on- roll-off (RO-RO) berth accommodation for trailers and rolling equipment. Also included within the Port is warehouse space for general cargo which totals more than one million sq ft including more than 200,000 sq. ft. of refrigerated space, 200 stationary reefer plugs and 80 portable receptacles. A future planned multi-user cold storage facility will add nearly 150,000 sq ft of additional space. Also located within the property are the Port’s administrative offices, Access Control Center, Intermodal Center and terminal once used for cruise operations.

Market Forecast

At the time of the MPU, the Port had been adversely affected by several economic, trade, and competitive factors. By 2015, cargo volumes moving through the Port dropped below two (2) million short tons, well below a 2005 peak of 5.6 million short tons. However, a pipeline capacity improvement assisted in
generating a 19% increase in the flow of natural gas through the Port by Gulfstream. Additionally, future growth projections for Florida and the region show an accelerated pattern of growth that could be positive for the Port.

Import projections identified within the plan were optimistic, including a resurgence in petroleum products, a buildup in volume of new dry bulk and a gain in container trade and general cargo. Anticipation of a significant increase in liquid bulk import tonnage resulting from a planned increase in tank farm activity and the emergence of new commodities also contributed to increased volume gains of 7.5 percent through 2025.

Exports from the Port have historically been cyclical for several years prior to the MPU and are anticipated to continue as such in the upcoming years.

Overall the Port anticipates an average annual growth trend in tonnage of 8.3 percent through the year 2025, at which time it is anticipated that the annual volume of the Port will reach 8.9 million short tons. Containerized operations at the Port including imports, exports and empty boxes are anticipated to grow at an annual average growth rate of five (5) to six (6) percent through the year 2025.

Development Scenarios

Looking forward, the MPU considered five-and ten-year Maintenance and Expansion Programs based on current and forecasted commodity flows, with additional consideration for new business opportunity demands. These were translated into four development scenarios the Port may pursue, A through D, which combined with support facilities, are anticipated to sustain future growth at the Port. Each scenario relates to one of the Port’s primary business lines and short term (1-5 years), and long term (6-10 years) expansion improvements.

Additionally, the MPU also identifies a “synergy development model” that suggests potential port-related growth beyond the Port-owned land. This model also includes the introduction of a heavy-haul route connecting the Port to the PDEZ.

Scenario A: Containers, Perishables, and Liquid Bulk (Citrus Juice)

This scenario projects an annual growth rate of five (5) to six (6) percent in perishable imports including bananas, melons, and pineapples which are among the Port’s primary containerized commodities. Future expansion projects required to continue growth in this scenario may include new refrigerated warehouses, reefer plugs, yard and equipment; expansion of the Intermodal Container Area; renovation of the Intermodal Center, container and perishable expansion; and truck staging in the short term. Longer term projects include additional yard equipment, a rail extension, expansion of the Intermodal Container Area, dredging, construction and backlands of Berth 2, access road improvements, and a new turning basin.

Scenario B: Cruise/Ferry and Auto Imports

This scenario considers the Port’s ability to quickly prepare for the requirements of a prospective tenant and provide “shovel-ready” space by re-purposing or enhancing existing buildings or unoccupied land.

Future expansion projects that may be required to continue growth in this scenario include renovation of a cruise/ferry terminal, vehicle staging for ferry cargo imports and exports, resurfacing of parking lots,
modification of RO-RO bulkhead, and signage and striping for existing parking areas at access control in the short term. Longer term projects include auto import storage and rail spur, upgrading of South Dock Street, connection of South and North Dock Street to the conceptual EZ Access Road alignment, and relocation and expansion of the South Gate.

Scenario C: Dry Bulk and Aquaculture

This scenario identifies areas that could be used for future expansion of dry bulk, if needed, within the Port including how new facilities, such as Berth 3 and the proposed extension of Bay Street, could serve short-term needs of another business such as containers while meeting long-term needs for dry bulk. This scenario also considers the potential for new land acquisition.

Projects identified in the short-term include New Berth 3 dredging, construction and backlands; and the extension of Bay Street. Long term projects include a new turning basin, expansion of North Dock Street, a flexible expansion area, and dry bulk expansion.

Scenario D: Energy/Petroleum

This scenario recognizes ongoing major changes in the oil and gas industries that have impacted traditional operations. It considers coordinated utilization for port-related businesses and growth both on-site and off-site. On-site areas of potential growth are located such that they would support present tenant expansion. Public/private partnerships are also considered for Port-owned and off-site areas for future development.

Short term projects related to this scenario would include expansion of petroleum lines and necessary land use, extension of Bay Street and the petroleum intermodal expansion as well as any other expansions resulting from a public/private partnership. Long term projects include further petroleum land use expansion and any projects required from a public/private partnership(s).

Synergy Development Model – A Vision for Growth

In addition to the four scenarios, the MPU considers a Synergy Development Model. This model looks at future Port growth and ways to facilitate a “shovel ready” framework within Port Manatee that considers assets of the Port including its available land, transportation access, infrastructure support and speed of delivery to create a symbiotic relationship among Port customers, tenants, adjacent properties and the community. This model also considers the County’s proposed conceptual EZ Access Road alignment and connections of both North and South Dock Streets to the alignment.

The MPU also evaluated impacts associated with each development scenario including infrastructure construction, permitting, mitigation, dredge material management, stormwater, potable water, sanitary sewer, electrical, transportation systems, and berth utilization.

Overall, to implement the five- and ten-year maintenance and expansion plans, and achieve the goals of the Port, the MPU developed a $126 million phased five-year capital improvement plan (CIP).
1.3.2 HOW WILL WE GROW

Arising from the challenges posed following the economic boom and bust of the early 2000’s, the How Will We Grow? A Conversation with the Community study addresses potential challenges in historic growth management policies and regulations that had guided development in the County for many years.

Rather than continuing to follow existing development regulations that supported low density suburban growth, staff was challenged with examining development from the perspective of infrastructure as assets, and understanding the costs associated with it.

Key questions that guided the process included

• Are we capitalizing on our current infrastructure and service assets?
• Is our existing infrastructure maximized in terms of the number of customers it’s capable of serving?
• Does infrastructure support or hinder redevelopment efforts in established areas?
• Is new development maximized and balanced in terms of customers/fees/taxes versus cost of services?
• Is the County assisting with economic development in how it handles infrastructure delivery?
• How does all of this relate to past public workshops and citizen input on growth?
• How does all of this compare to future trends?

From this process, the report resulted in more than a year’s worth of work that included review of past planning studies, internal stakeholder discussions and data analysis that involved review of the County’s existing infrastructure assets with estimates of population projection demands. The goal was to look at long range planning in terms of maximizing return on investment by the County while also recognizing that the desirability of conventional low-density suburban development lacks desirability with younger generations who desire more urban, walkable, and greener communities.

Completed in February 2013, the study developed three alternative growth scenarios that could guide the future of Manatee County.

**Alternative 1 - Stay the Course**

This alternative continues to maintain the development plans within the County’s Comprehensive Plan Future Land Use Map and Land Development Code which would continue the low-density suburban development.

**Advantages**

• Well known and understood land development market and regulations by agencies, consultants, developers and financiers.
• Lower short-term costs of implementation.
• Future predictability in growth.
Disadvantages

- Development occurs in areas regardless of any availability or proximity to utilities and services.
- Continued development as it puts premature strain on existing infrastructure.
- Utility extensions may be challenged in meeting minimum flow levels without expansive maintenance work, and there is little redundancy provided without having looped utility systems.
- Existing roadway system creates challenges in meeting traffic flow, concurrency, public safety, and convenient travel.
- Future growth patterns will challenge future alternative transportation modes or transit.

Alternative 2 - Southwest County

With a focus on growing the Southwest County area and including areas within the County that are more suitable for increased height and density, this alternative also reflects existing county-wide entitlements.

Advantages

- Focuses development in areas closer to existing communities, services, and transportation networks.
- Increases the mass of population near employment core.
- Increases opportunity for infill and redevelopment.
- Allows for higher rate of replacement utility lines with increased capacity for existing and future development rather than installing new lines solely for future growth.

Disadvantages

- Greater difficulty in redevelopment related to existing infrastructure, stormwater, concurrency, etc.
- Historic development patterns may not align with taller and more dense development.
- Redevelopment may be limited until the area reaches build out.
- Limited Southwest County development likely until traffic concurrency and level of service is

Alternate 3 - Activity Centers shifts to identifying specific areas that can be encouraged to support greater density and uses while respecting existing established neighborhoods.

Activity Centers

source: How Will We Grow
addressed.
• Some citizenry may not embrace redevelopment or change.
• Coastal high hazard concerns within some areas of Southwest County.

**Alternative 3 - Activity Centers**

Alternative 3 focuses on creating activity centers, or areas of greater density and uses within designated locations throughout the County while respecting existing established neighborhoods and accommodating lower density suburban development beyond them.

**Advantages**

• Focuses on a more efficient land use pattern while bringing support services to existing and future low-density suburban growth.
• Emphasizes placement of new residents closer to employment core within the County while creating additional employment opportunities elsewhere.
• Creates greater opportunity for redevelopment throughout the County.
• Minimizes sprawl.
• Establishes town and/or neighborhood centers with transit opportunities.
• Makes available the Transfer of Development Rights to transfer densities into these areas.

**Disadvantages**

• Investment patterns from development community may not align with the Activity Center approach.
• Traffic concurrency likely needs to be addressed prior to being feasible.
• Citizenry may oppose development for the sake of opposing it.

**Good Ideas (No Matter What Alternative is Chosen)**

The study also identified “Good Ideas (No Matter What Alternative is Chosen)” to be looked at as future tasks for potential policy changes regardless of which growth alternative is selected. These specifically addressed:

• Capital Improvements Program
• Economic Development
• Education
• Financing
• Government Services
• Land Development & Redevelopment
• Parks & Recreation
• Public Safety
• Transportation
• Utilities

In the decision-making process, the continued involvement of citizens and stakeholders is emphasized as a critical element. The study also identifies several considerations for future infrastructure planning and funding, including creating a Municipal Services Taxing Unit (MSTU), creating a Stormwater Utility, increase the Local Government Infrastructure Surtax (1%), consider a State Sales Tax Rebate related to sports performance facilities, and implementing infrastructure fees that reflect the costs of providing infrastructure based on the area being developed.
1.3.3 ULI PANEL REPORT

Initiated by the Board of County Commissioners, this report was developed by the ULI Panel to review and comment on How Will We Grow? A Conversation with the Community.

The report included a general market analysis, planning and design, and implementation elements while applauding the critical steps the County is taking in developing a long term and strategic growth plan. The ULI Panel also commends the quality of work completed by staff in creating the How Will We Grow? A Conversation with the Community study, and it’s solid alternatives for the County to consider.

While the report dives deeper into the elements identified above, the key recommendations resulting from it included:

**Alternative 2 as developed in How Will We Grow is the most appropriate to achieve the County's goals and objectives however, all three alternatives are applicable.**

- How Will We Grow? is a strong base to create plans, policies, and implementation strategies for future grown within the geographic regions of the County.
- Establishing partnerships with the School Board and area universities should become a goal with focusing and improving outcomes of curriculum, knowledge, and skills for future jobs in sports, aviation, medicine, arts and sciences and supportive careers.
- Invest in market studies to identify specific strategies for investment at the K-13 and college levels which will further align education with employment, and to encourage investment that will stimulate reinvestment and redevelopment.
- IMG Academy maintains an international reputation and that should be leveraged to help brand Manatee County as “the sports training capital of America.”
- Extend the sports brand to medicine by attracting highly specialized sport injury treatment, rehabilitation and other performance enhancement, and medication practices and facilities.
- Focus infrastructure investment within the Southwest/Bradenton sector.
- Consolidate and expand current redevelopment areas to capture value that will be created within the Southwest/Bradenton sector.

The report also includes the ULI Panel’s finding that Manatee County must leverage its numerous and unique existing assets with new and/or more robust tools to attract and manage future growth. The key for the County will be to use those unique assets in a way to help guide growth that will serve diverse needs of residents while also creating a sense of place that will drive market demand and develop a future reputation.
1.3.4 WEST BUCKEYE PLAN

Presented formally to the Manatee County Board of County Commissioners in January 2006, the West Buckeye Plan was a coordinated effort by multiple property owners, consultants, and county staff to consider the overall impact and potential development west of I-75 and north and south of Buckeye Road.

Driven by three potential major development projects, Curiosity Creek, Newport Isles, and Sweetwater Preserve the potential for more than 5,000 residential units and 250,000 square feet of commercial use in the relatively undeveloped area of the County emphasized the need for a broader look.

Surrounding development projects in process at the time included Artisan Lakes and Stone Damn Preserve immediately south of the three primary projects, Wellington Lakes Manor adjacent to Stone Damn Preserve and immediately east of I-75, with Eagle Pointe adjacent to it. Two additional projects, Robinson Gateway and Cargor Property were also in conceptual development studies at the time. Combined, these projects were anticipated to add nearly 11,000 residential units with a projected population increase of nearly 25,000 and add more than 1,000,000 sq. ft. of commercial use.

The goal of the West Buckeye Study was to understand all of these collectively and consider critical elements for community development including circulation and connectivity, land use balance, parks/recreation/open space, civic space, sewer, educational needs, and how to implement these in a successful pattern.

Transportation was defined as a backbone element and included, within the overall area, a network of potential roadways and a Port Connector road. This helped create the framework necessary in the overall development plan view and incorporated additional uses to support this scale of development.

Using Manatee County Level of Service (LOS) standards, the development team incorporated dedicated land uses, either private or for future public dedication, to be used for public parks and private recreational facilities, greenway system, multi-use trail system, library and fire station sites, sewer easements, two elementary school sites, and one middle school site.
1.3.5 MPO LONG-RANGE TRANSPORTATION PLAN

Established by state and federal laws through interlocal agreements, Metropolitan Planning Organizations (MPO) within the state coordinate with the Florida Department of Transportation (FDOT), the Federal Highway Administration (FHWA), and the Federal Transit Administration (FTA), and serve as regional transportation planning entities. The MPO planning process is continually ongoing to meet current and projected population needs of that particular region. The Sarasota Manatee MPO includes both Sarasota and Manatee Counties, nine (9) cities and numerous unincorporated communities.

A critical function of the MPO’s is to identify and plan for long term needs within a region. The Sarasota Manatee MPO Long Range Transportation Plan (LRTP) identifies and assesses infrastructure improvements to the Sarasota and Manatee County transportation networks through the year 2040.

The overall area within this MPO is expected to experience a population growth of one (1) to two (2) percent per year, with Manatee County’s population expected to exceed 450,000 by 2040, and Sarasota County’s population expected to exceed 500,000.

The trends in population growth continue to see an aging retiree population moving to the area. Estimated by the University of Florida Bureau of Economic and Business Research it is expected that by 2040, three (3) or four (4) out of every ten (10) people living in the region will be over 65.

While much of this population growth is projected to occur east of I-75 in entitled or anticipated new greenfield development, the greatest employment growth is anticipated west of I-75. As the population continues to grow eastward, this will further strain the region’s existing transportation network. It also underscores other planning efforts the County has completed in addressing the changing desires of younger generations, and the future needs of an aging population.

Takeaways on future growth within Manatee and Sarasota counties included in the Sarasota/Manatee 2040 Strategic Mobility Plan include:

- Population growth and employment growth not likely occurring in the same area
- Older, wealthier, and more ethnically diverse community forecast with a persistent lower-income divide
- Potential for large shifts in transportation mode demands with aging population and millennials
- Stable economy and growth in white-collared professions
- Significant changes in travel demand across modes

A major aspect of the Long-Range Transportation Plan (LRTP) is identifying current and future transportation needs for the counties based on the projected...
to transportation demand, future plans are also developed considering the environment and public health, equity and access to opportunity, freight mobility, and economic development. In total, the Needs Plan reflects $2.5 billion in needed transportation investment through 2040.

While this is a significant amount reflecting some 49 roadway projects, there is fairly limited need identified within the study area in comparison to other portions within the MPO’s region. However, those that have been identified are critical to continue future growth of the study area.

Improvements identified within the 2040 Needs Plan within the general study area include:

- Expansion of Moccassin Wallow Road west of I-75 from two to four-lanes
- Construction of a two-lane road from Moccassin Wallow Road north as a western parallel to I-75
- Construction of a four-lane road from the port area extending east to I-75 and beyond

As the MPO places significant attention to continued economic development within the region, two longer term critical projects are the:

**Port Manatee Connector**

The Port Manatee Connector is a proposed high-speed connection linking Port Manatee to Interstate 75 and a new or improved interchange on I-75 with potential improvements to local roads in the area to provide necessary infrastructure to aid in the development of the port.

**EZ Flyover / East-West Connector**

The EZ Flyover is a proposed flyover/grade separated roadway across US 41 linking Port Manatee and the Port Manatee Encouragement Zone. This will eliminate trucks having to leave and re-enter the port security area and the breaking down of loads to conform to weight restriction on US 41. This will expedite truck movement and reduce the cost of handling shipments through the County.
1.3.6 FDOT ADOPTED FIVE YEAR WORK PROGRAM FISCAL YEARS 2019-2023

The Florida Department of Transportation’s (FDOT) mission is to provide a safe, interconnected statewide transportation system for Florida’s citizens and visitors that ensures the mobility of people and goods, while enhancing economic prosperity and sustaining the quality of our environment. FDOT’s role in the state extends beyond roadways, and as a department it has a critical responsibility for economic development and expansion within the state. The department’s Office of Freight, Logistics and Passenger Operations is tasked with meeting various state and national requirements for freight logistics and movement.

In support of meeting future growth and economic development, the state has established the Florida Strategic Intermodal System (SIS). Within the state designated SIS facilities include commercial airports, a general aviation reliever, two spaceports, deep-water seaports, freight terminals, rail corridors, highways, connectors, and waterways.

Recognizing the significance of Port Manatee, the FDOT is working through various grant mechanisms with the Port in making improvements to the general Port area. These include the resurfacing of Piney Point Road and design plans for restructuring the intersection of Moccasin Wallow Road and US 41.

The FDOT has also included within their Adopted Five-Year Work Program (2019-2023) projects that will meet current needs and further enhance the viability of the area:

- Port Manatee Cold Storage Warehouse Improvements $25,000,000
- Add Turn Lanes at Moccasin Wallow and US 41 - $516,963
- I-275 SB to I-75 NB Deck Repair- $319,050
- I-75 at Moccasin Wallow Rd Interchange Landscaping - $215,000 & $1,308,010
Recognizing the importance mobility has on economic development, the Florida Department of Transportation (FDOT) plays a vital role in the State’s ongoing economic growth. Emphasizing this, Florida House Bill 599 requires that FDOT “enhance the integration and connectivity of transportation systems across and between transportation modes throughout the State.” Through the Office of Freight, Logistics and Passenger Operations, the Office is working to meet the requirements within HB599, and also meeting national freight guidance as established in the Moving Ahead for Progress in the 21 Century Act (MAP-21).

In support of this, the Department established a Freight and Logistics Overview for Manatee County in 2013 that explored the County’s major industries, employers, and transportation and freight facilities, and provided a consolidated report for evaluation, use, and planning.

Overview

Manatee County supports a booming tourism and retirement industry with nearly half of the workforce employed in local service or retail trade. According to the Overview, administrative support, water management, and remediation services is the fastest growing industry followed by the agriculture, forestry, fishing, and hunting; educational services; health care and social assistance; and information industries. Manatee County’s largest industry sectors by employment are trade, transportation, utilities, education, health services and professional and business services. The largest private sector employers in the County are Manatee County School Board, Tropicana Products, Inc., Bealls, Inc., Manatee Memorial Healthcare System, and Blake Medical Center.

The County is also home to several significant transportation and freight facilities which are part of the State of Florida’s Strategic Intermodal System (SIS). The SIS is a statewide network of regionally significant multi-modal transportation facilities which move a majority of people and goods throughout the State of Florida. I-75, I-275, US 41, US 301, and SR 70 are all part of the State’s SIS Highway System and CSX Transportation is part of the State’s SIS Railroads system.

Sarasota/Bradenton International Airport is designated as a SIS airport and Port Manatee is a SIS Seaport. Manatee County’s top freight imports include petroleum or coal products, nonmetallic minerals, bulk movement in boxcars, food or kindred products, clay, concrete, glass and stone. Manatee County’s top imports trading partners range from Galveston County, Texas; Jackson County, Mississippi; St. James Parish, Louisiana; Hillsborough County, Florida, and St. Charles Parish, Louisiana. Top freight exports include farm products, bulk movement in boxcars, nonmetallic minerals, clay, concrete, glass and stone, and food or kindred products. Manatee County’s top export trading partners include Miami-Dade County, Florida; Pinellas County, Florida; Sarasota County, Florida; Lee County, Florida, and Hillsborough County, Florida.
In 2005, a Port Manatee Connector Feasibility Study analyzed the need for transportation improvements between Port Manatee and I-75 that supported the need for a connector and identified six viable corridors for further study.

In May of 2008 the Florida Department of Transportation (FDOT) with the Federal Highway Administration (FHWA) initiated the Port Manatee Connector Project Development and Environment Study (PD&E). The study included an analysis of various alternatives for enhanced access between Port Manatee and I-75. To meet the objective of creating a connector the improvement may have required upgrades to existing roadways and alternatives on a new east-west alignment.

The area included within the Port Manatee Connector PD&E Study generally extended from I-275 to State Road 674 and from I-75 west to the Tampa Bay coastline in northern Manatee County and southern Hillsborough County.

As the fourth largest deepwater seaport in the state of Florida and, along with I-75, Port Manatee is a part of the Florida Strategic Intermodal System (SIS). At the onset of the PD&E study, Port Manatee was managing over five (5) million tons of agricultural and industrial imports annually. A direct connector would enhance the intermodal connectivity to the Port therefore improving the efficiency for transport. This would result in greater regional connectivity, mobility, accommodate future traffic needs, support regional and statewide economic development, and provide an additional evacuation route.

The Project Need Statement identified the “Port Manatee Connector is supported by local, statewide and national land use, economic and growth objectives based on various factors including modal interrelationships, system linkage, port growth, travel demand, government authority, social and economic growth, the capacity of the existing roads, and safety and evacuation.”
Eight specific elements were included in support of the Project Need:

Modal Interrelationships
Port Manatee is the closest United States deepwater seaport to the Panama Canal. Efficient connectivity between the Port and I-75 will benefit the marketplace.

System Linkage
At the time of the PD&E study, 75 percent of the truck traffic leaving the Port used I-75. A direct connector circumventing travel north or south on US 41 to an existing east west roadway would improve that travel route and enhance regional connectivity.

Economic Development at Port Manatee
Facility expansion, adjacent commercial and industrial development opportunity, and the expansion of the Panama Canal were identified as factors that will increase the economic development of the Port. In support of this, efficient movement of goods and people were considered essential.

Transportation Demand
The PD&E identified the connector would be consistent with the 2030 SIS Multi-Modal Unfunded Needs Plan, the 2030 Sarasota-Manatee Metropolitan Planning Organization Long Range Transportation Plan Cost-Feasible Plan, and the Manatee County Comprehensive Plan. The study did identify that while Manatee County plans support the connector, Hillsborough County officials did not support a connector within southern Hillsborough County.

Social Demands and Economic Development
Projected population demands and available surrounding land with approved residential development and increased economic growth would require increased roadway capacity.

Capacity
With the majority of goods distributed through freight traffic, the Port’s future economic success is dependent on additional roadway capacity to the existing network.

Safety and Emergency Evacuation
In addition to improving traffic flow and safety, a connector would enhance evacuation capacity.

Current Status
On September 11, 2014, FDOT District Secretary Billy Hattaway wrote a letter to Commissioner Larry Bustle, Chairman of the Sarasota/Manatee MPO to cease studies related to the Port Manatee Connector. This letter cited LRTP updates which projected reduced traffic volumes and growth projections for the project, making the need for a Port Connector unnecessary at the time. The letter did propose that at which point land use and population growth projections increased the need for a connector, the PD&E study should be re-programmed.

Alternatively, Manatee County has retained a Piney Point Road extension on its future transportation map in the Comprehensive Plan.

Federal, State or Government Authority
The connector would enhance trade transportation networks statewide and internally which is consistent with the national objectives to increase global economic activity.
The Bradenton Area Economic Development Corporation (BAEDC) is the lead economic development organization for the Bradenton Area and the communities located south of Tampa Bay. Consistent with most Economic Development Councils, their goal is to continue diversifying the local economy, retaining existing jobs, and attracting additional high-wage jobs for its residents. It also works to connect existing businesses to resources that can help them succeed.

The BAEDC works with other economic development partners within the region including public sector partners and private businesses. The organization’s multi-year strategy for increasing business diversity aligns the community’s existing assets with business sectors that currently exist within Manatee County.

Working with Boyette Strategic Advisors, the BAEDC undertook an extensive effort combining demographic and employment data and research with extensive participation from civic leaders, businesses, young professionals, government officials, educators and other stakeholders to develop a strategic plan. The Build Bradenton Area Plan, containing bold initiatives, was unveiled in August 2015 for Manatee County’s future as the business destination for the South Tampa Bay region.

The strategic plan in its analysis of Manatee County’s ability to rank as a location for companies in high-growth business sectors, and determined which industry sectors should be targeted for recruitment. The plan also included opportunities to make the community more appealing for expansion or relocation.

Designed to be implemented in partnership with other allied agencies, organizations, and individuals, the EDC is working to implement the plan and continues raising funds to support this effort.

Key recommendations of the plan include:

**Foster Entrepreneurship and Innovation**
- Create an entrepreneurial ecosystem
- Develop the Village of Innovation in Downtown Bradenton

**Create a Compelling Quality of Place**
- Enhance and expand culinary scene/food destination close to the Village of Arts
- Establish a “world-class” dog park
- Connect cultural advantages and opportunities for Manatee County through the expansion of Realize Bradenton
- Address workforce housing
- Update and implement Downtown by Design for the City of Bradenton

**Advance Business Competitiveness**
- Understand assets and challenges of target sector opportunities
- Engage in targeted lead generation
- Become a significant player in developing a
life sciences hub for Florida’s West Coast
• Develop the best sports performance sector in the country including developing a cluster of related businesses in and around the IMG Academy campus in West Bradenton
• Capitalize on the assets of the region’s institutions of higher learning
• Develop a transportation plan
• Expand existing convention center in Palmetto with hotel development
• Explore resort hotel/conference center developments
• Develop a distribution and logistic business park at Port Manatee to provide a focus for marketing available land adjacent to the port

In addition to Key Recommendations, performance targets were also established for the following four years, or 2016 – 2020
• 62 Business expansions and relocations
• 4,000 Jobs retained or created
• 11 Startups established
• $460 Million in capital investment

Communities included within the BAEDC are: Anna Maria, Bradenton, Bradenton Beach, Ellenton, Holmes Beach, Lakewood Ranch, Longboat Key, Palmetto, Parrish and unincorporated Manatee County.

In addition to Key Recommendations, performance targets were also established for the following four years, or 2016 – 2020

Increase Focus on Workforce/Talent Retention and Development
• Ensure workforce/talent is available to support target sector opportunities
• Ensure workforce/talent and training are available to support needs of existing businesses
• Support a collaborative education environment
• Explore ways to develop and maintain Information Technology talent

Build the Bradenton Area Brand
• Enhance the perception of the Bradenton area through a new branding campaign and messaging
• Maximize impact of social media among key target audiences
• Showcase unique Bradenton area assets in marketing efforts

Enhance and Promote Sustainability
• Inventory and market the Bradenton area’s sustainable assets
• Incorporate sustainability into the Bradenton area’s economic development efforts

Expand Economic Development Resources
• Explore a new funding model
• Assess staffing needs
• Review and expand current services
• Encourage county alliances and explore regionalism

BAEDC Targets
source: BAEDC
1.3.10 PARKS, RECREATION AND OPEN SPACE MASTER PLAN

In 2017, the Manatee County Parks and Natural Resources Department, in conjunction with Planning and Infrastructure Staff and the consultant team of Kimley-Horn, Barth Associations, Perez Planning & Design, LLC, and PROS Consulting, drafted the Manatee County Parks, Recreation, and Open Spaces (PROS) Master Plan. The Master Plan identifies public facility needs and opportunities for continued success related to the County’s parks, preserves, and open spaces.

This report divided Manatee County into four distinct quadrants, the northwest, northeast, southwest, and southeast quadrants in order to explore the County’s existing park infrastructure as well as identify potential facility needs based on projected population growth in each quadrant.

Overall the PROS Master Plan concluded that Manatee County’s parks and natural resource system are in relatively good health, but anticipated shifts in population growth will result in an increased need for new parks and the increased maintenance of existing facilities.

While the PROS Master Plan explored parks and anticipated population growth in the northwest quadrant of Manatee County, no existing or planned facilities were analyzed within the Northwest County primary study area.
1.4.0 DEVELOPMENT CONDITIONS

INTRODUCTION

Existing conditions within the primary study area were reviewed specific to existing natural conditions, adjacent development activity and anticipated known projects. Additionally, this section includes an analysis of Manatee County’s local sales tax option that includes specific planned improvements and projects that would impact the primary study area.

This section also explores influences beyond the defined primary study area that should be considered due to their impact on future development of the overall study area. The following section provides an overview of:

- Primary Study Area Tiers
- Contributing Factors
- Environmental Conditions
- Development Approvals, Entitlements & Infrastructure Improvements
- Existing Land Ownership
- Infrastructure Sales Tax Projects
- Stakeholders
1.4.1 PRIMARY STUDY AREA TIERS

Encompassing approximately 6,737 acres, the Northwest County study area is more easily explored when divided into distinct areas. For analysis of land use, infrastructure, and economic forecasting, the study area has been divided into three tiers.

Tier 1 bounds US 41 on both east and west sides, and includes approximately 3,536 acres of land comprised of Port Manatee, several developed industrial sites, the Piney Point Gypsum Stacks, many smaller parcels. This area includes the greatest amount of existing utilities.

Tier 2 comprises the middle portion with roughly 1,455 acres. This tier generally consists of agricultural uses.

Tier 3 abuts I-75 and includes approximately 1,746 acres of largely agricultural uses. This tier also includes several smaller “ranchette” parcels that are primarily residential uses.
1.4.2 CONTRIBUTING FACTORS

In the general overview of the Northwest County primary study area, it is important to consider contributing factors outside of the defined primary study area that have the potential to influence future development of the area. There are multiple factors that present both challenges and opportunities for Manatee County in the ultimate build out of this area. These factors include proximity to a major roadway network, residential development pressure from within Manatee County to the south and east, and development pressure coming from Hillsborough County to the north.

Roadway Network

The area’s proximity to major thoroughfares such as US 41, I-75, I-275 and US 301 gives easy access to the downtown Tampa and St. Petersburg employment centers. Unfortunately, this could make the Manatee area a bedroom community that simply serves those employment centers since living in Manatee County while working in other counties is a reasonably easy commute via the surrounding roadway network. While housing options exist near these major employment centers, a common perception, accurate or not, is that housing is more attainable in Manatee County.

Development Pressure from Outside Manatee County

Manatee County has experienced a consistent annual growth rate of around 3% for the last several years. While the county ranks among the top Florida counties attracting retirees, it is also attracting a younger demographic as well. In addition to new growth from other regions in Florida and beyond there is also growing pressure from other areas within Manatee County and those adjacent to it.

It is widely discussed among regional residential developers that adjacent Pinellas and Hillsborough Counties have limited quality residential sites remaining within their Urban Service Boundaries. The lack of quality sites in those counties as the potential to push residential development into Manatee County and further north into Pasco County. Pasco County has long been considered the bedroom community to the Tampa employment center. It now appears that northwest Manatee County has become equally attractive for the same reasons - available, quality sites of significant size with close proximity to a major roadway network.

The general study area abuts the Manatee/Hillsborough County line with lands to the north falling outside of Hillsborough County’s Urban Service Boundary (USB). Hillsborough’s current USB line meanders along the Little Manatee River approximately 1.5 to 4.25 miles north of the Manatee County line; this leaves a large geographic area outside of Hillsborough County’s USB which reduces its ability to provide quality developable lands to support industrial and Port related development. At this time there is no direction from Hillsborough County leadership to expand the USB to the Manatee County line. However, Hillsborough County City-County Planning Commission staff is currently engaged in on-going studies relative to the County’s growth and the need for expansion areas to accommodate the anticipated 600,000+ new residents.
expected to arrive in the County by the year 2040.

Not only does Hillsborough County’s lack of available residential parcels have some bearing on the study area, so does their lack of land for large scale industrial and heavy commercial users. There are a limited number of single ownership tracts in Hillsborough County that can accommodate large scale users. This may be a positive factor for Manatee County in the future and even more so should access to I-75 be improved.

Little Manatee South Community Plan (LMSCP)

Hillsborough County creates community plans to examine unique characteristics of communities and issues within these distinct geographic areas. After a lengthy community engagement process, the community plans are adopted as part of the County’s Comprehensive Plan to provide guiding principles for existing and future development patterns. Lands directly north of the primary study area are within the LMSCP that was adopted in 2010, and covers almost 23,000 acres of land. The LMSCP takes into account BOTH the area’s proximity to Manatee County and the development pressure lands to the south were experiencing and the area’s proximity to Port Manatee.

Of the 23,000 acres included in the LMSCP, approximately 6,000+ acres are considered developable and the remaining lands are developed in a low-density residential pattern or are non-residential uses generally associated with agricultural uses. Additionally, the area includes large tracts of conservation lands under governmental control. The LMSCP envisions the need for more urban form and activity centers to cluster development and respect the agricultural and environmental characteristics of that area. Yet the plan also discusses potential inclusion of the area into the Hillsborough County USB in order to meet growth thresholds anticipated by the year 2040.

Two-thirds of the 6,000+ acres of the LMSCP belong to common ownership which allows for a unified development approach that can promote employment centers and a variety of residential products. Those employment/activity centers allow for light industrial, warehouse, and office uses at a maximum Floor Area Ratio of 0.25 which is far less than allowed in the Northwest Manatee primary study area. These centers would provide opportunities for job creation “that can take advantage of the economic engine of Port of Manatee” and “create opportunity for spin off activities from the Port activities”. Specifically, an employment center is envisioned to be located at Valroy Road and US 41 which is as close, if not closer, to Port Manatee than many of the vacant lands within the primary study area.

The LMSCP also references the need for roadway connectivity within the area and the potential for a new I-75 interchange. The Manatee County Thoroughfare depicts Artisan Lakes Parkway as a north-south corridor which could potentially provide a connection to Valroy Road in Hillsborough County, allowing for additional connectivity.
It is important to note that while the LMSCP anticipates development in south Hillsborough County, there is still a lack of public utility infrastructure to serve the area. Development must be supported by the extension of public utilities at the developer's expense. This presents a challenge to near-term future development of the area. There are options for providing public services, but they will require significant effort through public-private partnerships.

Residential Development within Manatee County

The study area is also influenced by residential pressure from lands south of Buckeye Road / Moccasin Wallow Road and lands east of I-75 along the Moccasin Wallow Road corridor. In general, residential development south of the primary study area typically consists of smaller subdivisions, mobile home and RV parks with minimal non-residential uses. Two exceptions of large master planned developments are located at the I-75 and Moccasin Wallow Road interchange. There are very few undeveloped parcels of any size in this area.

The Moccasin Wallow Road corridor east of I-75 has experienced significant residential / mixed-use development pressure in recent years. Currently there are 15,000+ residential units and 3,000,000+ square feet of commercial uses entitled, in the entitlement process or under construction along this corridor. The vast majority of parcels from Erie Road north to Moccasin Wallow Road and from Moccasin Wallow Road almost to the County line, has some level of entitlement / development activity. There are multiple thoroughfares that are planned and/or being constructed in the area to facilitate this anticipated growth. In fact, developers have applied, though unawarded, for a state grant to assist with the expansion and ultimate build-out of Moccasin Wallow Road in order to proactively address the needs of this growing community.

In years past, large tracts east of I-75 and north of Buckeye Road seemed destined for anticipated residential development. During the market downturn those parcels were allowed a dual entitlement of both residential/commercial and/or light industrial uses – or some combination thereof. Currently, some of these parcels are rumored to be under pressure to sell for residential development in the near term versus waiting for the long-term potential of industrial buyers.

![Map 14: Study and Surrounding Area Potential Development](image-url)
1.4.3 ENVIRONMENTAL CONDITIONS

A cursory review of the Northwest County primary study area was completed to identify environmental constraints such as major wetland systems and areas of environmental concern. Based on a review of the Florida Department of Transportation (FDOT) District 1 Port Manatee Connector PD&E Study, conducted in July 2008 (1), the southern portion of the PD&E study area within Manatee County mainly consists of agricultural, extractive, transportation, and commercial land uses. There are also some high and medium density residential, upland forest, and wetland land uses in the area. Agricultural lands within the area consist of crop and pastureland, tree crops, and row crops. There are no prime or unique farmlands. The study area includes estuarine, palustrine, and lacustrine wetland systems that could be impacted by linear development between Port Manatee and I-75. However, the estuarine portion of the study area is part of the Terra Ceia Aquatic Preserve, which is classified as an Outstanding Florida Water (OFW). Since the purpose of this study is in relation to the commercial and industrial development of the Northwest County, the environmental constraints and concerns identified herein are focused primarily on the landward extent of the study area and do not include the Terra Ceia Aquatic Preserve and the state-owned lands bordering it. The land use classifications for most of the wetlands in the study area are wetland forested mixed and freshwater marshes. Based on a review of aerials from the National Wetland Inventory (NWI), an extensive, contiguous area of palustrine forested mixed wetlands bisects the primary study area in Tier 2 and extends partially into the east side of Tier 1. Most of this wetland corridor is owned by Manatee County, while the remaining extents are located on adjacent private properties. The wetlands throughout the remainder of the study area are mostly isolated and are scattered throughout the area.

Based on the PD&E Study, protected bird species such as the bald eagle, wood stork, scrub jay, mangrove cuckoo, and black-whiskered vireo are likely to inhabit and/or utilize the study area. The study area also encompasses suitable habitat types for protected species such as the eastern indigo snake, gopher tortoise, and Florida manatee. Several protected plant species may also be found in the area, such as the giant orchid and sand butterfly pea. There are also lands within the study area that have been identified by the Nature Conservancy as an Ecological Resource Conservation Area, Environmentally Sensitive Index Coastal Mangroves, and isolated areas with potential impacts to protected species occurrence on public lands due to prescribed burning of pinewood forest.

A preliminary contamination screening report for the PD&E study, dated December 19, 2008, by Tierra, Inc. was also reviewed to identify potentially contaminated sites within the primary study area that could impact development. The table below summarizes all identified sites in the PD&E that are in the Northwest Manatee County Study Area and are ranked as either medium or high-risk sites. Medium risk sites are sites in which indications were found that identify known soil and/or water contamination which does not need remediation, is being remediated, or requires continued monitoring. High risk sites are those

<table>
<thead>
<tr>
<th>Site</th>
<th>Address</th>
<th>City</th>
<th>ID Number</th>
<th>Concerns</th>
<th>Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td>Goodson Farm Lemon Grove</td>
<td>West end of County Line Rd. Palmetto, FL 34221</td>
<td>298736866</td>
<td>UST List, 2 active ASTs. No issues reported. Grove activity may result in residual pesticide/herbicides in the soil.</td>
<td>Medium</td>
<td></td>
</tr>
<tr>
<td>Piney Point Phosphate</td>
<td>13300 US Hwy. 41 Palmetto, FL 34221</td>
<td>419807786</td>
<td>CERCLIS, TRS, ERLS, AIRS, UST, RCRA - Former fertilizer manufacturing facility. Bulk storage of sulfuric and phosphoric acids, molten sulfur, ammoniated phosphate fertilizer, phosphogypsum stacks and acid process water in the gypsum stacks. Groundwater Contamination under Buckeye Rd is present.</td>
<td>Medium</td>
<td></td>
</tr>
<tr>
<td>Commercial Carrier Corp.</td>
<td>12205 N. US Hwy. 41 Palmetto, FL 34221</td>
<td>418624126</td>
<td>LUST 6 UST removed from site. Site Rank is 5. Has 1 active AST 20000 Diesel and 1, 3000g waste oil tanks. No assessment data available to date.</td>
<td>Medium</td>
<td></td>
</tr>
<tr>
<td>Various Agricultural Sites</td>
<td>Various locations N/A N/A N/A</td>
<td>N/A</td>
<td>Residual pesticide/herbicide in soils from grove, row crop, and turf farming activities are a concern.</td>
<td>Medium</td>
<td></td>
</tr>
</tbody>
</table>

Table: 3 - Environmental
sites in which there is a potential for contamination issues and circumstances may require screening assessments (i.e., soil and water sample laboratory analysis). There were no high-risk sites identified within the Northwest Manatee County study area, however, several medium risk sites of concern were identified.

A large portion of northwest Manatee County is comprised of agricultural lands, which are often ranked as Medium risk sites due to prolonged periods of pesticide and herbicide usage which can accumulate in soils and present environmental concerns. These sites often require additional field screening to determine if the site has been impacted.

The contaminant site of highest concern to the Northwest Manatee County Study Area is the Piney Point facility now owned by HRK Holdings LLC, located at the northeast corner of US Highway 41 and Buckeye Road. The Piney Point Phosphate Plant is a CERCLIS site that has become a prominent environmental concern of the Tampa Bay area in regard to the billions of gallons of acidic wastewater stored atop on-site gypsum stacks. In the early 2000’s, there was great concern over these stacks and the potential leaking or overtopping of wastewater that was being contained. Ultimately, the phosphate plant became unable to adequately treat the volume of wastewater being generated, which resulted in on- and off-site groundwater contamination that is still under remediation.

Groundwater contamination at Piney Point extends off the site in the northeast corner of the property and the southern property boundary along Buckeye Road. The northeast corner is contaminated with elevated concentrations of sodium, sulfate, nutrient, TDS, and radionuclide, which extend approximately 400 feet off site. It is believed that the contamination on the northeast corner of the site was a result of groundwater gradient changes associated with seepage ditches that were improperly operated. The southern property boundary is contaminated with elevated concentrations of TDS, sodium, sulfate, ammonia, nitrogen, and arsenic and extends from the southwestern corner of the old gypsum stack underneath Buckeye Road and into the Florida Power and Light easement on the south side of Buckeye Road within a 300-foot section. Groundwater contamination along the southern boundary of the property was caused by the inadvertent backfilling of a portion of seepage ditches along the toe of the old gypsum stack which caused the groundwater levels to increase above historical operating levels.

The environmental constraints identified in this review that are likely to cause the greatest hindrance to future development are the contiguous wetland system that bisects the Northwest Study Area in Tier 2 and the groundwater contamination at Piney Point. The contiguous wetland system in Tier 2 poses the greatest limitation to the construction of additional roadway and utilities corridors across the area. However, existing roads/utilities extend through the wetland system, so residential and commercial development to either side of this wetland system is practicable. Should impacts to the wetland in Tier 2 be necessary, compensatory wetland mitigation can be provided to offset the functional loss either through the purchase of mitigation credits from a mitigation bank or via on-site wetland creation, restoration, and/or enhancement. Although the Piney Point groundwater contamination is of large concern to the Tampa Bay area, the site is currently under remediation. Other than the properties adjacent to the contaminated site, Piney Point is not expected to have much impact on the overall development of the Northwest Study Area.

Therefore, while there are numerous environmental considerations within the primary study area, there are no significant environmental barriers to further development of the area.

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1 At the time of this review, the most recent primary source of data available was the Florida Department of Transportation (FDOT) District 1 Port Manatee Connector PD&E Study that was conducted in July 2008. Although the FDOT PD&E study is slightly dated, the data provided relative to the overall wetlands and general land uses is unlikely to have changed with any significance in the past decade. Wetlands can alter over time, but based on historical aerial imagery, the major wetland systems and wildlife corridors within the study area do not appear to have changed substantially since the 2008 FDOT PD&E Study was published.
1.4.4 DEVELOPMENT APPROVALS AND ENTITLEMENTS

Within the Northwest County area there are a number of projects, residential and/or commercial that currently have approval at various stages for development, or are in the process of seeking approvals.

Activity beyond the primary study area boundary is important to understand. The following map and table identifies these projects as commercial, mixed-use, or residential.

Based on this and with the assumption that these projects will be fully built-out, there could be nearly 7.1 million additional square feet of commercial use and 10,000+ residential units within the overall study area.

Projected commercial development in the primary study area comprises nearly 4.8 million square feet and 5,200+ residential units. Beyond the primary study area, an additional 2.3 million square feet of commercial development and 5,100+ residential units would be developed.
<table>
<thead>
<tr>
<th>Symbol</th>
<th>Development</th>
<th>Commercial Sq. Ft.</th>
<th>Residential Dwellings</th>
<th>Development Acreage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Eastern Cement Expansion</td>
<td>4,408</td>
<td>-</td>
<td>6.04</td>
</tr>
<tr>
<td>2</td>
<td>Vecenergy - Port Manatee Terminal</td>
<td>3,200</td>
<td>-</td>
<td>247.00</td>
</tr>
<tr>
<td>3</td>
<td>The Preserve at Bishop Harbor</td>
<td>-</td>
<td>66</td>
<td>82.92</td>
</tr>
<tr>
<td>4</td>
<td>Wilkens and Jenkins</td>
<td>7,800</td>
<td>-</td>
<td>18.57</td>
</tr>
<tr>
<td>5</td>
<td>FB Energy Manatee Facility</td>
<td>28,400</td>
<td>-</td>
<td>49.55</td>
</tr>
<tr>
<td>6</td>
<td>GSI Shop</td>
<td>5,000</td>
<td>-</td>
<td>8.39</td>
</tr>
<tr>
<td>7</td>
<td>Robbins One</td>
<td>10,700</td>
<td>-</td>
<td>8.49</td>
</tr>
<tr>
<td>8</td>
<td>Calcutta Marine</td>
<td>9,900</td>
<td>-</td>
<td>2.33</td>
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<td>Palmetto Plaza</td>
<td>6,000</td>
<td>-</td>
<td>9.40</td>
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<tr>
<td>10</td>
<td>Blue River Farms</td>
<td>-</td>
<td></td>
<td>2.59</td>
</tr>
<tr>
<td>11</td>
<td>Popi's Plaza</td>
<td>11,370</td>
<td>-</td>
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<tr>
<td>12</td>
<td>Schwab Ready Mix at Harlee Rd.</td>
<td>5,025</td>
<td>-</td>
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<tr>
<td>13</td>
<td>Heron Bay</td>
<td>-</td>
<td>196</td>
<td>37.95</td>
</tr>
<tr>
<td>14</td>
<td>Sarasota Land Serv. Hwy 41 Storage</td>
<td>5,700</td>
<td>-</td>
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<tr>
<td>15</td>
<td>MC Warehouse Freezer</td>
<td>12,226</td>
<td>-</td>
<td>1.00</td>
</tr>
<tr>
<td>16</td>
<td>Moccasin Village</td>
<td>-</td>
<td>72</td>
<td>9.66</td>
</tr>
<tr>
<td>17</td>
<td>Buckey Industrial Park</td>
<td>845,000</td>
<td>-</td>
<td>93.59</td>
</tr>
<tr>
<td>18</td>
<td>Manatee Animal Hospital &amp; Emergency Clinic</td>
<td>5,200</td>
<td>-</td>
<td>1.49</td>
</tr>
<tr>
<td>19</td>
<td>Reeder Snell Industrial Park</td>
<td>3,500,000</td>
<td>-</td>
<td>341.11</td>
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<tr>
<td>20</td>
<td>Country Walk Estates</td>
<td>-</td>
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<td>21</td>
<td>Mandarin Grove</td>
<td>-</td>
<td>301</td>
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</tr>
<tr>
<td>22</td>
<td>Vorbeck at Moccasin</td>
<td>-</td>
<td>720</td>
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</tr>
<tr>
<td>23</td>
<td>Woods of Moccasin Wallow GDP</td>
<td>459,626</td>
<td>103</td>
<td>198.83</td>
</tr>
<tr>
<td>24</td>
<td>Land Trust 32/88 Acres</td>
<td>-</td>
<td>206</td>
<td>83.33</td>
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<tr>
<td>25</td>
<td>Artisan Lakes</td>
<td>1,803,200</td>
<td>2,800</td>
<td>1,032.05</td>
</tr>
<tr>
<td>26</td>
<td>Curiosity Creek</td>
<td>150,000</td>
<td>1,594</td>
<td>807.89</td>
</tr>
<tr>
<td>27</td>
<td>Stonedamm Preserve</td>
<td>9,000</td>
<td>791</td>
<td>410.91</td>
</tr>
<tr>
<td>28</td>
<td>Newport Isles</td>
<td>60,000</td>
<td>1,663</td>
<td>740.47</td>
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<tr>
<td>29</td>
<td>Sweetwater Preserve</td>
<td>150,000</td>
<td>1,719</td>
<td>823.22</td>
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<td><strong>Total</strong></td>
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<td><strong>5,248</strong></td>
<td><strong>3,337.76</strong></td>
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<td><strong>5,155</strong></td>
<td><strong>2,003.66</strong></td>
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<tr>
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<td><strong>Total</strong></td>
<td><strong>7,091,395</strong></td>
<td><strong>10,403</strong></td>
<td><strong>5,341.42</strong></td>
</tr>
</tbody>
</table>

Table: 4 - Approved Development Entitlements

Bold represents projects outside the study area.

The potential for significant residential and commercial development within the study area is substantial. Most of what has been approved or is in the process of approval includes a residential and commercial mix. This type of development would create conflict with significant future industrial development and expansion. Note that these numbers reflect maximum approved concurrency levels and do not necessarily reflect what will be built.
1.4.5 EXISTING LAND OWNERSHIP

Within the Northwest County area there are 93 parcels that comprise the identified primary study area. Within Tier 1, many of these are smaller parcels that have a range of existing and allowable uses and largely located in close proximity to Moccasin Wallow Road and US 41. There is only one large easily accessible undeveloped tract under single ownership that lies east of US 41 at the County line that has received zoning and site plan approval for a light industrial subdivision.

In contrast, Tiers 2 and 3 have several larger parcels that are primarily owned by three corporations that may have a significant influence on future development of this area. These parcels total slightly more than 2,350 acres, or nearly 75% of the acreage within those tiers. The parcels have much to offer toward industrial development due to their acreage size and their current status of zoning approval allowing greater flexibility than most parcels. There are also a few smaller parcels just north of Buckeye Road in close proximity to these larger sites that could provide additional flexibility to future industrial uses.

The large parcels in all tiers are both an opportunity and potential challenge in the future. Regardless of the number of programs or incentives Manatee County may put in place, property owners ready and willing to sell must also have realistic market expectations that development will support. With the larger landowners, there is understandably significant pressure during a strong housing market to sell for profits with a much quicker return than waiting for an undetermined long-term for industrial profits. The Tiers 2 & 3 parcels need public infrastructure in order to see industrial profits in the short term. Without the public investment, industrial buyers may not surface in the near future. This may open the door to residential pressure taking precedent over future industrial uses; thereby losing a large quantity of industrial expansion lands.
Like most of coastal Florida, Manatee County experienced significant increases in real estate values by 2006. To minimize an increase in costs to residents of Manatee, the County maintained a flat tax rate the following years, and as the housing market collapsed and real estate values plummeted, they continued to maintain the same tax rate to ease the burden on property owners. The result was a drastic reduction in operating revenue for the County which led to many projects being delayed or canceled and a significant reduction in staff to manage County needs. Meanwhile the population within the county continued to increase and an ever-growing strain on resources and infrastructure mounted.

As the real estate market and general economy began to improve, many communities were faced with a tremendous backlog of projects that had been delayed along with unmet newer needs resulting from continued growth. Like other Florida counties, Manatee County, based on the recommendation from a Citizens Financial Structure Advisory Board (CFSAB) placed a half-cent infrastructure Sales Tax (IST) referendum on the 2016 ballot. Estimated to generate $30 million annually, the ability to bond projects based on sales tax revenue to expedite implementation, and a primary allocation towards transportation related projects, Manatee County voters approved the referendum.

Several projects funded through the sales tax were identified to be completed within the Northwest County primary study area that included transportation and public safety, and further reviewed below.

**TRANSPORTATION**

**Moccasin Wallow Rd- US 41 - Ellenton-Gillette**

Reconstruct and widen existing two-lane road to a four-lane divided roadway with standard lane widths, pedestrian & bicycle facilities, and lighting.

**Cost:** $6,371,000  
**Construction:** 10/19 - 12/22

**Public Safety**

**Manatee County Sheriff’s Office – Jail**

The Manatee County jail was allocated funding within the sales tax for approximately 24 different projects within the jail and grounds.

**Cost:** $26,000,000+  
**Construction:** Ongoing

### 1.4.6 INFRASTRUCTURE SALES TAX PROJECTS

**Moccasin Wallow Rd- Ellenton Gillette-Gateway - 49th Ave East**

Reconstruct and widen existing two-lane road to a four-lane divided roadway with standard lane widths, pedestrian & bicycle facilities, and lighting.

**Cost:** $7,390,000  
**Construction:** 10/19 - 12/22

**TRANSPORTATION**

**Moccasin Wallow Rd- US 41 - Ellenton-Gillette**

Reconstruct and widen existing two-lane road to a four-lane divided roadway with standard lane widths, pedestrian & bicycle facilities, and lighting.

**Cost:** $6,371,000  
**Construction:** 10/19 - 12/22
In development of the Northwest County Plan, Redevelopment and Economic Opportunity (REO) Department staff have assisted in guiding this process. Lengthy conversations about the study area, its history, current status, programs and other County action implemented to support it, among other items, have helped to understand the broad picture. As a part of this process, it is important to understand the view that stakeholders have as well. The REO Department participated in a two-day workshop in which interviews and round-table discussions were held with stakeholder groups. The following offers a summary of the various stakeholder group discussions.

**Florida Power & Light**

Currently there is one substation in the area located at Buckeye Road and US 41. Future growth within the area would require an expansion of the existing substation or the potential for a second feeder connection from another nearby substation. FP&L currently has no plans to add a second substation in the area. If a prospective company required a second feeder as backup power, it would necessitate adding a second feed from the Rubonia substation some four or five miles south, and this would be at the cost of the prospective company. FP&L indicated that if upgrades become necessary, they could be accomplished in a relatively short time frame of six to eight months.

**Florida Department of Transportation (FDOT)**

The Department has worked closely with Port Manatee and has a current study on existing capacity and capacity improvements that can be made within the Port property through existing grants. FDOT is also working with the County to resurface Piney Point Road to better facilitate truck traffic and is working on design plans for restructuring the intersection of Moccasin Wallow Road and US 41.

FDOT would like to see an intermodal facility in the area and sees potential for CSX Railroad to increase interest in the area if Port activity increases. In conjunction with the Port, FDOT is monitoring growth of the Port and the general area to identify if traffic volumes merit re-initiating the Port Connector Study.

*Within FDOT is the Office of Freight, Logistics, and Passenger Operations that includes coordination and work effort among all freight facilities including highways, railroads, airports, and seaports.

**Metropolitan Planning Organization (MPO)**

The MPO maintains great interest and priority in meeting Port interests, including the current resurfacing of Piney Point Road and a future direct connection and interchange at I-75. Ahead of the 2045 Long Range Transportation Plan Update the MPO is concerned about the impact that future residential growth within the Study Area may have on the ability of the area to attract and develop an industrial component adjacent to Port Manatee, and subsequently growth of Port activity.

While efforts on existing roadways are underway in either planning or construction, the MPO does not see the widening of Moccasin Wallow Road as an alternative to a direct connection to the interstate due to the intermingling of domestic and truck traffic.

At this time, the MPO estimates that when or if demand necessitates an interchange at I-75 a minimum timeframe of 10 – 15 years would be required for completion and would likely cost $30 - $50 million. The MPO states that trucking rest stops along I-75 do not meet current demand within the State of Florida and particularly south of the I-4 corridor. It is anticipated that if an interchange were to be constructed, particularly as part of a direct connect to the Port that it would be an ideal location for a trucking rest stop.

**Businesses & General Land Owners within the Study Area (non-Port area)**

There is activity present in the primary study area, and predominantly adjacent to US 41.

Allied Technologies is developing a bleach plant just east of US 41 and is anticipating 30 trucks per day in and out of the facility once complete. There is a concern on the existing condition of Moccasin Wallow Road and its ability to adequately carry truck traffic. Vecenergy would like to rezone the southern portion of their property to Industrial Heavy yet believes a conservation easement to the west will prohibit that. They imagine a future loop road from Reeder Road to Armstrong Road. An RV community and bar/lounge are also beginning construction just east of US 41 also south of the Port.
A resident of Piney Point Road expressed support for the Port while wanting to maintain the residential lifestyle that currently exists along the roadway.

In general, the views from businesses and landowners outside of the Port boundary is broad, and includes:

- The Port container yard is full and needs to expand
- The Port is not a large export facility and is primarily for imports
- The Port does not have a funding mechanism similar to Port Tampa that may be restricting it
- Real estate experts and land owners receive frequent calls from Pinellas County regarding potential properties for development
- A Competitive Site Program similar to Hillsborough County may be helpful
- There does not seem to be marketing of the area
- The area does not have a sense of place or identity for what it is supposed/wants to be
- The limited northern roadway connection may be a deterrent
- There is a general lack of retail services in the general area to serve the employment base and to spur business growth

**Port Tenants & Port Staff**

The Port Commerce Center is currently at 100% occupancy. There is a potential need for more closed warehouse space and a mix of different sized warehouse spaces.

Air Products is currently expanding to accommodate a manufacturing plant they have closed in Pennsylvania and expect significant growth in the upcoming years. Current projects anticipating doubling or tripling the 120 existing employees. Air Products generally exports from the Port as importing is not economical. There is a concern about a unified vision for the Port and compatibility of surrounding areas.

Logistec believe their current activity and growth may add up to 400 trucks per day in and out of the Port in addition to the current 650 daily trucks.

Current challenges for transporting freight to and from the Port include the existing condition of roadways, security access in and out of the facility, no trucking rest stops within the area along I-75, no direct connect or interchange with better access to the Port area, and FP&L power outages that affect businesses.

The Port is financially healthy due to their diversified client base. They recognize the success the Port of Savannah, Georgia has had providing incentives to warehouse and distribution centers to locate many miles from the Port as an “inland port”. The Port is considering expanding their Foreign Trade Zone to the east side of US 41 however it is a lengthy process to accomplish that expansion.

Note: Port staff participated in multiple stakeholder sessions. Two session specific for Port staff, and for Port tenants were, in general, overlapping and have been combined in the above summary.

**Large Undeveloped Land Owners**

The existing large landowners, located north of Buckeye Road between US 41 and I-75, have been involved with this area for many years and support, in concept, the County’s pursuit for industrial development while also realizing other development pressures and opportunities. They recognize there may be higher profits from industrial development in the future yet are aware of the present residential market and must consider ultimately what will provide them the greatest financial benefit.

Challenges as they consider future transition of their properties to industrial as they see, or have been told, include the current level of infrastructure including water, sewer and overall roadway conditions, including Buckeye Road.

They generally feel discussions on the Study Area have been ongoing for a lengthy time and are frustrated with not seeing progressive change or public investment in the area. There is also a concern that if residential growth begins being developed beyond what has already occurred that it will deter industrial.

The owners feel the Port may not want a connector road as it could take away from potential development at the Port proper.

Expansion of uses allowed under the light industrial
designation may be needed within the area, perhaps something between the current allowable uses and heavy industrial uses. It was made abundantly clear that they covet and would not want to see any change made to their existing status of dual entitlements which allows flexibility between residential and industrial uses, unless it enhances flexibility.

**County Staff (Transportation, Utilities)**

There are utility constraints within the area including reserved sewer capacity and lines in Tiers 2 and 3, and north of Piney Point Road in Tier 1. Future businesses that opt to develop in the area would bear the cost of designing, extending, expanding, or establishing services.

There are no plans for roadways or utilities within the Study Area in the current 5-year CIP. They would need to be designed in conjunction with development coming on-line.

The CIP includes several improvements for various projects along Moccasin Wallow Road which will provide long term benefit and use to the Study Area.
1.5.0 INFRASTRUCTURE

Largely undeveloped, the Northwest County study area has not required an equivalent level of infrastructure investment as other portions of the County. Essential from an economic development perspective, the following have been evaluated:

- Transportation & Transit
- Water
- Wastewater
- Stormwater
- Energy & Power

This infrastructure included within this chapter focuses on the primary study area in addition to information regarding facilities located in the overall study area, or secondary study area. The purpose is to consider existing infrastructure and the future needs of the primary study area if the area were developed to its full industrial potential. It is important to note that the study area’s full potential was estimated based on available properties being developed at a Floor Area Ration (FAR) of 0.5. This FAR is somewhat high for typical industrial facilities, but assumes reasonable growth for the area and that square footage projections will average out across the overall study area.

The following table indicates the projected build-out of each tier assuming the nominal amount of existing residential development, currently approved development projects, and estimation of projected development on existing vacant parcels. This assumed most of the future development, including all of Tier 3 would be industrial.

<table>
<thead>
<tr>
<th>Tier</th>
<th>Industrial Sq. Ft.</th>
<th>Dwelling Unit</th>
<th>Concurrency Approved</th>
<th>Industrial Sq. Ft.</th>
<th>Dwelling Unit</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tier 1</td>
<td>1,561,578</td>
<td>16</td>
<td>3,562,625</td>
<td>10,269,601</td>
<td>82</td>
<td></td>
</tr>
<tr>
<td>Tier 2</td>
<td>49,040</td>
<td>1</td>
<td>7,150,000</td>
<td>8,781,897</td>
<td>207</td>
<td></td>
</tr>
<tr>
<td>Tier 3</td>
<td>-</td>
<td>14</td>
<td>14,000,000</td>
<td>1,508,397</td>
<td>14</td>
<td></td>
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<tr>
<td>Total</td>
<td>1,610,617</td>
<td>31</td>
<td>24,712,625</td>
<td>20,559,895</td>
<td>303</td>
<td></td>
</tr>
</tbody>
</table>
Current Transportation Network

The Northwest County study area is currently served by a limited network of east-west and north-south roads:

- US 41 is a 4-lane divided roadway which directly serves the port and provides north-south connectivity on the west side of the study area.
- I-75 is a 6-lane freeway which provides limited-access connectivity north-south on the east side of the study area. The single access point to I-75 in the vicinity of the study areas is the interchange at Moccasin Wallow Road.
- Buckeye Road is a 2-lane undivided roadway that extends east to west from US 41 to US 301. It does not provide access to I-75.
- Moccasin Wallow Road is a primarily 2-lane undivided roadway that extends from US 41 to US 301, with an interchange at I-75.
- Bud Rhoden Road is the sole existing north-south connection between US 41 and I-75, and extends from Buckeye Road to Moccasin Wallow Road. It continues south of Moccasin Wallow Road as Ellenton-Gillette Road.
- Artisan Lakes Parkway will eventually extend from north of Buckeye Road to Moccasin Wallow Road, but at this time is only partially completed. It will be a 4-lane divided roadway located between Bud Rhoden Road and I-75.

Level of Service

Table 6 provides the existing and estimated five (5) year roadway level of service conditions and work effort among all freight facilities including highways, railroads, airports, and seaports.

All roadways are currently operating within the adopted level of service standard except for I-75. It should be noted that I-75 has a higher level of service standard ("C") by virtue of its location outside the urban area boundary. Should the boundary be extended northward as a result of the 2020 census, the level of service standard will change to "D", and I-75 will operate within that level of service standard.

The “Reserved Trips” column reports trips from development approvals which have active Certificates of Level of Service (CLOS). These trips include those both from projects within the primary study area and those outside the primary study area traveling within the overall study area. While some of the CLOS’s extend beyond five (5) years, the reserved trips are tracked only out to a 5% impact area. Therefore, it can be expected that trips from other developments whose trips are not included in reserved trips will in fact impact the study area roadway network within a five (5) year period. In addition, it can be expected that a certain level of general background growth (especially long-haul cut-through traffic on US 41 and I-75) will also impact these roadways.

Many of the reserved trips are from residential developments which will generate passenger vehicle traffic as opposed to truck traffic. This is particularly true for Moccasin Wallow Road and the eventual Artisan Lakes Parkway. Both of these roadways directly serve approved residential development. For this reason, Artisan Lakes Parkway and Moccasin Wallow Road may not provide the most efficient or desirable freight corridors. Buckeye Road has fewer reserved trips, but again many of these are associated with residential developments. In addition, Buckeye Road does not connect to I-75, and has physical constraints which may limit the ability to improve capacity on that roadway, particularly at the west end.

Freight Corridor - Buckeye Road Improvement

Of the two existing east-west corridors, Buckeye Road is perhaps the best possible option for future use as a freight corridor. As outlined above, Buckeye Road is a 2-lane undivided roadway that extends east to west from US 41 to US 301 crossing over I-75 via an interstate overpass. The County’s Major Thoroughfare Plan lists this facility as an Urban Collector. Under the 2035 Future Traffic Circulation Plan Buckeye Road is slated to be 4-lane road with 150 foot of right of way between US 41 and I-75.

As noted above, Buckeye Road has several physical constraints which may limit the ability to increase the facility to a 4-lane roadway, particularly at the west end. Most notably, there is an existing “pinch point” for 1.25+ miles starting at US 41 moving east. The constraints include the existing Piney Point site and two
<table>
<thead>
<tr>
<th>Roadway Name and Segment</th>
<th>Lanes / Median</th>
<th>LOS Standards</th>
<th>Existing Two-Way Volumes</th>
<th>Existing Level of Service</th>
<th>Reserved Trips</th>
<th>Base 5 - Year Volumes</th>
<th>5 - Year Two-Way Service Volume (1,2)</th>
<th>5 - Year Level of Service (2)</th>
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</thead>
<tbody>
<tr>
<td>Hillsborough County Line to Buckeye Road</td>
<td>4D</td>
<td>D</td>
<td>5,900</td>
<td>882</td>
<td>B</td>
<td>923</td>
<td>1,805</td>
<td>5,900</td>
</tr>
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<td>Buckeye Road to Moccasin Wallow Road</td>
<td>4D</td>
<td>D</td>
<td>5,900</td>
<td>1,107</td>
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<td>470</td>
<td>1,577</td>
<td>5,900</td>
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<td><strong>Buckeye Road</strong></td>
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</tr>
<tr>
<td>US 41 to Bud Rhoden Road</td>
<td>2U</td>
<td>D</td>
<td>2,190</td>
<td>115</td>
<td>B</td>
<td>112</td>
<td>227</td>
<td>2,190</td>
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<td>Bud Rhoden Road to Carter Road</td>
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<td>D</td>
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<td>60</td>
<td>B</td>
<td>575</td>
<td>635</td>
<td>2,190</td>
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<tr>
<td><strong>Bud Rhoden Road</strong></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Buckeye Road to Moccasin Wallow Road</td>
<td>4D</td>
<td>D</td>
<td>1,510</td>
<td>82</td>
<td>C</td>
<td>285</td>
<td>367</td>
<td>1,510</td>
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<tr>
<td><strong>I-75</strong></td>
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<td></td>
<td></td>
</tr>
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<td>Hillsborough County Line to Moccasin Wallow Road</td>
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<td>C</td>
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<td>D</td>
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<td>6,720</td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>US 41 to Ellenton-Gillette Road</td>
<td>2U</td>
<td>D</td>
<td>1,580</td>
<td>564</td>
<td>C</td>
<td>1,283</td>
<td>1,847</td>
<td>3,380</td>
</tr>
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<td>Ellenton-Gillette Road to Gateway / 49th Ave E</td>
<td>2U</td>
<td>D</td>
<td>1,580</td>
<td>543</td>
<td>C</td>
<td>2,360</td>
<td>2,903</td>
<td>3,380</td>
</tr>
<tr>
<td>Gateway / 49th Ave E to I-75</td>
<td>4D</td>
<td>D</td>
<td>3,380</td>
<td>543</td>
<td>C</td>
<td>1,101</td>
<td>1,101</td>
<td>3,380</td>
</tr>
</tbody>
</table>

1. Service Volume for County Roads from Manatee County Link Sheets; Service Volume for State Roads from FDOT Level of Service Tables, 2012
2. Assumes CIP Improvements
major gas line easements adjacent to the existing right of way. There are also significant roadside ditches on both the north and south sides of the existing road.

In order to provide improved access that can facilitate industrial traffic for Tiers 2 & 3, Buckeye Road would need to be improved in its current location, or an alternative route would need to be identified. This may include the acquisition of right way in some locations, however, it is known that many of the development approvals that abut Buckeye Road were required to identify future right of way for dedication to the County.

Buckeye Road is approximately 3.75 miles from US 41 to the I-75 overpass ramp. If the assumption is that the facility can be expanded and enhanced to a 4-lane divided freight corridor (able to accommodate heavy truck traffic) for the entire length, the cost of engineering and construction would be estimated to be $36,562,500 or $9,750,000 per lane mile.

It could also be assumed that a traffic signal would be warranted at US 41 at a cost of $669,538. These costs are based the latest FDOT District 7 costs for a rural roadway section, and include construction, maintenance of traffic, mobilization, engineering, inspection and contingency. District 7 is the nearest FDOT District which provides these detailed costs. They do not include the cost of any additional right-of-way which may need to be acquired. In addition, these are generalized costs based on several, diverse projects.

Actual costs could be higher or lower depending on actual topography, drainage requirements, utility conflicts, and other factors. In addition, it does not include the cost of an interchange at I-75, originally identified in the 1968 Manatee County Concept Development Plan. The FDOT District 7 cost estimate for a new single-point urban interchange is approximately $45,000,000. While an interchange at Buckeye Road would likely be a two-point interchange, the FDOT estimate is informative of the likely cost of a rural interchange.

Therefore, in very rough terms, the improvement of Buckeye Road to a 4-lane freight corridor with a connection to I-75 could cost $80 to $90 million dollars in present day dollars.

1.5.2 TRANSIT

Manatee County Area Transit (MCAT) is the major public transportation provider in Manatee County, Florida serving the Bradenton, Ellenton, Palmetto, and Gulf Beach communities. MCAT offers 13 fixed bus routes across the County, including trolley connections to Anna Maria Island, Longboat Key, and Manatee Beach. MCAT operates Monday through Saturday, 5:30 am to 8 pm in the evening with limited service offered on Sundays and holidays.

Of the 13 fixed bus routes that MCAT operates, none operate within the Northwest County study area. Route 201, the North County ConneXion, is the closest in proximity to the Study Area, running just south of I-275, and looping at 73rd Street East near Rubonia.
In order for the Northwest County study area to successfully support a diversified mix of industrial and port related uses, adequate potable, non-potable and wastewater infrastructure will be required. In the day-to-day operations of industrial facilities, potable water will be essential in supporting employee restroom facilities and hygiene, non-potable water will be needed for the irrigation and maintenance of green open space, and wastewater will be necessary in maintaining the treatment and attenuation of rainfall and site run-off. For these reasons the following section explores general flow and demand calculations of each utility within each tier of the Northwest County study area in order to estimate the future demand for utilities within the study area.

**WATER DEMAND:**

Table 7 provides the average daily potable and non potable water demands for the build-out of each Tier. It is not anticipated that significant seasonal demands will occur on the potable water supply system. The non-potable water demands may vary seasonally although the actual variations will be related more to the weather and the supply of rainwater than to other factors.

### Table: 7 - Potable / Non-Potable Water Demand

<table>
<thead>
<tr>
<th>Phase / Land Use</th>
<th>Potable Water Demand (MGD)</th>
<th>Non-Potable Water Demand (MGD)</th>
<th>Total (MGD)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Irrigation</td>
<td>Other</td>
<td></td>
</tr>
<tr>
<td>Tier 1</td>
<td>4.7918</td>
<td>4.7995</td>
<td>9.5912</td>
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<tr>
<td>Tier 2</td>
<td>5.0038</td>
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<td>Tier 3</td>
<td>4.8110</td>
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<td><strong>Project Totals:</strong></td>
<td><strong>14.6065</strong></td>
<td><strong>9.1455</strong></td>
<td><strong>23.7520</strong></td>
</tr>
</tbody>
</table>

**Assumptions:**

1. Standard irrigation rate of 1" per week
2. Open Space (irrigation area) of 35%
3. Industrial use is 50% warehouse and 50% manufacturing.

Table 8 provides a summary of non-potable (irrigation) area calculated for the build-out of each tier.

### Table: 8 - Irrigated Acreage

<table>
<thead>
<tr>
<th>Phase / Land Use</th>
<th>Total Area (Acres)</th>
<th>% Irrigated</th>
<th>Irrigated Area (Acres)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tier 1</td>
<td>3.536</td>
<td>35%</td>
<td>1,237.3</td>
</tr>
<tr>
<td>Tier 2</td>
<td>1.465</td>
<td>35%</td>
<td>509.3</td>
</tr>
<tr>
<td>Tier 3</td>
<td>1.746</td>
<td>35%</td>
<td>611.1</td>
</tr>
<tr>
<td><strong>Project Totals:</strong></td>
<td><strong>6,737</strong></td>
<td><strong>35%</strong></td>
<td><strong>2,357.7</strong></td>
</tr>
</tbody>
</table>

**Assumptions:**

1. Standard irrigation rate of 1" per week
2. Open Space (irrigation area) of 35%.
Potable Water Demand

Potable water demand rates are based on the Manatee County 2017 Utility Flow Contribution Table which assumes an average daily flow rate of 80 gallons per day per person. An assumption of 3 persons per unit for single-family dwellings is made. Flow contribution for the industrial use is assumed to be an even split between warehouse/distribution and manufacturing uses. Per the Manatee County 2017 Flow Contribution Table the average daily flow rates are 0.12 and 0.50 gallons per day per square foot of floor area respectively. Potable water demand rates for this project are detailed by development type and tier in Table 8 as follows:

### Table: 9 - Potable Water Demand Calculations

<table>
<thead>
<tr>
<th>Phase / Land Use</th>
<th>Units</th>
<th>Square Footage</th>
<th>Potable Water Rate (GPD)</th>
<th>Total Demand (MGD)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tier 1</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Single Family:</td>
<td>82</td>
<td>0</td>
<td>240</td>
<td>0.0197</td>
</tr>
<tr>
<td>Industrial</td>
<td>0</td>
<td>15,393,804</td>
<td>0.31</td>
<td>4.7721</td>
</tr>
<tr>
<td>Tier 1 Totals</td>
<td>82</td>
<td>15,393,804</td>
<td></td>
<td>4.7918</td>
</tr>
<tr>
<td>Tier 2</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Single Family</td>
<td>207</td>
<td>0</td>
<td>240</td>
<td>0.0497</td>
</tr>
<tr>
<td>Industrial</td>
<td>0</td>
<td>15,980,937</td>
<td>0.31</td>
<td>4.9541</td>
</tr>
<tr>
<td>Tier 2 Totals</td>
<td>207</td>
<td>15,980,937</td>
<td></td>
<td>5.0038</td>
</tr>
<tr>
<td>Tier 3</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Single Family</td>
<td>14</td>
<td>0</td>
<td>240</td>
<td>0.0034</td>
</tr>
<tr>
<td>Industrial</td>
<td>0</td>
<td>15,508,397</td>
<td>0.31</td>
<td>4.8076</td>
</tr>
<tr>
<td>Tier 3 Totals</td>
<td>14</td>
<td>15,508,397</td>
<td></td>
<td>4.8110</td>
</tr>
<tr>
<td>Project Totals:</td>
<td>303</td>
<td>46,883,137</td>
<td></td>
<td>14.6065</td>
</tr>
</tbody>
</table>

Assumptions: 1. Industrial use is 50% warehouse/distribution and 50% manufacturing

Non-Potable Water Demand

Non-potable water demands were based upon the assumption of 1 inch per acre per week. This is equivalent to 3,879 gallons per day of water per irrigated acre. Manatee County does not currently have reference to specific, detailed non-potable water demand criteria; therefore, the industry standard of 1” per acre per week was assumed for the following demand calculations listed in Table 10:

### Table: 10 - Non-Potable Water Demand Calculations

<table>
<thead>
<tr>
<th>Phase / Land Use</th>
<th>Total Area (Acres)</th>
<th>Non-Potable Rate (GPD)</th>
<th>Non-Potable Water Demand (MGD)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tier 1</td>
<td>1,237.3</td>
<td>3879 GPD/AC</td>
<td>4.7995</td>
</tr>
<tr>
<td>Tier 2</td>
<td>509.3</td>
<td>3879 GPD/AC</td>
<td>1.9756</td>
</tr>
<tr>
<td>Tier 3</td>
<td>611.1</td>
<td>3879 GPD/AC</td>
<td>2.3705</td>
</tr>
<tr>
<td>Phase I Totals:</td>
<td>2,357.6</td>
<td></td>
<td>9.1455</td>
</tr>
</tbody>
</table>

Assumptions: 1. Standard irrigation rate assumed to be 1” per week 2. Open Space (irrigation area) on assumed to be 35%.
WATER SUPPLY

Potable Water Supply

The Manatee County Water Treatment Plant has a permitted capacity of approximately 84.0 MGD and a maximum daily flow based on monthly operating reports for the last 12 months of approximately 52.0 MGD. The Manatee County Water Treatment Plant appears to have the capacity to supply potable water to the study area.

Within Tier 1, potable water lines are available in the US 41 right-of-way, Bud Rhoden Road right-of-way, and the Buckeye Road right-of-way.

Within Tier 2, there is a potable water line available in the Buckeye Road right-of-way. In order to fully serve Tier 2, an extension of the existing potable water line in the Buckeye Road right-of-way will be necessary along with connection to the proposed potable water line within the future Artisan Lakes Parkway right-of-way.

There are no potable water lines available within the Tier 3 area. To serve Tier 3, the assumption was made that lines had been extended to serve Tier 2 and those lines can be extended further to serve Tier 3.

Non-potable Water Supply

There are no non-potable lines available within the 3 Tiers. The closest line available is in the Moccasin Wallow Road right-of-way east of I-75. In order to serve Tier 1 the existing non-potable line east of I-75 will need to be extended west under I-75 and along the Moccasin Road right-of-way and connect to the existing line in Artisan Lakes Parkway right-of-way. That line will then be extended north to Buckeye Road and east along the Buckeye Road right-of-way to US41. The line would then be extended north and south along the US41 right-of-way to serve the remainder of Tier 1.

Within Tiers 2 and 3 the assumption was made that the lines had been extended to serve Tier 1 and those lines can be extended further to serve Tiers 2 and 3.
WASTEWATER DEMAND

As identified in the previous section, in addition to potable and non-potable services, in order to support industrial and port related uses within the Northwest County study area, adequate wastewater infrastructure will be necessary. In the daily operations of industrial facilities wastewater infrastructure is essential in maintaining the treatment and attenuation of rainfall and site run-off. The following section estimates flow and generation calculations for wastewater within each tier of the Northwest County study area in order to estimate future demand for wastewater infrastructure within the study area.

Table: 11 - Wastewater Flow Projections

<table>
<thead>
<tr>
<th>Phase / Land Use</th>
<th>Wastewater Generation (MGD)</th>
<th>On-Site Wastewater Treatment (MGD)</th>
<th>Off-Site Wastewater Treatment (MGD)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tier 1</td>
<td>3.8681</td>
<td>0.000</td>
<td>3.8681</td>
</tr>
<tr>
<td>Tier 2</td>
<td>4.0449</td>
<td>0.000</td>
<td>4.0449</td>
</tr>
<tr>
<td>Tier 3</td>
<td>3.8805</td>
<td>0.000</td>
<td>3.8805</td>
</tr>
<tr>
<td><strong>Project Totals:</strong></td>
<td><strong>11.7935</strong></td>
<td><strong>0.000</strong></td>
<td><strong>11.37935</strong></td>
</tr>
</tbody>
</table>

Wastewater generation rates for this project are detailed by development type and phase in Table 12 as follows:

Table: 12 - Wastewater Generation

<table>
<thead>
<tr>
<th>Phase / Land Use</th>
<th>Units</th>
<th>Square Footage</th>
<th>Wastewater Rate (GDP)</th>
<th>Total Demand (MGD)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tier 1</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Single Family:</td>
<td>82</td>
<td>0</td>
<td>240</td>
<td>0.0197</td>
</tr>
<tr>
<td>Industrial</td>
<td>0</td>
<td>15,393,804</td>
<td>0.25</td>
<td>3.8486</td>
</tr>
<tr>
<td><strong>Tier 1 Totals</strong></td>
<td><strong>82</strong></td>
<td><strong>15,393,804</strong></td>
<td><strong>0.25</strong></td>
<td><strong>3.8681</strong></td>
</tr>
<tr>
<td>Tier 2</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Single Family</td>
<td>207</td>
<td>0</td>
<td>240</td>
<td>0.0497</td>
</tr>
<tr>
<td>Industrial</td>
<td>0</td>
<td>15,980,937</td>
<td>0.25</td>
<td>3.9952</td>
</tr>
<tr>
<td><strong>Tier 2 Totals</strong></td>
<td><strong>207</strong></td>
<td><strong>15,980,937</strong></td>
<td><strong>0.25</strong></td>
<td><strong>4.0449</strong></td>
</tr>
<tr>
<td>Tier 3</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Single Family</td>
<td>14</td>
<td>0</td>
<td>240</td>
<td>0.0034</td>
</tr>
<tr>
<td>Industrial</td>
<td>0</td>
<td>15,508,397</td>
<td>0.25</td>
<td>3.8771</td>
</tr>
<tr>
<td><strong>Tier 3 Totals</strong></td>
<td><strong>14</strong></td>
<td><strong>15,508,397</strong></td>
<td><strong>0.25</strong></td>
<td><strong>3.8805</strong></td>
</tr>
<tr>
<td><strong>Project Totals:</strong></td>
<td><strong>303</strong></td>
<td><strong>46,883,137</strong></td>
<td></td>
<td><strong>11.7935</strong></td>
</tr>
</tbody>
</table>
WASTEWATER COLLECTION

The Manatee County North Regional Wastewater Treatment Facility has a permitted capacity of approximately 7.5 MGD and a maximum monthly average daily flow based on monthly operating reports for the last 12 months of approximately 4.3 MGD. There are approximately 2.2 MGD of existing flow commitments for the facility. The Facility does not appear to have capacity to serve the build-out of the study area.

Within Tier 1, force mains are available in the US 41 right-of-way and the Buckeye Road right-of-way.

Within Tier 2, there are no available force mains to serve the study area. In order to fully serve Tier 2, an extension of the existing force main in the Buckeye Road right-of-way will be necessary along with connection to the proposed force main within the future Artisan Lakes Parkway right-of-way.

There are no non-potable water lines available within the Tier 3 area. To serve Tier 3, the assumption was made that lines had been extended to serve Tier 2 and those lines can be extended further to serve Tier 3.
ESTIMATED NEED

Based on preliminary projections for build-out of the study area, identified need based on data available and reviewed, and estimated current construction costs, the following estimates have been developed for the installation of water and sewer lines to facilitate development of the Study Area. At this time, improvements have not been included for water, sewer, or reclaim water north of Piney Point Road. Additionally, as reclaim water is not essential, it is not included as a short term priority. Currently there is sufficient capacity within Tier 1 therefore, estimated need identified below pertains to Tiers 2 and 3.

Potable Water, Tiers 2 & 3

- Install approximately 12,500 LF of 12” water main on Buckeye Road from approximately 3,500 LF east of Bud Rhoden Road east to I-75. Cost: approximately $1,125,000

Sanitary Sewer, Tiers 2 & 3

- Install approximately 7,200 LF of 10” force main on Buckeye Road from Artisan Lakes Parkway east to I-75. Cost: approximately $540,000

Assumptions:

- Each bullet point would be a stand-alone project.
- Installation of a 10” sanitary force main estimated at $75/LF
- Installation of 12” potable water main estimated at $90/LF
- Costs per LF include design and permitting
FUTURE CONSIDERATION

Reclaim water may be critical to certain manufacturing users for cooling and washing systems. It provides a significant cost savings over potable water by using the lowest grade water source. As manufacturing and industrial development occurs, it may be advantageous to consider a future reclaim system. Based on preliminary projections for build-out of the Study Area, potential need, and estimated current construction costs, the following estimates have been developed for the installation of reclaim water in the Study Area.

Non-Potable Water (reclaim)

- Install approximately 13,500 LF of 20" reclaimed water main on Moccasin Wallow Road from east of I-75 west to US 41. Cost: approximately $2,565,000
- Install approximately 18,000 LF of 16" reclaimed water main on US 41 from Moccasin Wallow Road north to the County Line. Cost: approximately $2,880,000
- Install approximately 20,000 LF of 16" reclaimed water main on Buckeye Road from US 41 east to I-75. Cost: approximately $3,200,000

Assumptions:

- Each bullet point would be a stand-alone project.
- Installation of 16" non-potable water main estimated at $160/LF
- Installation of 20" non-potable water main estimated at $190/LF
- Costs per LF include design and permitting
1.5.4 STORMWATER

The Northwest County study area falls within four major drainage basins as determined by the Southwest Florida Water Management District. There are systems of wetland and agricultural ditches within both basins. The subject property is mostly undeveloped agricultural land with delineated flood zones as indicated on Primary Study Area Flood Zone Map.

The four drainage basins are described in detail as follows:

Curiosity Creek

The portion of the study area located within the Curiosity Creek Drainage Basin sheet flows through wetlands and agricultural ditches to reach Curiosity Creek. The headwaters of Curiosity Creek start just south of the study area’s southern boundary, flowing north. The creek then continues to flow north beneath Buckeye Road before turning east/northeast to flow beneath I-75 and finally discharging into the Little Manatee River.

This portion of the Curiosity Creek Basin is included in FDEP’s verified list of impaired waterbodies as WBID 1792. WBID 1792 is impaired for Fecal Coliform and Nutrients (phosphorus and nitrogen). Net improvement calculations will be required for stormwater management areas within this basin. There are no additional restrictions regarding treatment and discharge rates enforced by Manatee County for this portion of the Little Manatee River basin.

Piney Point Creek

The portion of the study area located within the Piney Point Creek Drainage Basin sheet flows through wetlands and agricultural ditches to reach Piney Point Creek which discharges directly into Tampa Bay.

This portion of the Piney Point Creek Drainage Basin is included in FDEP’s verified list of impaired waterbodies...
as WBID 1789. WBID 1789 is impaired for Fecal Coliform and does not require net improvement calculations. There are no additional restrictions regarding treatment and discharge rates enforced by Manatee County for this portion of the Little Manatee River basin.

**Tampa Bay**

The portion of the study area located within the Tampa Bay drainage is minimal and located along the shoreline of the study area and discharges directly to the bay.

This portion of the Tampa Bay Drainage Basin is included in FDEP’s verified list of impaired waterbodies as WBID 1558BZ which is impaired for Fecal Coliform and does not require net improvement calculations. There are no additional restrictions regarding treatment and discharge rates enforced by Manatee County for this portion of the Tampa Bay.

**Terra Ceia Bay (Bishops Harbor)**

The remainder of the site is located within the Terra Ceia (Bishops Harbor) drainage basin. This basin sheet flows through wetlands and Tampa Bay tributary systems in a westerly direction before discharging directly to Lower Tampa Bay.

The study area’s portion of the Terra Ceia Bay resides in the impaired waterbody identified as WBID 1797B (Bishops Harbor) on the FDEP verified list of impaired waterbodies. WBID 1797B is impaired for fecal coliform which does not require net improvement calculations. There are no restrictions currently in place regarding discharge rates and treatment of stormwater run-off by Manatee County.

The stormwater management system proposed for the Northwest Manatee Study Area shall be designed in accordance with the Manatee County Land Development Code and the Southwest Florida Water Management District requirements and incorporate a system of wet detention ponds, open channels, stormwater collection piping, floodplain mitigation areas if needed, potential off-site storage areas and existing isolated wetlands, as determined by the appropriate agencies.

The applicable Stormwater Management Design Criteria are outlined in Table 13 as follows:

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Design Storm</th>
</tr>
</thead>
<tbody>
<tr>
<td>Finished floor elevation of habitable structures</td>
<td>100-Year</td>
</tr>
<tr>
<td>Water quality volume</td>
<td>1” over site - wet detention</td>
</tr>
<tr>
<td></td>
<td>1/2” over site - dry retention</td>
</tr>
<tr>
<td>Post-development discharge rate</td>
<td>25 year 24 hour pre-developed rate</td>
</tr>
</tbody>
</table>

Source: Southwest Florida Water Management District and Manatee County
The pre-developed and post-developed sites storm water discharge rate will be analyzed based on the SCS Type II Florida Modified 25-year 24-hour storm event. Post-developed discharge rates will be limited to pre-developed maximum rates in accordance with State and County regulations.

Pre-developed discharge water quality is typical of that associated with row crops, pasture and groves. The Post Developed storm water management system will be designed utilizing wet detention as a means of achieving state water quality standards. Some limited parts of the system may utilize other methods as needed, which are commonly accepted by the state and county, to achieve state water quality standards such as dry detention or wetland treatment. Please refer to Table 13 for design criteria.

The post-development storm water management system will be designed to avoid adverse impacts to property and environmentally sensitive areas, upstream and downstream of the site, as well as maintain the pre-development hydrology as much as is practically possible. If a regional storm water management system is developed for the study area, each tier would require the approximate acres of lake indicated by Table 14. Water Quality and Quantity standards will be achieved through the storm water management system which will be designed in accordance with state and local criteria and will utilize ponds, lakes, wetlands and control structures with skimmers to achieve the following:

- No de-hydration or adverse flooding of existing wetland systems
- Post-developed flows will be attenuated so that no upstream or downstream adverse impacts are created.
- Stormwater treatment to ensure water quality criteria is met in accordance with State and Manatee County standards.
- Floodplain management so that no upstream and downstream adverse impacts are created.

A regular maintenance program will be developed for all developments within the study area in accordance with SWFWMD and Manatee County.

**Table: 14 - Regional Stormwater Management System**

<table>
<thead>
<tr>
<th>Tier</th>
<th>Approximate Stormwater Lake Area Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tier 1</td>
<td>530 acres</td>
</tr>
<tr>
<td>Tier 2</td>
<td>218 acres</td>
</tr>
<tr>
<td>Tier 3</td>
<td>262 acres</td>
</tr>
</tbody>
</table>
1.5.5 ENERGY & POWER

Florida Power & Light (FP&L) is the service provider for electrical power and it is understood that FP&L can serve any level of future development to Study Area. Service is currently provided through a substation located at Buckeye Road and US 41. Currently there is no secondary substation available to serve the Study Area however options are available to enhance the electrical power for additional service capacity. The enhanced service would come via the expansion of a second substation in Rubonia. FP&L indicates service can and will be provided if future development warrants. This would be available at the cost of the developer with the understanding that there may be some economic development incentives to assist in covering the costs.

Longer term as clean power throughout the state is increasing, Manatee County is well situated with FP&L and its continued reinvestment and conversion from older fossil-fuel generation plants to new clean sources. Currently, FP&L operates a solar plant in Parrish, just southeast of the study area and within Manatee County. FP&L has also recently announced plans to construct the world’s largest solar battery system in Manatee County, and adjacent to the Parrish facility.

In addition to other clean sources and efforts, FP&L also offers EarthEra, a clean biodiesel alternative fuel source. According to FP&L, this provides a reliable, cost-competitive clean biodiesel blend solution for businesses requiring diesel fuel.

FP&L’s continued investment in clean power, and particularly in Manatee County will be an advantage in attracting certain future uses conscience of power costs and sustainability.
1.6.0 OPPORTUNITIES AND CONSTRAINTS INTRODUCTION

Based on its location and proximity to a major roadway network and Port Manatee, the amount of undeveloped land, and the substantial development in surrounding areas, the limited development that has occurred within the Northwest County area is surprising.

After detailed study and preparation of the first phase of this study, there are several opportunities and challenges identified that have impacted the study area's lack of development.

The following pages provide a summary of findings at this time. The next phase of this study will include the economic assessment which, once evaluated, and in conjunction with the information that has been gathered through the process to date, will result in more specific recommendation to complete the Northwest County plan.
<table>
<thead>
<tr>
<th><strong>OPPORTUNITIES</strong></th>
<th><strong>CONSTRAINTS</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Roads</strong></td>
<td><strong>Roads</strong></td>
</tr>
<tr>
<td>• Proximity to US 41, I-75, and I-275</td>
<td>• Lack of proposed roadway network improvements</td>
</tr>
<tr>
<td>• Impending improvements to Moccasin Wallow Road</td>
<td>• Deep roadside ditches, gas line, and FP&amp;L easements adjacent to Buckeye Road</td>
</tr>
<tr>
<td>• Recent interchange improvements at Moccasin Wallow Road and I-75</td>
<td>• Physical constraints for the first 1.25 miles of Buckeye Road relative to utility easements and Piney Point limiting roadway widening</td>
</tr>
<tr>
<td>• Public-private partnership for improvements to Buckeye Road or other access to serve Tiers 2 &amp; 3</td>
<td>• Minimal short-term access to an I-75 interchange</td>
</tr>
<tr>
<td><strong>Utilities</strong></td>
<td><strong>Utilities</strong></td>
</tr>
<tr>
<td>• Public-private partnership for expansion of service to Tiers 2 &amp; 3</td>
<td>• Current capacity &amp; reservations</td>
</tr>
<tr>
<td>• Adjacency to Port Manatee</td>
<td>• Need to expand water, wastewater &amp; reclaim water to serve the study area</td>
</tr>
<tr>
<td>• County commitment to guide development for economic opportunity</td>
<td>• “First in pays” for utility and infrastructure improvements</td>
</tr>
<tr>
<td>• Numerous local incentive programs in place</td>
<td>• Lack of County planning and design for the expansion of water, wastewater &amp; reclaim to serve the study area</td>
</tr>
<tr>
<td>• Masterplans to serve certain areas</td>
<td>• Financing limitations for utility improvements</td>
</tr>
<tr>
<td><strong>Identification &amp; Marketing</strong></td>
<td><strong>Identification &amp; Marketing</strong></td>
</tr>
<tr>
<td>• Adjacency to Port Manatee</td>
<td>• Lack of branding and marketing of the development opportunity, or sense of arrival within the study area</td>
</tr>
<tr>
<td>• County commitment to guide development for economic opportunity</td>
<td>• Perception that undeveloped tracts are priced above market rate for similar sites in the region</td>
</tr>
<tr>
<td>• Numerous local incentive programs in place</td>
<td>• Economic viability of Port Manatee for import of goods</td>
</tr>
<tr>
<td><strong>Ownerships</strong></td>
<td><strong>Ownerships</strong></td>
</tr>
<tr>
<td>• Substantial undeveloped land, many with industrial entitlements approved</td>
<td>• Continued industrial development in other areas of Manatee County and Southwest Florida</td>
</tr>
<tr>
<td>• Flexible zoning in place for key parcels</td>
<td>• Continued growth and recognition of Port Tampa</td>
</tr>
<tr>
<td>• Limited ownership of largest parcels within Tiers 2 &amp; 3</td>
<td><strong>General</strong></td>
</tr>
<tr>
<td><strong>General</strong></td>
<td><strong>General</strong></td>
</tr>
<tr>
<td>• Opportunity to seek grants or other government funding to enhance the area</td>
<td>• Limited ownership of largest parcels within study area</td>
</tr>
<tr>
<td>• Continued population growth in Manatee and adjacent Hillsborough Counties</td>
<td>• Residential development pressures</td>
</tr>
<tr>
<td>• Hillsborough County Urban Service Boundary limitations that may push non-residential development south</td>
<td><strong>General</strong></td>
</tr>
<tr>
<td>• Potential remediation plans for Piney Point</td>
<td>• Hillsborough County urban Service Boundary limitations pushing residential development south</td>
</tr>
<tr>
<td>• Expansion of fuel transmission through the Port</td>
<td>• Piney Point’s location in the industrial activity</td>
</tr>
<tr>
<td>• Expansion capacity of existing industrial</td>
<td><strong>General</strong></td>
</tr>
<tr>
<td>• Flexible land uses</td>
<td>• Hillsborough County urban Service Boundary limitations pushing residential development south</td>
</tr>
<tr>
<td></td>
<td>• Piney Point’s location in the industrial activity</td>
</tr>
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</table>
1.6.0 OPPORTUNITIES & CONSTRAINTS

The NW Manatee study area is unique in the Southwest Florida region due to its large amount of undeveloped lands west of I-75 and its location near significant development.

Proximity to both I-75 and US 41 to the east and west, I-275 to South, and Port Manatee to the west provides many options for access, shipping, and the transportation of goods.

Recent years have seen some industrial development and expansion closer to US 41 and a few landowners which have significant acreage holdings east of US 41. This can be viewed as both an asset and a liability for future development of the study area.

Also in recent years, Manatee County has implemented multiple planning overlays and development incentives to further encourage development within the study area. Additionally, there have been multiple studies conducted of the general area and Port Manatee over the last several years that seek to establish a roadmap for the future.

However, the greatest challenge remains that while industrial development has occurred throughout the region, the study area continues to remain largely undeveloped.

In the process of evaluating the study area, a review and examination of previous plans, existing regulations, and environmental and infrastructure conditions was conducted. In-person stakeholder interviews, as well as telephone and in person discussions with various property owners, officials, staff and others involved within the area were held in order to establish a broad understanding of the study area.

While there are many opportunities related to the study area, there are some key constraints that may have limited its past success and may threaten its future opportunities for industrial development. Based on a thorough review, excluding market analysis, key challenges within the study area as it relates to future industrial development can be considered in four categories; roadways, utilities, identity & marketing, and ownership.

Roadways

The study area’s proximity to major roadways is an asset, however, roadway infrastructure within the general area is limited and does not support significant light or heavy industrial development. Moreover, the limited design and planning for future roadway improvements within the study area would extend any potential improvements out a minimum of one to two years. Lastly, access to I-75 requires use of Mocassin Wallow Road south of the study area, which is developing as a spine road for large new residential development.

Utilities

In general any future industrial development will require installation of significant utilities including water, wastewater, and electric if the prospective business requires a second electrical feed. Florida Power and Light does have an economic development program which reduces costs for prospective businesses. However, utilities provided through Manatee County are based on a “first in pays” methodology, which could be a significant upfront cost to a prospective business.

Identity & Marketing

Manatee County, staff, and officials should be commended on their creativity and initiative in establishing the various overlays and incentives that exist within the study area. All of these provide some level of benefit in the development process. The stakeholders who have located their businesses in the area felt the County’s expedited review process and guidance provided by the Redevelopment and Economic Opportunity Department was critical to their success.

Unfortunately, the branding and promotion of the area as a site for future industrial development seems to be lacking. Port Manatee provides a benefit to the area due to its unique purpose to Manatee County. However its relatively small size does not create the level of activity needed to define the area. Additionally, while Manatee County’s Redevelopment and Economic
Opportunity Department promotes the area, it is not clearly apparent that Port Manatee nor the Bradenton Area Economic Development Corporation promotes available lands located in the primary study area.

**Ownerships**

There are many smaller parcels located along US 41 and in the Tier 1 portion of the study area which based on location, size, and proximity to utilities, will have the greatest opportunity for short-term industrial development.

The larger study area, primarily Tiers 2 and 3 are predominantly very large tracts with limited ownership. As Manatee County continues to experience upward trends in residential growth and development, the pressure on these land owners to sell for residential use will likely continue to increase. Should that occur, roadways as they are will only expand to satisfy greater residential demand, which will subsequently hinder industrial traffic.

Conversely, any development requires a willing buyer and seller. Property owners that are considering or actively marketing their land for industrial development within this area will need to market competitively taking into consideration the infrastructure needs of the area.

**Summary**

Overall, the Northwest County study area has numerous opportunities to develop into an industrial hub for Manatee County and the greater Tampa Bay region. However, it first must overcome constraints which affect the area’s ability to be developed as such.

Both the opportunities and constraints appearing to face the area are related to the area’s transportation facilities, utility infrastructure and capacity, ownership, and marketing, as well as external contributors such as neighboring counties. Addressing these constraints will allow the study area to leverage opportunities related to future development of the area as an industrial anchor.
1.7.0 PLAN RECOMMENDATIONS

The following recommendations have been developed following analysis of the Northwest Manatee Area to guide future efforts to encourage further industrial and manufacturing investment within the Area. The recommendations are categorized by tiers and as short-term, mid-term and long-term for future planning, funding, and implementation. They have been further categorized into one of seven classifications: Land Use, Transportation, Potable Water & Sewer, Reclaim Water, Energy & Technology, Branding, and Policy & Funding.

A summary matrix of recommendations is included at the end of this section.

<table>
<thead>
<tr>
<th>SHORT-TERM RECOMMENDATIONS - TIER 1</th>
<th>Land Use</th>
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<tbody>
<tr>
<td><strong>Consider proactive expansion of the existing IH (Industrial Heavy) Comprehensive Plan Future Land Use designation:</strong></td>
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<tr>
<td>• Currently Tier 1 has 2,182 acres of IH designation mainly consisting of Port Manatee and HRK Holdings owned lands</td>
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<tr>
<td>• Focus on lands directly adjacent to US 41 to allow for expanded opportunities for heavy industrial and manufacturing uses</td>
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<tr>
<td>• Follow any Comprehensive Plan map amendments with the rezoning of properties and/or updates to the land use allowed on existing PDEZ parcels</td>
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<tr>
<td><strong>Consider amendments to existing IL (Industrial Light) Comprehensive Plan Future Land Use designation to allow more intense land uses:</strong></td>
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<tr>
<td>• Currently Tier 1 has approximately 1,235 acres of IL designation</td>
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<tr>
<td>• Create performance standards to limit adverse impacts such as locational criteria, increased setbacks/perimeter landscape buffering, building heights, etc. to ensure compatibility with surrounding uses</td>
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</tr>
<tr>
<td>• Understand these performance standards may be utilized in the Florida International Gateway Overlay</td>
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<tr>
<td>• Implement performance standards through the Land Development Code</td>
<td></td>
</tr>
<tr>
<td>• Make these code amendments specific to Port Manatee / NW Manatee Study Area</td>
<td></td>
</tr>
</tbody>
</table>
SHORT-TERM RECOMMENDATIONS - TIER 1 (continued)

Transportation

• Continue working with the MPO/FDOT on a new I-75 interchange to better serve the area.

Energy & Technology

• Create a competitive advantage with enhanced non-public infrastructure improvements.
  • Wi-Fi (5G) - Investigate incentive options for proactive installation of improved service by local providers
  • Electrical Service - Encourage Florida Power & Light (FPL) to install a new substation to allow for redundant service that will help avoid interruptions to electrical services critical to industrial uses

Branding

• Create an identity / brand and marketing plan for the NW Area with a focus on e-commerce, distribution and warehousing, and manufacturing.

  • Enhanced identification area-wide
    • Develop a name, a logo, signage and collateral materials (print & digital - web, social, tv) for the area
    • Consider wayfinding signage and gateway features along "entranceway" locations to the NW Manatee Area as opposed to solely Port Manatee
    • Consider including Port Manatee signage along I-75 near the Moccasin Wallow Rd Interchange
  • Focused Approach
    • Consider developing an area-wide master plan, including more detail of a unified vision
    • Develop a database of competitive properties outside of the study area including location, asking and sales prices, existing infrastructure, planned improvements, and area features
    • Establish a working partnership with the Bradenton Area Economic Development Corporation and real estate entities for enhanced industrial recruitment to this specific area
    • Focus on target industries in the 10-year build-out scenario as identified in the HR&A Market Study
    • Tie target industries to analysis and relate to parcel sizes

• Create an identity / brand and marketing plan for the NW Area with a focus on e-commerce, distribution and warehousing, and manufacturing.
### MID-TERM RECOMMENDATIONS - TIER 1

#### Transportation

- Continue working with the MPO / FDOT on a new I-75 interchange to better serve the area.

#### Reclaim Water

- Consider master planning a reclaim water system to support future growth and reuse of effluent water generated by the wastewater treatment plant.
  
  - Reclaim water is often considered critical to manufacturing users and is used for cooling and washing systems (there is a cost saving for using lowest grade water source)
  
  - Not critical to Warehouse/Distribution users

### LONG-TERM RECOMMENDATIONS - TIER 1

#### Transportation

- Continue working with the MPO / FDOT on a new I-75 interchange to better serve the area.

#### Reclaim Water

- Consider master planning a Reclaim water system for future growth and reuse of effluent water generated by the wastewater treatment plant.

  - Reclaim water is often considered critical to manufacturing users and is used for cooling and washing systems (there is a cost saving for using lowest grade water source)

  - Not critical to Warehouse/Distribution users
### SHORT-TERM RECOMMENDATIONS - TIER 2

#### Land Use

- Consider amendments to existing IL (Industrial Light) Comprehensive Plan Future Land Use designation to allow more intense land uses.
  - Currently Tier 2 has 253 acres of IL designation
  - Create performance standards to limit adverse impacts such as locational criteria, increased setbacks/perimeter landscape buffering, building heights, etc. to ensure compatibility with surrounding uses
  - Understand these Performance Standards may be utilized in the Florida International Gateway Overlay
  - Implement Performance Standards through the Land Development Code
  - Make these amendments specific to Port Manatee / NW Manatee Study Area

#### Transportation

- Develop cost estimates for three alternative alignments of Buckeye Road to determine the feasibility of proactive construction to serve Tiers 2 & 3 development.
  - Magnitude of Tier 2 & 3 development could attract large scale users.
  - Current alignment
    - Constrained right-of-way with environmental concerns, power line and gas line easements
    - Expected to carry a large volume of domestic vehicles - conflicting with truck movements
  - Buckeye Road is critical to full build-out of Tier 2 & 3
  - Include intersection improvements and signalization at US 41 to serve truck turning movements
  - Update existing County cost estimates for alignment alternatives
  - Alternate alignment could be a dedicated industrial corridor
    - Potential heavy truck volume
    - Easy access and lack of traffic conflicts are attractive to end users
    - Alternative alignments north of the current Buckeye Road alignment provide a direct feeder to large parcels serving over 3,00 acres
    - Connection to US 41 could serve as the first leg of the Piney Point Road extension
  - Retain the future Piney Point Road extension on the County’s Major Thoroughfare Plan for additional access to Tiers 2 & 3 and as a potential I-75 interchange location
  - Continue working with the MPO/FDOT on a new I-75 interchange to better serve the area
Energy & Technology

- Create a competitive advantage with enhanced non-pubic infrastructure improvements
  - Wi-Fi (5G) - Investigate incentive options for proactive installation of improved service by local providers
  - Electrical Service - Encourage Florida Power & Light (FPL) to install a new substation to allow for redundant service that will help avoid interruptions to electrical services critical to industrial uses

Branding

- Create an identity / brand and marketing plan for the NW Area.
  - Enhanced identification area-wide
    - Develop a name, a logo, signage and collateral materials (print & digital - web, social, tv) for the area
    - Consider wayfinding signage and gateway features along “entranceway” locations to the NW Manatee Area as opposed to solely Port Manatee
    - Consider including Port Manatee signage along I-75 near the Moccasin Wallow Rd Interchange
  - Focused Approach
    - Consider developing an area-wide master plan, including more detail of a unified vision
    - Identify Tier 2 & 3 as an Inland Port
    - Develop a database of competitive properties outside of the study area including location, asking and sales prices, existing infrastructure, planned improvements, and area features.
    - Establish a working partnership with the Bradenton Area Economic Development Corporation and real estate entities for enhanced industrial recruitment to this specific area
    - Focus on target industries and the 10-year build-out scenario as identified in the HR&A market study
    - Tie target industries to analysis and relate to parcel sizes

Policy & Funding

- Identify funding mechanisms to eliminate or reduce costs for target industries to avoid the stigma of the “first in pays” policy for infrastructure improvements
MID-TERM RECOMMENDATIONS - TIER 2

Land Use

• Consider adoption of a Master Development Plan (MDP) utilizing the Manufacturing Competitiveness Act (MCA) for parcels in Tier 2 & 3.

• Benefits:
  • No other County or City in the State has taken advantage of this opportunity beyond Manatee County and the City of Bradenton, this provides a distinction specific to NW Manatee.
  • MCA is a state legislated process with specific guidelines meant to encourage manufacturing uses.
  • MDP / MCA requires an expedited, “one stop permitting” review process from State agencies (60 days maximum).
  • NW Manatee Study has already been established as an Eligibility Area.
  • The MDP would ONLY apply to manufacturing facilities that meet the uses outlined in Sectors 31-33 of the NAICS Code.
  • MDP establishes dimensional criteria such as setbacks, heights, and buffering.
  • Although no local site plan review is required, the user must have engineered site plans that are required to have a licensed professional certify that the proposed construction meets all local and state regulations.
  • Project can go directly to building permits.
  • The MDP acts as an overlay but does not eliminate the approved land uses.

• Advantages to targeted use:
  • Large single ownership parcels are well positioned to use the process.
  • Educate the large parcel owners on the benefits of the MDP and the expedited review process.
  • Offer assistance if owners wish to pursue this option - reduced fees, expedited MDP adoption process.
  • Can be accomplished by each owner individually or as a master plan for all three parcels together.
  • Each parcel currently has approval for 7,000,000 sq. ft. of light industrial use.
  • Process would allow for use of new performance standards, if adopted.
  • Amendment to the IL Designation and FIG Overlay could encourage this further by expanding the potential for manufacturing uses.
Transportation

- Continue dialogue with property owners within Tier 2 & 3 regarding a public/private partnership to extend public infrastructure (roads, water and wastewater) such as reservation/donation of road rights-of-way for Piney Point Road and Buckeye Road and utility easement corridors
- Continue to refine the Buckeye Road alternatives based on cost estimates and available alignments for proactive construction to serve Tiers 2 & 3
- Continue working with the MPO/FDOT on a new I-75 interchange to better serve the area

Potable Water & Sewer

- Master Wastewater Plan – Revisit the Plan relative to the timing and necessary upgrades to serve the build-out of Tiers 2 and 3
  - Consider master planning water/wastewater improvements to serve Tier 2 & 3 to include 30% construction plans
  - Determine timing for upgrades to the wastewater treatment to serve Tier 2 & 3 in addition to the growing residential demand on both the east and west sides of I-75

Reclaim Water

- Consider master planning a reclaim water system for future growth and reuse of effluent water generated by the wastewater treatment plant
  - Reclaim water is often considered critical to manufacturing users and is used for cooling and washing systems (there is a cost saving for using lowest grade water source)
  - Not critical to Warehouse/Distribution users

LONG-TERM RECOMMENDATIONS - TIER 2

Transportation

- Continue dialogue with property owners within Tier 2 & 3 regarding a public/private partnership to extend public infrastructure (roads, water and wastewater) such as reservation/donation of road rights-of-way for Piney Point Road and Buckeye Road and utility easement corridors
- Continue working with the MPO/FDOT on a new I-75 interchange to better serve the area
Potable Water & Sewer

• Master Wastewater Plan – Continue monitoring of the need for upgrades and/or expansion of the wastewater treatment plant to serve build-out of Tiers 2 and 3 and the growing residential demand on both the east and west sides of I-75

Reclaim Water

• Consider design/construction of a reclaim water system in the NW Manatee area for future growth and reuse of effluent water generated by the wastewater treatment plant
  
  • Reclaim water is often considered critical to manufacturing users and is used for cooling and washing systems (there is a cost saving for using lowest grade water source)
  
  • Not critical to Warehouse/Distribution users
  
  • Reclaim water is the most desirable source of non-potable water for both residential and non-residential users

1.7.3 TIER 3 RECOMMENDATIONS

SHORT-TERM RECOMMENDATIONS - TIER 3

Land Use

• Amend the Florida International Gateway Comprehensive Plan Overlay to allow expanded uses as created through the recommended Performance Standards in IL Future Land Use Designation
  
  • Currently Tier 3 has 1,773 acres of IL designation
  
  • Create performance standards to limit adverse impacts such as locational criteria, increased setbacks/perimeter landscape buffering, building heights, etc. to ensure compatibility with surrounding uses
  
  • Implement performance standards through the Land Development Code
  
  • Make these amendments specific to Port Manatee / NW Manatee Study Area
  
  • Assess the expanded use of performance standards east of I-75 (outside the NW Manatee Study Area)
Transportation

• Develop cost estimates for three alternative alignments of Buckeye Road to determine the feasibility of proactive construction to serve Tiers 2 & 3 development.
  • Magnitude of Tier 2 & 3 development could attract large scale users.
  • Current alignment
    • Constrained right-of-way with environmental concerns, power line and gas line easements
    • Expected to carry a large volume of domestic vehicles - conflicting with truck movements
  • Buckeye Road is critical to full build-out of Tier 2 & 3
  • Include intersection improvements and signalization at US 41 to serve truck turning movements
  • Update existing County cost estimates for alignment alternatives
  • Alternate alignment could be a dedicated industrial corridor
    • Potential heavy truck volume
    • Easy access and lack of traffic conflicts are attractive to end users
    • Alternative alignments north of the current Buckeye Road alignment provide a direct feeder to large parcels serving over 3,000 acres
    • Connection to US 41 could serve as the first leg of the Piney Point Road extension

• Retain the future Piney Point Road (extension) on the County’s Major Thoroughfare Plan for additional access to serve Tiers 2 & 3 and as a potential I-75 interchange location
• Continue working with the MPO/FDOT on a new I-75 interchange to better serve the area

Energy & Technology

• Create a competitive advantage with enhanced non-public infrastructure improvements
  • Wi-Fi (5G) - Investigate incentive options for proactive installation of improved service by local providers
  • Electrical Service - Encourage Florida Power & Light (FPL) to install a new substation to allow for redundant service that will help avoid interruptions to electrical services critical to industrial uses
Branding

• Create an identity / brand and marketing plan for the NW Area.

• Enhanced identification area-wide
  • Develop a name, a logo, signage and collateral materials (print & digital - web, social, tv) for the area
  • Consider wayfinding signage and gateway features along “entranceway” locations to the NW Manatee Area as opposed to solely Port Manatee
  • Consider including Port Manatee signage along I-75 near the Moccasin Wallow Road Interchange

• Focused Approach
  • Consider developing an area-wide master plan, including more detail of a unified vision
  • Identify Tier 2 & 3 as an Inland Port
  • Develop a database of competitive properties outside of the study area including location, asking and sales prices, existing infrastructure, planned improvements, and area features
  • Establish a working partnership with the Bradenton Area Economic Development Corporation and real estate entities for enhanced industrial recruitment to this specific area
  • Focus on target industries and the 10-year build-out scenario as identified in the HR&A market study
  • Tie target industries to analysis and relate to parcel sizes

Policy & Funding

• Identify funding mechanisms to eliminate or reduce costs for target industries to avoid the stigma of the “first in pays” policy for infrastructure improvements

MID-TERM RECOMMENDATIONS - TIER 3

Land Use

• Consider adoption of a Master Development Plan (MDP) utilizing the Manufacturing Competitiveness Act (MCA) for parcels in Tier 2 & 3.

  • Benefits:
    • No other County or City in the State has taken advantage of this opportunity beyond Manatee County and the City of Bradenton - this provides a distinction specific to NW Manatee
Land Use (continued)

- MCA is a state legislated process with specific guidelines meant to encourage manufacturing uses.
- MDP / MCA requires an expedited, “one stop permitting” review process from State agencies (60 days maximum).
- NW Manatee Study has already been established as an Eligibility Area.
- The MDP would ONLY apply to manufacturing facilities that meet the uses outlined in Sectors 31-33 of the NAICS Code.
- MDP establishes dimensional criteria such as setbacks, heights, and buffering.
- Although no local site plan review is required, the user must have engineered site plans that are required to have a licensed professional certify that the proposed construction meets all local and state regulations.
- Project can go directly to building permits.
- The MDP acts as an overlay but does not eliminate the approved land uses.

Advantages to targeted use:
- Large single ownership parcels are well positioned to use the process.
- Educate the large parcel owners on the benefits of the MDP and the expedited review process.
- Offer assistance if owners wish to pursue this option – reduced fees, expedited MDP adoption process.
- Can be accomplished by each owner individually or as a master plan for all three parcels together.
- Each parcel currently has approval for 7,000,000 sq. ft. of light industrial use.
- Process would allow for use of new performance standards, if adopted.
- Amendment to the IL Designation and FIG Overlay could encourage this further by expanding the potential for manufacturing uses.

Transportation

- Continue dialogue with property owners within Tier 2 & 3 regarding a public / private partnership to extend public infrastructure (roads, water and wastewater) such as reservation/donation of road rights-of-way for Piney Point Road and Buckeye Road and utility easement corridors.
- Continue to refine the Buckeye Road alternatives based on cost estimates and available alignments for proactive construction to serve Tiers 2 & 3.
- Continue working with the MPO/FDOT on a new I-75 interchange to better serve the area.
Potable Water & Sewer

- Master Wastewater Plan – revisit the Plan relative to the timing and necessary upgrades to serve the build-out of Tiers 2 and 3
  - Consider planning water/wastewater improvements to serve Tier 2 & 3 – 30% construction plans
  - Determine timing for upgrades to the wastewater treatment to serve Tier 2 & 3 in addition to the growing residential demand on both the east and west sides of I-75

Reclaim Water

- Consider design/construction of a Reclaim water system in the NW Manatee area for future growth and reuse of effluent water generated by the wastewater treatment plant
  - Reclaim water is often considered critical to heavy manufacturing users – used for cooling & washing systems (cost savings for using lowest grade water source)
  - Not critical to Warehouse/Distribution users
  - Reclaim water is the most desirable source of non-potable water for both residential and non-residential users

LONG-TERM RECOMMENDATIONS - TIER 3

Transportation

- Continue dialogue with property owners within Tier 2 & 3 regarding a public / private partnership to extend public infrastructure (roads, water and wastewater) such as reservation/donation of road rights-of-way for Piney Point Road and Buckeye Road and utility easement corridors
- Continue working with the MPO/FDOT on a new I-75 interchange to better serve the area

Potable Water & Sewer

- Master Wastewater Plan – continued monitoring of the need for upgrades and/or expansion of the wastewater treatment plant to serve build-out of Tiers 2 and 3 and the growing residential demand on both the east and west sides of I-75

Reclaim Water

- Consider design/construction of a Reclaim water system in the NW Manatee area for future growth and reuse of effluent water generated by the wastewater treatment plant
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## NW MANATEE - RECOMMENDATION MATRIX

<table>
<thead>
<tr>
<th>TIER</th>
<th>SHORT-TERM</th>
<th>MID-TERM</th>
<th>LONG-TERM</th>
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<tr>
<td><strong>Land Use</strong></td>
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<tr>
<td>Tier 1</td>
<td>• Expand existing Industrial Heavy (IH) Future Land Use classification</td>
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<tr>
<td>Tier 2</td>
<td>• Amend existing Industrial Light (IL) Future Land Use classification to allow more intense land uses</td>
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<tr>
<td>Tier 3</td>
<td>• Amend the FIG Overlay to allow expanded uses through performance standards in the IL land use classification</td>
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<tr>
<td><strong>Transportation</strong></td>
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<tr>
<td>Tier 1</td>
<td>• Work with MPO/FDOT on a new I-75 Interchange</td>
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</table>
| Tier 2 | • Develop cost estimates for alternative alignments of Buckeye Rd.  
• Retain Piney Point Rd. extension on Major Thoroughfare Plan  
• Work with MPO/FDOT on a new I-75 Interchange | • Continue dialogue regarding partnership to extend infrastructure, reservation/donation of ROW’s for Piney Point and Buckeye Roads  
• Refine Buckeye Rd. cost for improvements  
• Coordinate with property owners regarding public/private partnership to extend public infrastructure (roads, water & )  
• Work with MPO/FDOT on a new I-75 Interchange | • Coordinate with property owners regarding public/private partnership to extend public infrastructure (roads & utility easements)  
• Work with MPO/FDOT on a new I-75 Interchange | |
| Tier 3 | - | - | - |
| **Potable Water and Sewer** | | | |
| Tier 1 | • Fund the design and construction of public improvements to water and sewer along US 41 | - | - |
| Tier 2 | - | • Master Wastewater Plan - revisit to the timing and necessary upgrades to serve build-out | - | |
| Tier 3 | - | - | - |
| **Reclaim Water** | | | |
| Tiers 1, 2 & 3 | - | • Master plan a reclaim water system for future growth and reuse of effluent water | - | |
| **Policy and Funding** | | | |
| Tiers 1, 2 & 3 | • Identify incentive to address the “first in pays” policy regarding infrastructure improvements | - | - |
| **Branding** | | | |
| Tiers 1, 2 & 3 | • Create an identity / brand for marketing and unified messaging | - | - |
APPENDIX A
List of Maps & Tables

APPENDIX:

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Table 14: Regional Stormwater Management System
Within the Primary Study Area Buckeye Road will become an increasingly important corridor as development, particularly in Tiers 2 and 3, occurs. In the future, roadway improvements will be required to support projected growth within the area. However, the current Buckeye alignment, extending from US 41 east to I-75, has multiple constraints along the western portion of the roadway that will prohibit substantial widening or other roadway improvements, most of which are utility conflicts.

Alternative alignments of the western portion of existing Buckeye Road which avoid an existing “pinch point” near Bud Rhoden Road have been considered and are shown in the conceptual diagram above. The existing Buckeye roadway alignment is labeled “A.”

One alternative, referred to as “Alternative B”, considers a relocation of the roadway to the south of the study area. This alignment would impact and require coordination with multiple property owners in the area however a large portion of it would improve existing Chapman Road.

“Alternative C” considers a direct relocation of the roadway north of the HRK site and extending from Piney Point Road to existing Buckeye Road. This alternative would provide additional access to Tier 2.

“Alternative D” considers relocating the western portion of Buckeye Road to instead extend from a planned north/south connector identified in the West Buckeye Plan. An additional roadway would then extend from this planned connector to Piney Point Road. This alternative begins to build a larger roadway network within the northwest area and does the most to open up access to the middle portion of the Study Area.
ANTICIPATED LAND USES

Considering various development conditions within the Study Area as well as contributing factors outside of the area, significant flexibility exists regarding the future development potential of the Study Area. While flexibility is important to property owners and developers, a realistic understanding of what likely will occur with current market conditions should be merged with the long term goals of Manatee County.

The greatest target development potential in the Study Area exists along the US 41 Corridor in Tier 1 and within Port Manatee property. The majority of Tier 1 and the western portion of the Study Area should and will likely be developed as heavy and light industrial uses. This projected development is consistent and compatible with existing development of the area.

Moving east, light industrial and commercial uses, which may also include warehousing and distribution uses, will likely serve as a transition in Tier 2 between future residential development to the east and heavier industrial uses in Tier 1 to the west. Light industrial and commercial uses may also be appropriate uses in transition areas to the south of Buckeye Road which are close to existing residential development to the southeast. Additionally, light industrial and commercial uses in the northeast portion of the Study Area, a butting I-75 will compliment a planned future direct connector from I-75 to Port Manatee.

Due to existing residential growth demands throughout Manatee County as well as to the north in Hillsborough County, it is likely that a portion of the Study Area will be developed as residential uses. Considering approved residential development plans in place for the large tracts of land in Tiers 2 and 3 and the dual entitlement of the Florida International Gateway (FIG), it is realistic to expect this development to occur. Focusing residential development within the eastern portion of the Study Area, closer to I-75 will allow growth to occur without precluding industrial development to the west and will provide adequate buffering from heavier industrial uses. This may impact visibility of the industrial component further west; therefore consistent signage and branding is emphasized.
OVERVIEW

In 2015, with 7 million sq. ft. of industrial entitlements being held in close proximity to the I-4 Corridor along County Line Road, Plant City elected to make a significant public investment to spur private development of the entitled lands. Through re-appropriation of retained earnings from the water, sewer, and wastewater funds, the City funded the extension of approximately 3.2 miles of 12" water main and 1.5 miles of 8" sanitary force main along County Line Road. The total project cost an estimated $3.5 million and by facilitating shovel ready sites, this project is largely credited with advancing significant private investment.

DETAILS

• Development of entitled projects is estimated to generate approximately $24 million in revenue over 10 years through property tax revenue, building permit fees, impact fees, sales tax and utility revenue and franchise fees. Development is also estimated to create over 6,000 direct and indirect jobs over the next 10 years.

• Projects planned, entitled or announced to break ground since completion of the public investment include:
  A.) County Line Commerce Center totaling 200,000 sq. ft.
  B.) County Line Farms planned to total 2.3 million sq. ft.
  C.) Central Florida Commerce Center planned to total 895,000 sq. ft.
  D.) County Line Logistics Center planned to total 1.1 million sq. ft.
  E.) Red Rock Development including a planned 500,000 sq. ft.
  F.) Home Depot Distribution Center planned to total 800,000 sq. ft.
OVERVIEW

In 2014 Polk County began working with Jones Development Corporation on the development and the construction of a 300,000 sq. ft. FedEx distribution center at the northwest quadrant of US 27 and I-4 in northeast Polk County.

The County approved up to $1.5 million towards the construction of the North Ridge Trail, a road along the western boundary of the site that connects the site to Waverly Barn Road and US 27 to the north. The total cost of the North Ridge Trail was estimated at over $2.8 million with the County's $1.5 million portion funded through the North Ridge Community Redevelopment Agency.

In 2015 Walmart also announced plans to construct a 2-building, 2.2 million sq. ft. e-commerce fulfillment center on either side of the planned FedEx distribution center at the northwest quadrant.

The FedEx and Walmart facilities have completed construction and are operational. An additional 400,000 sq. ft. of industrial building are under construction at this time. This level of development also prompted a Love's truck stop to locate in the area.

DETAILS

• The FedEx distribution center was estimated to create over 400 jobs while the Walmart fulfillment center was estimated to add 1,500 jobs to the area.

• Construction of the FedEx facility included over $28 million in capital investment while the construction of Walmart's fulfillment center included approximately $200 million in capital investment.
OVERVIEW

Beginning as early as 2013, Hillsborough County worked with Amazon to facilitate the construction of the company’s planned 1.1 million sq. ft. wholesale trade customer fulfillment center at the intersection of College Avenue and I-75 in southwest Hillsborough County. With help from the County, Amazon was able to obtain the Economic Development Transportation Fund (EDTF) Grant from the State of Florida in order to extend 30th Street to 19th Avenue to the north. This was a key roadway link for Amazon as it provided a direct route to I-75 east of the site. The project invested more than $200 million into the project and created more than 1,000 permanent jobs.

The land where the Amazon facility located had an existing DRI approval that included industrial entitlements sufficient to meet Amazon’s needs.

DETAILS

• Hillsborough County worked in partnership with Amazon to secure grant funding for roadway improvements to provide a direct link to I-75.

• The project generated over $200 million in capital investment and more than 1,000 permanent jobs.

• Hillsborough County also provided Amazon with a $6 million, 7-year ad valorem tax exemption and $225,000 in local support as part of Florida’s qualified target industry (QTI) Tax Refund Program.
Manatee County is seeking to make a 6,700-acre area at the northwest corner of the jurisdiction a focus of regional economic development by encouraging new businesses and Port Manatee-related uses.

The Northwest Manatee County Master Plan study area is largely composed of vacant and agricultural land, some developed industrial and, to a lesser extent, residential development.

HR&A, as part of a team led by Stantec, has been retained to assess the Northwest Manatee County market to determine potential growth scenarios for various development uses. This report summarizes our high-level market assessment and the supply and demand characteristics that govern market-driven opportunities for the Study Area as well as our analysis of development demand potential.
<table>
<thead>
<tr>
<th>STUDY AREA FEATURES</th>
<th>GROWTH DRIVERS</th>
<th>ANALYSIS</th>
<th>OUTPUT</th>
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</thead>
<tbody>
<tr>
<td><strong>OPPORTUNITIES:</strong></td>
<td>1. Increased shipping activity at Port Manatee</td>
<td>1. Existing market conditions, trends, ongoing plans.</td>
<td>Range of potential development square footage and acreage associated with each of the three growth drivers</td>
</tr>
<tr>
<td>Abundant land</td>
<td>2. Capturing increased local demand for e-commerce distribution and warehousing facilities</td>
<td>2. Assumptions about future growth</td>
<td></td>
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<tr>
<td>Availability of incentives</td>
<td></td>
<td></td>
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<tr>
<td>Growing county</td>
<td>3. Expansion of local manufacturing output</td>
<td>3. Assumptions about industrial/warehousing SF and land acres to accommodate growth</td>
<td></td>
</tr>
<tr>
<td>Large land parcels</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Regional access</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Presence of Port Manatee</td>
<td></td>
<td></td>
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<tr>
<td><strong>CHALLENGES</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Limited utility network and unreserved capacity</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Insufficient roadway capacity</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lack of direct I-75 link</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Regional competition</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Growing residential development</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
EXISTING CONDITIONS
Using Manatee County GIS data, supplemented by information from Port Manatee and County staff, HR&A evaluated Study Area land to determine which parcels are most suitable for development, based on the criteria outlined on the previous page. The central parcel marked with hatch lines is potentially partially developable due to the presence of gypsum stacks and associated environmental challenges, while blue parcels are potentially fully developable.
# Existing Conditions

The Study Area’s location, available incentives, recent growth, and anchor port serve as important assets that can be leveraged to spur growth in the Northwest County Study Area.

## OPPORTUNITIES

<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
<th>Implications</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>LAND</strong></td>
<td>Abundant, inexpensive land, with a wide range of potential uses</td>
<td>Reduced development costs</td>
</tr>
<tr>
<td><strong>INCENTIVES</strong></td>
<td>Tax and other development incentives support industrial development feasibility</td>
<td>Reduced development and operating costs</td>
</tr>
<tr>
<td><strong>GROWTH</strong></td>
<td>Growing county population and spending</td>
<td>Growing workforce and consumer spending</td>
</tr>
<tr>
<td><strong>LAND OWNERSHIP</strong></td>
<td>Portions of the Study Area consist of large, single-owner land parcels</td>
<td>Increased potential for vision-oriented development</td>
</tr>
<tr>
<td><strong>REGIONAL ACCESS</strong></td>
<td>Access to major roads, 3.1 million located within a 60-minute drive</td>
<td>Suitable for uses that support e-commerce and logistics</td>
</tr>
<tr>
<td><strong>PORT</strong></td>
<td>Port Manatee serves as a regional economic anchor</td>
<td>Potential for growth in Port activities</td>
</tr>
</tbody>
</table>
### Existing Conditions

The Study Area faces a series of infrastructure challenges that complicate its competitive advantage relative to neighboring jurisdictions.

### CHALLENGES

<table>
<thead>
<tr>
<th><strong>LIMITED UTILITY NETWORK</strong></th>
<th>High upfront cost of extending parts of utility network throughout the Study Area</th>
<th>Increased development costs (first in pays)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>INSUFFICIENT ROADWAY CAPACITY</strong></td>
<td>Roadways cannot accommodate growth in freight vehicles</td>
<td>Increased freight shipping times and operating costs</td>
</tr>
<tr>
<td><strong>LACK OF DIRECT I-75 CONNECTION</strong></td>
<td>Nearest interchange is at Moccasin Wallow Road</td>
<td>Decreased transportation efficiency</td>
</tr>
<tr>
<td><strong>REGIONAL COMPETITION</strong></td>
<td>Further from I-4 Corridor than competing areas</td>
<td>Increased freight shipping times and operating costs</td>
</tr>
<tr>
<td><strong>GROWING RESIDENTIAL DEVELOPMENT</strong></td>
<td>Residential uses increasingly encroaching on Study Area</td>
<td>May come into conflict with new industrial/warehouse uses</td>
</tr>
</tbody>
</table>
HR&A’s analysis focuses on three primary drivers of economic growth, under the assumption that any combination of these may impact Manatee County’s economy over the next several decades.

**Drivers of Growth**

**INCREASED SHIPPING ACTIVITY AT PORT MANATEE**
Port Manatee is a critical anchor and economic growth generator for the Study Area and Manatee County as a whole. Increases in tonnage flowing through the port can have a catalytic impact on the development of supporting warehouse and storage space in the Study Area.

**CAPTURING INCREASED LOCAL DEMAND FOR E-COMMERCE DISTRIBUTION AND WAREHOUSING**
Neighboring Polk and Hillsborough Counties have seen significant growth in warehousing and distribution space over the last decade, a trend in line with growth in e-commerce sales. As e-commerce consumption grows in Manatee County, as a result of both population increase and changing consumer preferences, demand for supporting distribution space within close proximity of customers will also increase.

**EXPANSION OF LOCAL MANUFACTURING OUTPUT**
Light manufacturing is on the rise in Manatee County, and some of the largest industrial/flex developments ever built in the County are in progress. As this trend advances, the demand for suitable land will also continue to rise.
Drivers of Growth
For each of these drivers, HR&A developed three growth scenarios and estimated the resulting demand for new industrial and warehousing space, and developable land, by 2030.

<table>
<thead>
<tr>
<th>DRIVERS</th>
<th>GROWTH SCENARIOS</th>
</tr>
</thead>
<tbody>
<tr>
<td>PORT MANATEE</td>
<td>Modest</td>
</tr>
<tr>
<td>E-COMMERCE</td>
<td>Modest</td>
</tr>
<tr>
<td>MANUFACTURING</td>
<td>Modest</td>
</tr>
</tbody>
</table>

OUTPUTS → Demand for additional industrial/warehouse square footage and land by 2030

HR&A produced a modest, enhanced, and aggressive scenario for each of the three drivers of local economic growth. These nine interchangeable scenarios are designed to give the County flexibility in assessing the growth potential for Manatee County’s economy based on the anticipated impact of investing in each driver. The year 2030 was selected as a benchmark to give the County a vision of what the Study Area might support within approximately ten years of early catalytic investments. HR&A also developed a twenty-year estimate for industrial, warehouse, and land acres, which can be found on page 55.
INCREASED SHIPPING ACTIVITY

AT PORT MANATEE
Increased Shipping Activity at Port Manatee

Port Manatee is one of eight major shipping ports in Florida, with a 4% share of shipping activity within the state as of 2017.

Of these eight, Port Manatee sees an annual shipping activity in line with similarly-sized facilities, but a fraction of neighboring Port of Tampa Bay’s 33 million tons.
Increased Shipping Activity at Port Manatee

The Port’s shipping activity has fluctuated between 2 and 5 million tons per year over the last decade, plus additional tonnage associated with the Port’s natural gas pipeline. 2018 was the Port’s most successful year since the recession.

Port Manatee Annual Shipping Activity (Tons in Millions)

Source: USACE, Waterborne Commerce Statistics Center, 2000-2017 data, Port Manatee, 2018 data

According to the U.S. Army Corps of Engineers (USACE), which collects information on waterborne trade, annual tonnage passing through Port Manatee is rebounding from its historic 2014 low of 2 million, almost exclusively driven by a rise in imports.
Increased Shipping Activity at Port Manatee

Port of Tampa Bay and Port Manatee are situated 22 miles apart and serve as the state’s primary Gulf Coast port facilities.

**PORT MANATEE**
- **PRIMARY IMPORTS**: Fruit and vegetable juices
- **PRIMARY EXPORTS**: Mineral/chemical fertilizers and scrap metal

**PORT TAMPA**
- **IMPORTS**: China, Trinidad & Tobago, South Korea
- **EXPORTS**: Brazil, India, Germany

Port of Tampa Bay’s proximity to Port Manatee, and its similar mix of imported and exported products, suggest that economic forces that impact one of these ports will almost certainly impact the other. HR&A analyzed the potential growth of the Tampa Bay maritime shipping economy to evaluate three possible trajectories for Port Manatee’s growth over the next ten years.
Increased Shipping Activity at Port Manatee
Port Manatee owns 1,100 acres at the western edge of the study area and serves as an economic anchor for Manatee County.
Increased Shipping Activity at Port Manatee

Facilities include over 900k SF of warehouse space and over 200 acres of developable land.

<table>
<thead>
<tr>
<th>Warehouse</th>
<th>Date Built</th>
<th>Size (SF)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>1984</td>
<td>30,000</td>
</tr>
<tr>
<td>2</td>
<td>1982</td>
<td>115,000</td>
</tr>
<tr>
<td>3</td>
<td>1988</td>
<td>35,000</td>
</tr>
<tr>
<td>4</td>
<td>1997</td>
<td>30,000</td>
</tr>
<tr>
<td>5</td>
<td>1995</td>
<td>5,000</td>
</tr>
<tr>
<td>6</td>
<td>1989</td>
<td>58,000</td>
</tr>
<tr>
<td>7</td>
<td>1999</td>
<td>100,000</td>
</tr>
<tr>
<td>8</td>
<td>2000</td>
<td>58,000</td>
</tr>
<tr>
<td>9</td>
<td>2001</td>
<td>171,000</td>
</tr>
<tr>
<td>10</td>
<td>2003</td>
<td>140,000</td>
</tr>
<tr>
<td>11</td>
<td>2007</td>
<td>174,000</td>
</tr>
<tr>
<td><strong>Total SF</strong></td>
<td></td>
<td><strong>916,000</strong></td>
</tr>
</tbody>
</table>

Port Manatee’s warehouse space includes 720,000 SF of dry storage and 200,000 SF of refrigerated storage, distributed across 11 facilities built between 1982 and 2007. The occupancy rate of these facilities is 85%. To be conservative, our growth projections assume that further increases in tonnage will result in full occupancy of existing warehouse space before additional facilities are required.
Increased Shipping Activity at Port Manatee
HR&A based Port-related growth scenarios on two levers of Port expansion.

TAMPA BAY SHIPPING ACTIVITY
HR&A evaluated potential growth in annual tonnage flowing through Tampa Bay, including Port of Tampa Bay and Port Manatee, resulting from growth in industries represented by the Bay’s import/export mix, and/or broader economic growth.

PORT MANATEE SHARE
HR&A also evaluated Port Manatee’s share of total Tampa Bay shipping activity, which has remained constant over the last ten years, and projected a modest growth in Port Manatee’s regional shipping share, resulting from improved competitive advantage for shipping goods relative to the Port of Tampa Bay.
Tampa Bay's overall shipping activity, which last peaked in 2005, has remained relatively stable for the past decade. HR&A evaluated two possible trajectories for regional shipping growth: The first would see annual shipping activity at Port of Tampa Bay and Port Manatee reach 150% of current levels, slightly exceeding pre-recession 2005 levels at 58.2 million tons per year; the second would see a 75% increase in existing annual tonnage, to 67.9 million, by 2030.
Increased Shipping Activity at Port Manatee
Scenario Results

HR&A tested three Port-related growth scenarios, each of which would require incrementally more warehouse space and open-air storage yards. In the modest growth scenario, total Tampa Bay annual tonnage would exceed 58 million, of which Port Manatee would capture 12% or 7.0 million by 2030. The enhanced scenario holds total tonnage constant at 150% of 2018 levels but increases Port Manatee’s share to 15%, resulting in 8.7 million tons per year passing through the Port. Finally, the aggressive scenario applies the significant (75%) growth in tonnage and preserves the increased Port Manatee share of the enhanced scenario, resulting in an annual tonnage figure for Manatee of 10.2 million in 2030. Port Manatee’s projected annual shipping activity under these scenarios is illustrated in the graph on the facing page. Note that 2030 tonnage in the enhanced and aggressive scenarios both far exceed any such figure since at least the year 2000.
Increased Shipping Activity at Port Manatee
Scenario Results

Port Manatee Annual Shipping Activity (Tons in Millions)

FOREIGN  DOMESTIC  TOTAL

10.2 M  8.7 M  7.0 M

4.9 M

Source: USACE, Waterborne Commerce Statistics Center, 2000-2017 data

HR&A Advisors, Inc.
Northwest Manatee County Market Analysis and Context for Future Growth | 21
### Increased Shipping Activity at Port Manatee

#### Scenario Results

<table>
<thead>
<tr>
<th>Scenario</th>
<th>2030 Total Port Manatee Activity</th>
<th>Total Demand for New Industrial SF</th>
<th>Total Demand for Land for Open-Air Storage</th>
<th>Total Demand for New Land</th>
<th>Total Demand for Land Off Port Property</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>EXISTING CONDITIONS</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4.8 M tons/year</td>
<td>916,000 SF (85% Occupied)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>MODEST</strong> Recovery Growth + Unchanged Share</td>
<td>7.0 M tons/year</td>
<td>400,000 SF (18 acres)</td>
<td>100 acres</td>
<td>0 acres (of 120 total)</td>
<td></td>
</tr>
<tr>
<td><strong>ENHANCED</strong> Recovery Growth + Increased Share</td>
<td>8.7 M tons/year</td>
<td>820,000 SF (38 acres)</td>
<td>125 acres</td>
<td>0 acres (of 165 total)</td>
<td></td>
</tr>
<tr>
<td><strong>AGGRESSIVE</strong> Significant Growth + Increased Share</td>
<td>10.2 M tons/year</td>
<td>1.2 M SF (54 acres)</td>
<td>150 acres</td>
<td>0 acres (of 200 total)</td>
<td></td>
</tr>
</tbody>
</table>

Using 2030 tonnage projections, HR&A estimated total demand for new industrial square footage and land to accommodate open-air storage. To ensure that any growth in the port maximizes existing Port Manatee facilities, we assumed that the first 138,000 SF of demand for new industrial space would fill vacant space in the existing Port warehouses. Similarly, we assumed that the 215 acres of developable land currently available on Port property would be the most attractive site for new industrial development and open-air storage built to accommodate annual tonnage growth. Figures for total demand for “new industrial square footage” and “land for open air storage” in each scenario above represent net new development. Total demand for land off Port property represents net acreage needed to accommodate growth that cannot entirely be contained within Port boundaries. We would assume that this spillover development would likely be accommodated in close proximity to the Port. These results assume that infrastructure investments will be made by the County and its partners, to accommodate growth generated by increased shipping at Port Manatee. Additionally, these results are market-based, and further analysis will be required to assess the viability of potentially necessary supportive infrastructure investments.
INDUSTRIAL MARKET CONTEXT
Manatee County’s industrial market is seeing inventory growth and a consistent decline in vacancy, indicating room for expansion.

In total, Manatee County has 24.5 million square feet of industrial and industrial flex space. Approximately 20%, or 5.4 million square feet, is manufacturing space. Between 2012 and 2018, the vacancy rate has decreased from approximately 12% to 2%; concurrently, there has been consistent absorption and growth in industrial inventory. The low vacancy rate, in parallel with inventory growth, indicates potential demand for additional industrial and flex space.
**Industrial Market Context**

Relative to neighboring Hillsborough and Polk Counties, Manatee County’s share of the region’s industrial and flex market is shrinking, with only 5% of space currently under development across the region.

Currently, Manatee County contains 13% of the region’s existing industrial and flex inventory while Polk County and Hillsborough County comprise 34% and 53%, respectively. However, the ratio of each county’s share in the region’s industrial inventory shifts when evaluating industrial deliveries between 2012 and 2018. Nearly 60% of recently built industrial properties are located in Polk County, whereas 35% of recent deliveries are located in Hillsborough County, and 8% are located in Manatee County. Manatee County’s relative share further narrows in the context of the industrial development pipeline. Polk County maintains its majority share of future and ongoing development, while Manatee County’s relative share of the pipeline decreases from 8% of recent deliveries to 5% of ongoing and pipeline development. Overall, while Polk County’s share of recent and future industrial development has increased over time, Manatee County’s share is declining.
Industrial Market Context

Since 2005, three developments larger than 100K SF have been built in Manatee County, including a FedEx facility built in the Study Area in 2009.

- **FedEx** 175K SF (2009)
- **Wellcraft Industrial Complex** 113K SF (2006)
- **SRQ Commerce Park** 420K SF (2014)

Source: CoStar

Although Manatee County has experienced a modest amount of recent industrial development, only a few developments above 100,000 SF have been built. Within the Study Area, the Palmetto FedEx ground distribution center was constructed in 2009 and expanded more recently; the center serves as a relief point for FedEx’s Tampa center. In the south part of the County, Benderson Development’s SRQ Commerce Park contains over 400,000 SF of industrial space, and its primary tenants are light manufacturing operations.
Industrial Market Context

Today, there are several major ongoing and proposed industrial projects in Manatee County.

While there has been a limited number of large industrial building deliveries in recent years, a few major ongoing and proposed developments suggest that further industrial growth in Manatee County could be supported.
Benderson Development’s Florida International Trade Port near the intersection of I-75 and U.S. 301 in the northwest region of the County currently contains 500,000 square feet of flex space, and an expansion of another 2 million square feet is possible. This expansion would allow for light industry, warehouses, commercial uses, and offices. As part of the additional development, Benderson Development would bring county sewer service to the area and add capacity to the intersection of U.S. 301 and 51st Avenue to accommodate the additional truck traffic that would be generated by an increase in industrial activity.

Demand for industrial flex space and the opportunity for job creation have factored into Manatee County’s decision to fast-track the development at Harrod Properties’ Gatewood Corporate Center. By the end of 2018, 320,000 SF at the Gatewood Corporate Center was built, and currently, an additional 120,000 SF is under construction. In total, Harrod Properties plans to build seven buildings on the site located near I-75 in the southeast region of the County. Similar to the Florida International Trade Port, tenants will likely consist of light manufacturing operations and tenants looking to lease warehouse and distribution space.
CAPTURING INCREASED LOCAL DEMAND FOR E-COMMERCE DISTRIBUTION AND WAREHOUSING
E-Commerce Distribution and Warehousing

Regional distribution space, partially built to support e-commerce in Central Florida, is concentrated in Polk County and accounts for a disproportionately high share of that County’s total industrial inventory.

Between the Polk County, Hillsborough County, and Manatee County, approximately 33 million out of a total of 181 million square feet, or 18%, of the industrial inventory, is distribution space. More than half of the 33 million square feet of distribution space is located in Polk County, while only 4%, or 1.3 million square feet, is located in Manatee County. Distribution space comprises nearly 30% of Polk County’s total industrial inventory whereas distribution space comprises only 5% of Manatee County’s total industrial inventory. The majority of regional distribution space is located in Polk County, and distribution space accounts for a higher share of Polk County’s overall industrial inventory when compared to the allocation of industrial inventory in Hillsborough and Manatee Counties.
E-Commerce Distribution and Warehousing
Recently built warehouse and distribution space for e-commerce and shipping companies is clustered along the I-4 corridor, from southern Hillsborough County to Orlando.

Access to I-4, a highway connecting two significant population centers, has likely contributed to the concentration of distribution space along this corridor across both Hillsborough and Polk County. Examples of recent developments located along I-4 include a 1 million square foot Amazon facility, a 650,000 square foot Best Buy distribution center, a 300,000 square foot FedEx distribution center, and a 2.2 million square foot Walmart facility. In the case of Polk County, a combination of infrastructure investments and an ideal geographic location factored into its competitive advantage in attracting significant distribution operations.
E-Commerce Distribution and Warehousing

By comparison, Manatee County is home to smaller warehousing and distribution operations.

In addition to the FedEx facility in the Study Area, the northwest region of the County contains Sysco and Amazon within the Gulfcoast Corporate Park. South of Manatee River, Flowers Baking Company and Bealls have built distribution centers.
E-Commerce Distribution and Warehousing
Population growth in Manatee County will contribute to increasing consumer demand for e-commerce products.

Thorough adjacent counties currently account for a sizable share of regional distribution space, Manatee County has the opportunity to capture its own increasing spending potential going forward. The population Manatee County has grown from approximately 342,000 in 2013 to 394,000 in 2018. This upward growth trend will likely continue, and Manatee County’s population is expected to increase by 10% over the next five years to reach a population of 432,000 by 2023.
E-Commerce Distribution and Warehousing

Industrial employment is increasing in line with growing demand for transportation and warehousing services.

Our team analyzed employment levels in trade, transportation, and utilities between 2007 and 2017. Since 2010, jobs in trade, transportation, and utilizes have grown by an average annual rate of 2%, increasing from approximately 19,000 jobs in 2010 to nearly 26,000 jobs in 2017. Increasing employment in these industries suggests supportable demand for industrial development.

Source: Bureau of Labor Statistics, Quarterly Census of Employment and Wages
E-Commerce Distribution and Warehousing
HR&A based e-commerce growth scenarios on two levers.

GROWTH OF ONLINE SALES
HR&A evaluated potential growth in the annual share of online sales, resulting from broader growth in national e-commerce.

STUDY AREA SHARE OF COUNTY INDUSTRIAL DEVELOPMENT
HR&A also evaluated potential increases in the Study Area’s share of Manatee County manufacturing jobs, resulting from improved competitive advantage and infrastructure improvements.
E-Commerce Distribution and Warehousing
Lever 1: Growth of Online Sales

The first lever of the methodology evaluates both the growth of e-commerce and the growth of overall retail sales in Manatee County as a function of the County’s increasing population. Nationally, total e-commerce sales have increased at an average annual rate of 14% between 2012 and 2017, and overall sales have been growing more rapidly in recent years. The e-commerce share of total retail sales almost doubled between 2012 and 2018. In 2012, 5% of total retail sales were online sales; this share increased to nearly 10% by 2018.

Source: US Census Bureau Quarterly E-Commerce Report
HR&A evaluated the unmet online spending potential in Manatee County to determine the additional warehouse and distribution space that would be required. In line with Manatee County’s growing population and growing consumer demand, total retail sales in the County will likely continue increasing until 2030. To estimate total e-commerce spending over the next 10 years, the team assumed that retail spending will continue to increase in line with the County’s growing population. The portion of that spending that will be generated through e-commerce, currently 10%, is also expected to grow to: 19% in the modest growth scenario, 20% in the enhanced growth scenario, and 22% in the aggressive growth scenario.
In the modest scenario, the 0.8% current annual rate of growth in the online sales share of total retail sales is projected to continue; by 2030, in this scenario, online sales will comprise 19.2% of total sales, or $1.1B. Furthermore, in the modest scenario, HR&A estimates that the Study Area could reasonably capture 25% of the additional warehouse and distribution space that would be required in the County. In an enhanced scenario, the growth in the share of online sales is projected to increase at a slightly higher rate, resulting in a 21.6% share of total retail sales, or $1.2B by 2030. HR&A estimates that the Study Area could capture 50% of the additional industrial inventory that would be required in the County. Finally, in the most aggressive scenario, the growth in the share of online sales is projected to increase at a rate of 1% annually, resulting in a share of 24% of all retail sales, or $1.3B, by 2030. In the most aggressive scenario, likely requiring more significant investment, the Study Area could capture 75% of the County’s industrial development.
Nationally, an additional $1 billion in e-commerce sales results in the demand for an additional 1.25 million square feet of industrial space. Applying this ratio to online spending growth in Manatee County supports a forecast of demand for warehouse space over the next 10 years that would be required to accommodate an increase in e-commerce sales. This analysis assumes that warehouse and distribution space required to accommodate incremental demand from Manatee County consumers will be located within Manatee County. The second lever of the e-commerce growth scenario, the Study Area share, assesses different shares of the additional warehouse and distribution space in Manatee County that the Study Area could capture.

Source: Forrester Research, CBRE Research, 2018, “How Has E-commerce Shaped Industrial Real Estate Demand?”
Today, the Northwest region of Manatee County, which includes the Study Area, contains 20% of all industrial properties in Manatee County. However, over 80% of ongoing and pipeline development is taking place in the Northwest quadrant. While this is promising for the Study Area, all development taking place in the Northwest quadrant is taking place to its south, in or near Bradenton. The shift of ongoing and future development to the Northwest region indicates that the development of the Study Area is not necessarily constrained by historical trends or concentration of existing inventory. Through strategic investments, the Study Area has the capacity to capture a larger share of future industrial development.
HR&A tested several 2030 e-commerce growth scenarios based on variations in two levers: the increase in online sales and the Study Area’s share of total new industrial development in Manatee County. In all scenarios, online retail sales are expected to expand in Manatee County. Different levels of investment in infrastructure or relocation incentives could enable the Study Area to capture between 25-75% of the additional warehouse and distribution space that would be required to support increasing e-commerce spending.
The range of potential development is calculated through the application of the ratio of additional e-commerce sales to the warehouse and distribution space that would be required. Although the FAR could vary depending on the ideal density of each development or requirements for additional parking or vehicle circulation space, all scenarios assume density in line with similar properties. In the modest scenario, 220,000 SF of additional industrial space and 20 acres of land would be required. In the enhanced scenario, 480,000 SF of additional industrial space and 44 acres of land would be required. In the aggressive scenario, 780,000 SF of industrial space and 72 acres of land would be required. In total, e-commerce growth could spur demand for between 220,000-780,000 square feet of new industrial space and between 20-72 acres of additional land by 2030. These results assume that infrastructure investments will be made by the County and its partners to accommodate growth generated by increased e-commerce spending. Additionally, these results are market-based, and further analysis will be required to assess the viability of supportive infrastructure investments.
EXPANSION OF LOCAL MANUFACTURING OUTPUT
HR&A based manufacturing growth scenarios on two levers.

GROWTH OF MANUFACTURING JOBS
HR&A evaluated potential growth in manufacturing, resulting from efforts to maintain and attract manufacturers to the Manatee County. A ratio of 650 SF per worker, determined through an analysis of recently delivered industrial properties in Manatee, Polk, and Hillsborough Counties, was used to establish industrial space projections.

STUDY AREA SHARE OF COUNTY MANUFACTURING JOBS
HR&A also evaluated potential increases in the Study Area’s share of Manatee County manufacturing jobs, resulting from improved competitive advantage and infrastructure improvements.
Employment in manufacturing experienced a slight upward trend between 2014-2017 despite remaining relatively stagnant. In 2007, there were approximately 10,000 manufacturing jobs in Manatee County, and the number of jobs declined to approximately 7,800 in 2009. Since 2009, manufacturing jobs have remained relatively stable, and in the past few years, between 2014 and 2017, manufacturing jobs have somewhat recovered.

HR&A’s scenarios range from no additional near-term growth in manufacturing jobs to a growth rate that allows for recovery to pre-recession manufacturing employment levels within a decade. In the modest scenario, no manufacturing jobs are added. In the enhanced scenario, the County sees a moderate level of growth in manufacturing jobs, adding approximately 1,300 jobs. In the most aggressive scenario, the County could potentially add over 1,600 manufacturing jobs to recover to previous employment levels.
HR&A evaluated three possible paths for the Study Area’s share in new manufacturing jobs, resulting in an overall share ranging from 2% to 10% of the County’s total manufacturing jobs. In the modest scenario, there is no growth in manufacturing jobs, and the Study Area does not add any jobs. The enhanced scenario estimates the recent growth trend in manufacturing jobs will continue to 2030, and the Study Area could capture 25% of the additional manufacturing jobs, resulting in an additional 320 jobs in the Study Area and an overall share of 5% in the County. The aggressive scenario estimates a growth rate that is 25% higher than the recent growth trend and projects that the Study Area could capture the enhanced scenario’s 50% of the additional manufacturing jobs. In the most aggressive scenario, the Study Area could add up to 820 new manufacturing jobs.
Manufacturing job growth can potentially spur demand for up to 530,000 SF of new manufacturing space and up to 50 acres of land by 2030. Through comparing the existing manufacturing space inventory to the number of manufacturing jobs, HR&A used a ratio of 650 SF per employee to estimate future space demands. HR&A utilized a FAR of 0.25 to calculate land requirements based on projections for additional manufacturing space.

In the modest scenario, no growth in manufacturing jobs indicates that additional space or land would not be required. The enhanced scenario would require 210,000 SF of space and 19 acres of land in the Study Area for 320 new jobs. Finally, the aggressive scenario would require 530,000 SF of space and 50 acres of land in the Study Area for 820 new jobs. These results assume that infrastructure investments will be made by the County and its partners to accommodate growth generated by local manufacturing growth. Additionally, these results are market-based, and further analysis will be required to assess the viability of supportive infrastructure investments.
For each of the three drivers, HR&A developed three growth scenarios and estimated the resulting demand for new industrial and warehousing space, and developable land, by 2030 and 2040, as presented on the following pages.

<table>
<thead>
<tr>
<th>DRIVERS</th>
<th>GROWTH SCENARIOS</th>
</tr>
</thead>
<tbody>
<tr>
<td>PORT MANATEE</td>
<td>Modest</td>
</tr>
<tr>
<td></td>
<td>Enhanced</td>
</tr>
<tr>
<td></td>
<td>Aggressive</td>
</tr>
<tr>
<td>E-COMMERCE</td>
<td>Modest</td>
</tr>
<tr>
<td></td>
<td>Enhanced</td>
</tr>
<tr>
<td></td>
<td>Aggressive</td>
</tr>
<tr>
<td>MANUFACTURING</td>
<td>Modest</td>
</tr>
<tr>
<td></td>
<td>Enhanced</td>
</tr>
<tr>
<td></td>
<td>Aggressive</td>
</tr>
</tbody>
</table>

**DEMAND OUTPUTS**

Demand for additional industrial/warehouse square footage, land by **2030/2040**.
## Growth Scenario Results

**Target Year: 2030**

<table>
<thead>
<tr>
<th>DRIVERS</th>
<th>GROWTH SCENARIOS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>PORT MANATEE</strong></td>
<td><strong>400,000 SF</strong> (Total Acreage: 120 acres Off-Port Acreage: 0 acres)</td>
</tr>
<tr>
<td><strong>E-COMMERCE</strong></td>
<td><strong>820,000 SF</strong> (Total Acreage: 165 acres Off-Port Acreage: 0 acres)</td>
</tr>
<tr>
<td><strong>MANUFACTURING</strong></td>
<td><strong>1,200,000 SF</strong> (Total Acreage: 200 acres Off-Port Acreage: 0 acres)</td>
</tr>
<tr>
<td><strong>DEMAND OUTPUTS</strong></td>
<td><strong>220,000 SF</strong> (20 acres)</td>
</tr>
<tr>
<td></td>
<td><strong>480,000 SF</strong> (45 acres)</td>
</tr>
<tr>
<td></td>
<td><strong>780,000 SF</strong> (70 acres)</td>
</tr>
<tr>
<td></td>
<td><strong>0 SF</strong> (0 acres)</td>
</tr>
<tr>
<td></td>
<td><strong>210,000 SF</strong> (20 acres)</td>
</tr>
<tr>
<td></td>
<td><strong>530,000 SF</strong> (50 acres)</td>
</tr>
<tr>
<td></td>
<td><strong>620,000 SF</strong> (20 off-Port acres plus circulation space)</td>
</tr>
<tr>
<td></td>
<td><strong>1.5M SF</strong> (65 off-Port acres plus circulation space)</td>
</tr>
<tr>
<td></td>
<td><strong>2.5M SF</strong> (120 off-Port acres plus circulation space)</td>
</tr>
</tbody>
</table>

### PRELIMINARY RESULTS

Manatee County could potentially develop between **620,000 SF and 2.5 million SF of industrial space**, which translates to between 20 and 120 acres of land in the Study Area by 2030. HR&A’s approach is designed to provide the County with flexibility to assess the growth potential for the County’s economy based on the anticipated impact of investing in each driver. Varying levels and sets of investments could potentially focus on specific drivers or benefit all three drivers for industrial growth in the Study Area.
The County could work to increase the chances of attracting up to 2.5 million square feet of industrial users by focusing on two strategic areas: increasing the development capacity of the Study Area through investment in infrastructure; and stimulating market demand through investments in physical access, branding and visibility, and incentives. Above, we have laid out interventions that the County can advance with its partners to catalyze between 620,000 and 2.5 million SF of development in the Study Area. Ultimately, the extent to which these interventions are successful will also depend on influences beyond the County’s control, such as Port investment, trade fluctuations, macroeconomic conditions, and other external variables.
### Growth Scenario Results
**Target Year: 2040**

<table>
<thead>
<tr>
<th>DRIVERS</th>
<th>GROWTH SCENARIOS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>PORT MANATEE</strong></td>
<td>1,000,000 SF (Total Acreage: 185 acres)</td>
</tr>
<tr>
<td></td>
<td>2,200,000 SF (Total Acreage: 310 acres)</td>
</tr>
<tr>
<td></td>
<td>3,300,000 SF (Total Acreage: 430 acres)</td>
</tr>
<tr>
<td><strong>E-COMMERCE</strong></td>
<td>490,000 SF (45 acres)</td>
</tr>
<tr>
<td></td>
<td>1,100,000 SF (100 acres)</td>
</tr>
<tr>
<td></td>
<td>1,700,000 SF (160 acres)</td>
</tr>
<tr>
<td><strong>MANUFACTURING</strong></td>
<td>0 SF (0 acres)</td>
</tr>
<tr>
<td></td>
<td>390,000 SF (35 acres)</td>
</tr>
<tr>
<td></td>
<td>1,000,000 SF (95 acres)</td>
</tr>
<tr>
<td><strong>DEMAND OUTPUTS</strong></td>
<td>1.5M SF (45 off-Port acres plus circulation space)</td>
</tr>
<tr>
<td></td>
<td>3.7M SF (230 off-Port acres plus circulation space)</td>
</tr>
<tr>
<td></td>
<td>6.0M SF (470 off-Port acres plus circulation space)</td>
</tr>
</tbody>
</table>

By 2040, Manatee County could potentially develop between 1.5 and 6.0 million SF of industrial and warehouse space, which translates to up to 470 acres of land in the Study Area.

The opportunity for up to 2.5 million SF of new industrial development implies that there is future potential for the Study Area to operate as an anchor for economic development. Projections for the year 2030 would only require 140 acres of the Study Area’s off-Port developable land. Projections for the year 2040, by which time up to 6 million SF of new industrial development could be required, suggest that up 275 acres of the Study Area’s developable land could be utilized by that year.
In Manatee County, **boat building** is the largest manufacturing industry that has recently experienced growth. Although 2008-10 saw the closure of three manufacturers – Wellcraft, Hydro-Sports, and Donzi Marine – a surge in boat sales buoyed by an improved economy has generated new demand for local boat manufacturers, such as Hann Powerboats and Chris-Craft\(^2\). Boats represent the 4\(^{th}\) largest export at Port Manatee, and growing, suggesting that new and growing local boat manufacturers seeking space could benefit from proximity to the Port. Between 2010-2019, employment in **furniture manufacturing** has grown in Manatee County, and the outdoor furniture manufacturer Windward Design Group signed a lease for a 280,000 SF space in Manatee County in 2018\(^3\). Since 1999, fire truck manufacturer Pierce Manufacturing has been building **heavy duty fire trucks** in the County and is among the 20 largest employers in the Bradenton area\(^4\).

The manufacturing sector in Manatee County is growing and diversifying, suggesting that the County should look beyond the top five industries listed below. Tenants at Florida International Trade Port and Gatewood Corporate Center, both profiled on page 29, include: Cosentino Surfaces, a flooring, kitchen, and bathroom surfaces supplier based in Spain\(^5\); RND Automation, an industrial equipment supplier; MDC Packaging Machinery, a packaging machinery manufacturer; and Liquid Bottles, a glass and plastic bottle distributor.

### TOP 5 MANUFACTURING INDUSTRIES IN MANATEE COUNTY (2019)\(^1\)

<table>
<thead>
<tr>
<th>DESCRIPTION</th>
<th>2010 JOBS</th>
<th>2019 JOBS</th>
<th>2010 - 2019 % CHANGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Fruit and Vegetable Canning</td>
<td>1,060</td>
<td>840</td>
<td>(21%)</td>
</tr>
<tr>
<td>2. Boat Building</td>
<td>195</td>
<td>750</td>
<td>285%</td>
</tr>
<tr>
<td>3. Furniture Manufacturing</td>
<td>285</td>
<td>605</td>
<td>113%</td>
</tr>
<tr>
<td>4. Heavy Duty Truck Manufacturing</td>
<td>0</td>
<td>415</td>
<td>Insf. Data</td>
</tr>
<tr>
<td>5. Medical Equipment Manufacturing</td>
<td>620</td>
<td>415</td>
<td>(34%)</td>
</tr>
</tbody>
</table>

\(^1\)Source: EMSI
\(^2\)Source: Bradenton Herald, “Manatee’s marine industry back to building boats”, June 4, 2012
\(^3\)Source: Sarasota Magazine, “Furniture Marker Leases Huge New Space”, May 10, 2018
\(^4\)Source: Bradenton Area EDC, Largest Employers
\(^5\)Source: Florida Business Observer, “Cosentino Surfaces to be first tenant in Benderson industrial project”, Mar 15, 2019
Manatee County launched its Economic Development Incentive Program in 2009 and has since deployed and pledged over $12.6M in incentives. During the 2017-2018 fiscal year, Manatee County pledged $234,000 in incentives for 10 private sector employers to create 279 jobs with an average wage of $67,000\(^1\). Air Products, near Port Manatee, is among the employers who have taken advantage of this program. In early 2019, the County was also in the process of negotiating incentives for an employer interested in locating to the Florida International Trade Port\(^2\).

The County’s incentive programs require the creation of quality, high-wage jobs within the County. These incentives include: **rapid response services** to expedite due diligence processes; funding from a **multimodal transportation impact fee**; **Economic Development Ad Valorem Tax Exemption (EDAVTE)**, allowing for the exemption of up to 100% of the assessed value of all improvements to real property made by new businesses or expanding existing businesses; and the **Economic Development Incentive Grant (EDI)** for job creation. Within the Study Area, the Port Improvement District TIF could potentially fund economic development activities, infrastructure improvements, and capital improvements to Port Manatee. The Planned Development Encouragement Zone, Florida International Gateway, and Manufacturing Development Program encourage either port-compatible or industrial and manufacturing uses in the Study Area.

\(^1\)Source: Herald Tribune, “Manatee County uses incentives to lure companies paying high wages”, Dec 18, 2018

\(^2\)Source: The Florida Times-Union, “Commission approves expansion of Ellenton industrial park”, Jan 10, 2018
By 2030, the Study Area could accommodate up to 2.5M SF of new uses, an amount which could grow to 6M SF by 2040. This growth could be accommodated in different sections of the Study Area, depending on a range of considerations. The following pages identify five factors that could influence the prioritization of parcels for near-term development: access to I-75, proximity to the Port, visibility from I-75, adjacency to existing residential uses, and environmental considerations.
In the near-term, the County could prioritize the development of parcels along the corridors that lead to highway access via the current interchange at Moccasin Wallow Road.
Maritime uses should prioritize development within Port land and western parcels closest to the Port. Manufacturers that could capitalize on close proximity to the Port could consider locating to the parcels on or adjacent to Port land.
Visibility from I-75 is another potential driver of development within the Study Area. Prospective tenants could benefit from the branding and advertising associated with adjacency to I-75.
A potential site-specific constraint on new development includes proximity to existing residences. Additionally, the central parcel marked with hatch lines is potentially only partially developable due to the presence of gypsum stacks and associated environmental challenges. Parcels without these constraints could be more appealing development targets in the near-term.
Key Near-Term Recommendations

1. **District Promotion**: Devise and deploy a campaign to raise awareness of the benefits of developing industrial product in the study area – with an emphasis on manufacturing and ecommerce uses. This campaign would highlight the area’s competitive advantages, including: abundant land, availability of incentives, its position within a growing county, availability of large land parcels, connections to regional access routes, and presence of Port Manatee.

2. **Water and Sewer Infrastructure**: Prioritize investments in Tier 1 water and sewer infrastructure that incentivize the development of industrial space to accommodate new manufacturing and ecommerce operations, and make unused sewer plant capacity available for near-term industrial development projects.

3. **Access Improvements**: Pursue funding to improve access to the study area from I-75. Physical interventions may include expanding roadway capacity on US-41 and developing new north-south access roads between Buckeye and Moccasin Wallow Roads.
Northwest County Plan

Existing Conditions and Issues Identification, Marketing Analysis and Context for Future Growth, & Recommendations Report