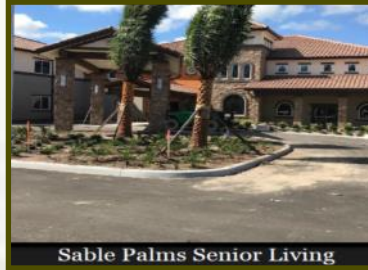




2017 ANNUAL REPORT



Florida Power & Light Operations Center



Sable Palms Senior Living



Chipotle Mexican Grill

GROWTH AND DEVELOPMENT TRENDS IN THE CITY OF PALM COAST

COMMUNITY DEVELOPMENT DEPARTMENT



2017 ANNUAL REPORT

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SECTION 1: OVERVIEW

INTRODUCTION

The Community Development Department has prepared this annual report in order to summarize growth and development trends occurring in the City, and also better project growth in the future. In addition, this annual report is provided to both public and private agencies in order to better coordinate future growth with infrastructure needs and services.

The majority of data displayed in this report is orientated to traffic analysis zones, or TAZs, which are the smallest geographic units that the City tracks for growth data and are utilized in the City's transportation modeling efforts. Building permits, Certificates of Occupancy, and development approvals are tracked and referenced to TAZs by the Community Development Department. Each TAZ is numbered on the maps and throughout the report will be referenced for the reader's benefit and use.

GENERAL DEMOGRAPHICS

A comparison of the 2010 and 2016 demographics using the 5-year American Community Survey (ACS) is provided below. A comparison between the 2010 ACS and the latest 5-year ACS shows that the percentage of total population under 18 years of age in the City decreased while the percentage of total population over 65 years old increased. This is reflected in the increase in median age from 44.4 years to 47.6. Overall, the City continues to age and tends to be older than the national average in terms of median age and percentage of population 65 years and older.

FIGURE 1.1 — GENERAL DEMOGRAPHICS TABLE

	City of Palm Coast 5-Year American Community Survey (2006-2010)	City of Palm Coast 5-Year American Community Survey (2012-2016)	National 5-Year American Community Survey (2012-2016)
% of Population Under 18 Years	21.30%	19.8%	23.1%
% of Population 65 Years and over	21.8%	26.6%	14.5%
Median Age	44.4	47.6	37.7
Average Household Size	2.51	2.81	2.64
Median Household Income	\$48,042	\$49,207	\$55,322
Per Capita Income	\$23,044	\$23,187	\$29,829
Families Below Poverty Level	8.70%	8.80%	11.0%
Household Units	27,184	28,818	117,716,237
Tenure of All Occupied Housing Units (Owner Occupied)	85.9%	77.0%	63.9%

POPULATION ESTIMATES / PROJECTIONS

The Bureau of Economic Business Research (BEBR) provides population estimates of the City's population every April 1st. Based on these estimates, the City's population grew by about 7.3% between 2013 and 2017 (See Figure 1.2).

FIGURE 1.2 — BUREAU OF ECONOMIC BUSINESS RESEARCH POPULATION ESTIMATES AND GROWTH

	2013	2014	2015	2016	2017
Population	77,068	78,046	79,821	81,184	82,760
Growth Rate	0.81%	1.27%	2.27%	1.71%	1.94%

RATES TABLE

Based on the BEBR population projections for Flagler County (Medium Projection), the City can generate population projections as a share of the County projections. The population projection indicates that by 2040, the City's population will double to about 158,577. These projections have been adjusted based on BEBR projections as noted in the footnotes below (See Figure 1.3 and 1.4 below).

FIGURE 1.3 — BEBR POPULATION PROJECTIONS TABLE

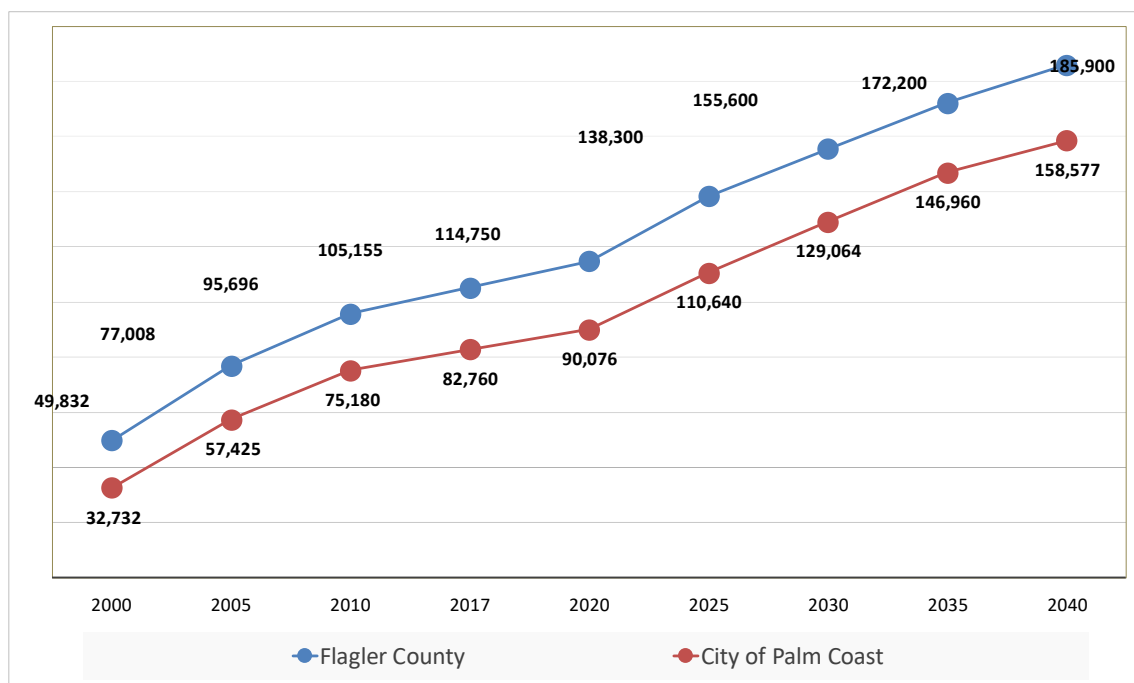
	2017	2020*	2025**	2030**	2035**	2040**
County Population Projection*	105,155	114,750	138,300	155,600	172,200	185,900
City Population Projection***	82,760	90,076	110,640	129,064	146,960	158,577
City Growth Rate	---	8.84%	22.83%	16.65%	13.87%	7.90%

*2020 Flagler County Population Projection is Average of Low and Medium BEBR Projections (Volume 49, Bulletin 174, January 2016) adjusted to mid-year

**2025-2040 Flagler County Population Projection is Medium BEBR Projections (Volume 49, Bulletin 174, January 2016) adjusted to mid-year

*** Assumes % of total Flagler County Population Projections

FIGURE 1.4 — POPULATION ESTIMATES/PROJECTIONS CHART



SECTION 2: RESIDENTIAL DEVELOPMENT

CONSTRUCTION COMPLETED

The Building Division of the Community Development Department issues and tracks Certificates of Occupancy, or “COs” for residential construction projects. COs indicate that a residential construction project has been completed and is ready for occupancy.

During the past year a total of 571 dwelling units were issued a CO, this total is a 37% increase from 2016. This included an increase in the number of attached single family units.

FIGURE 2.1 — RESIDENTIAL CONSTRUCTION COMPLETED TABLE (2013–2017)

	2013	2014	2015	2016	2017
Single-Family Detached Dwelling Units	193	320	345	356	555
Single-Family Attached Dwelling Units (Townhome/Duplex)	0	2	12	6	16
Multi-Family Dwelling Units	0	96	61	0	0
Total Dwelling Units	193	418	418	362	571

FIGURE 2.2 — RESIDENTIAL CONSTRUCTION COMPLETED CHART (2013–2017)

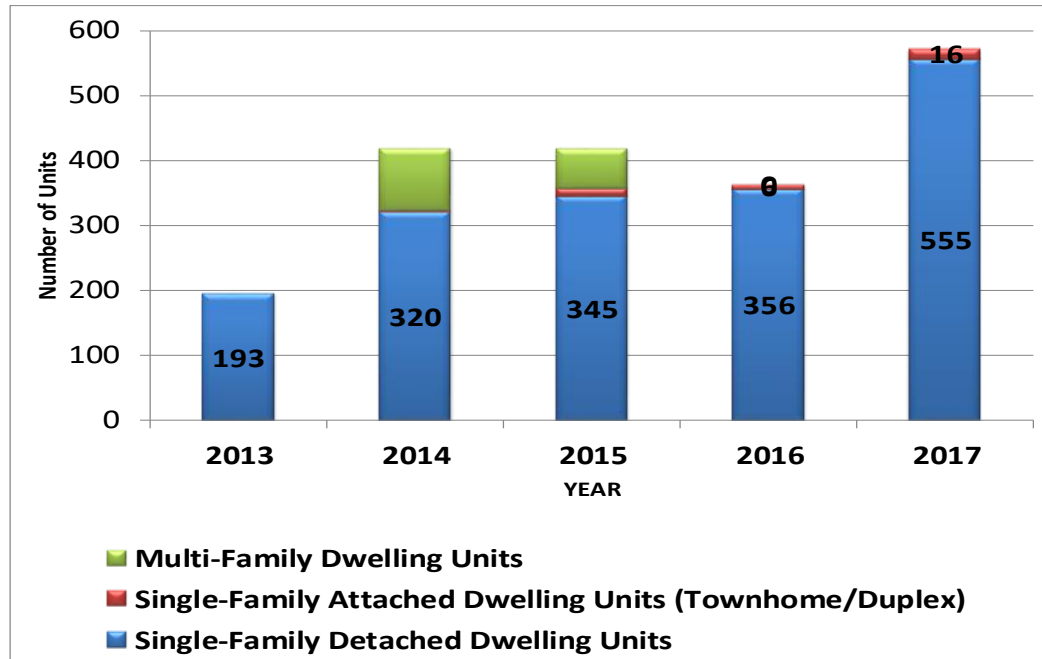
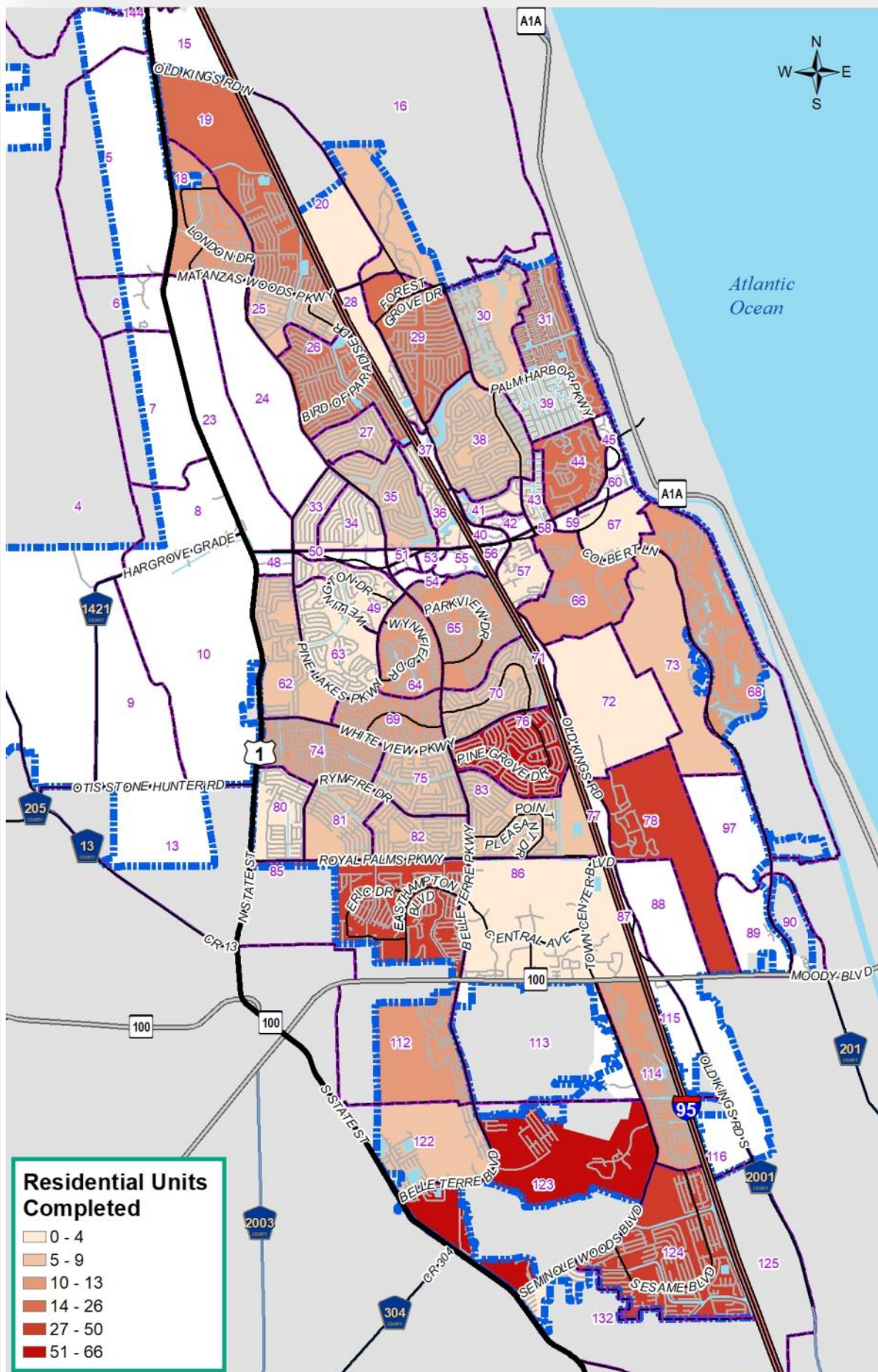


FIGURE 2.3 — RESIDENTIAL CONSTRUCTION COMPLETED MAP (2017)



BUILDING PERMITS ISSUED

The Building Division of the Community Development Department issues and tracks building permits for residential construction projects. Building permits indicate that a residential construction project is under construction and may be completed in the near future (0-3 years).

During the past year a total of 630 single-family detached dwelling units and 64 single-family attached dwelling units were issued a building permit. Overall, the number of permits issued increased by 21% from 2016.

FIGURE 2.4 — RESIDENTIAL BUILDING PERMITS ISSUED TABLE (2013–2017)

	2013	2014	2015	2016	2017
Single-Family Detached Dwelling Units	263	339	355	538	630
Single-Family Attached Dwelling Units (Townhomes/Duplex)	2	12	0	12	64
Multi-Family Dwelling Units	116	61	24	0	0
Total Dwelling Units	381	412	379	550	694

FIGURE 2.5 — RESIDENTIAL BUILDING PERMITS ISSUED TABLE (2013–2017)

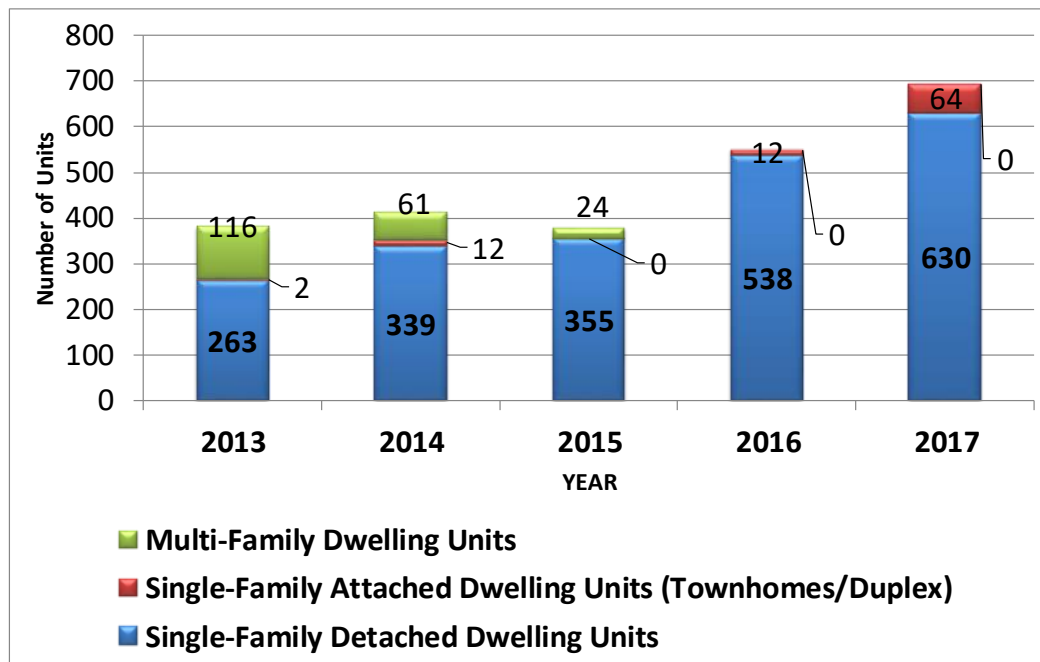
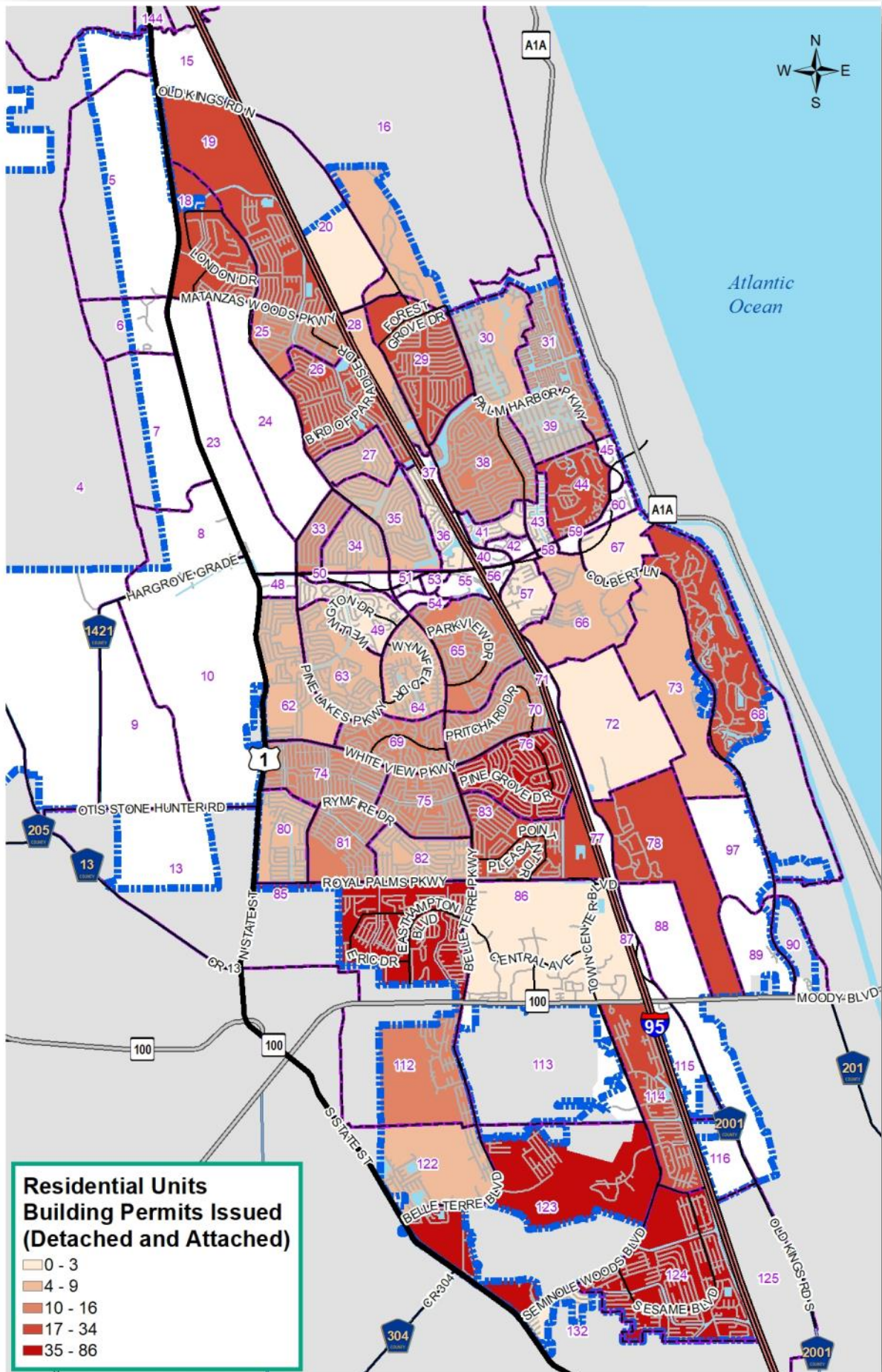


FIGURE 2.6 — RESIDENTIAL BUILDING PERMITS ISSUED MAP (2017)



DEVELOPMENT APPROVED

The Planning Division of the Community Development Department issues development orders for residential projects. Development orders allow an applicant to apply for a building permit to construct the residential project and may predict future growth in the short term (1–5 Years), depending on a variety of factors.

In 2017, the following Plat and Development Orders were Approved for residential development.

	TAZ	# of Units	Description
Grand landings Phase 3A	123	41	Final Plat
Summary of Residential Units Approved in 2017	41 dwelling units		

SECTION 2

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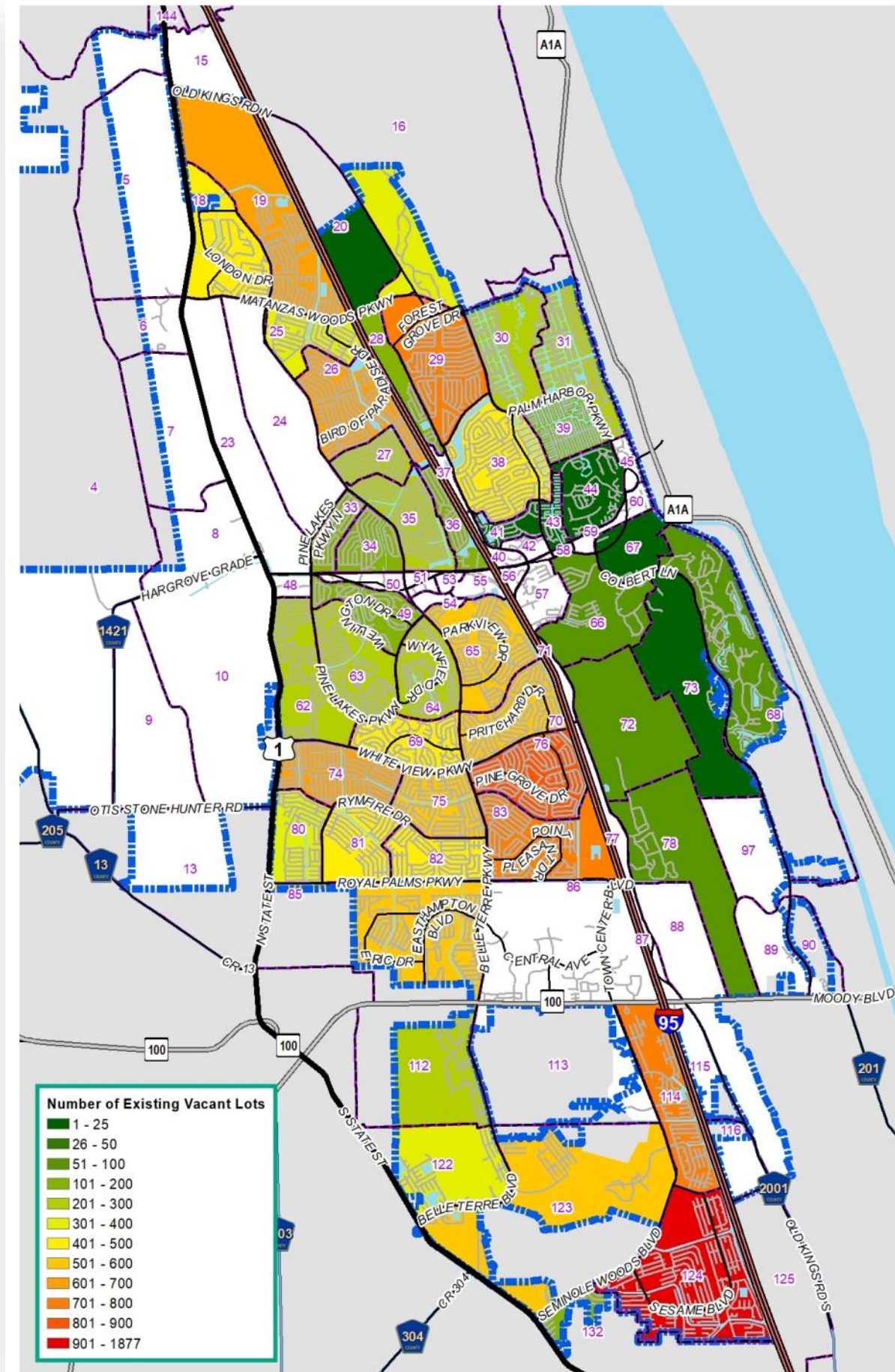
EXISTING VACANT LOTS

The City maintains a database of existing vacant lots for use by its various departments. At the end of 2017, the City contained approximately 16,586 vacant platted lots. The number of existing vacant lots represents future potential growth in the City over an extended period, possibly up to 20 years.

FIGURE 2.9 — EXISTING VACANT RESIDENTIAL LOTS BY TAZ TABLE (2017)

TAZ	Total Lots	Occupied Lots	Vacant Lots	Percentage Vacant
16	346	41	305	88.15%
18	1,097	662	435	39.65%
19	1,415	789	626	44.24%
20	22	2	20	90.91%
25	865	553	312	36.07%
26	2,043	1,372	671	32.84%
27	778	569	209	26.86%
28	241	119	122	50.62%
29	1,885	1,176	709	37.61%
30	1,041	815	226	21.71%
31	1,102	825	277	25.14%
33	604	451	153	25.33%
34	805	609	196	24.35%
35	1,308	1,064	244	18.65%
36	470	308	162	34.47%
38	2,352	1,874	478	20.32%
39	916	784	132	14.41%
41	285	280	5	1.75%
43	232	209	23	9.91%
44	418	412	6	1.44%
49	859	703	156	18.16%
57	220	220	0	0.00%
62	1,189	928	261	21.95%
63	1,501	1,299	202	13.46%
64	1,184	974	210	17.74%
65	1,709	1,178	531	31.07%
66	583	525	58	9.95%
67	32	31	1	3.13%
68	1,443	1,358	85	5.89%
69	1,298	854	444	34.21%
70	1,554	966	588	37.84%
72	75	0	75	100.00%
73	186	162	24	12.90%
74	1,715	1,110	605	35.28%
75	1,453	930	523	35.99%
76	2,025	1,168	857	42.32%
78	349	280	69	19.77%
80	894	546	348	38.93%
81	1,125	703	422	37.51%
82	1,245	791	454	36.47%
83	1,761	965	796	45.20%
85	2,153	1556	597	27.73%
86		0		
112	732	442	290	39.62%
114	1,309	532	777	59.36%
122	742	425	317	42.72%
123	1,139	574	565	49.60%
124	3,174	1,297	1877	59.14%
132	323	180	143	44.27%
TOTAL	50,197	33,611	16,586	33.04%

FIGURE 2.10 — EXISTING VACANT RESIDENTIAL LOTS MAP (2017)



SECTION 3: NON-RESIDENTIAL DEVELOPMENT

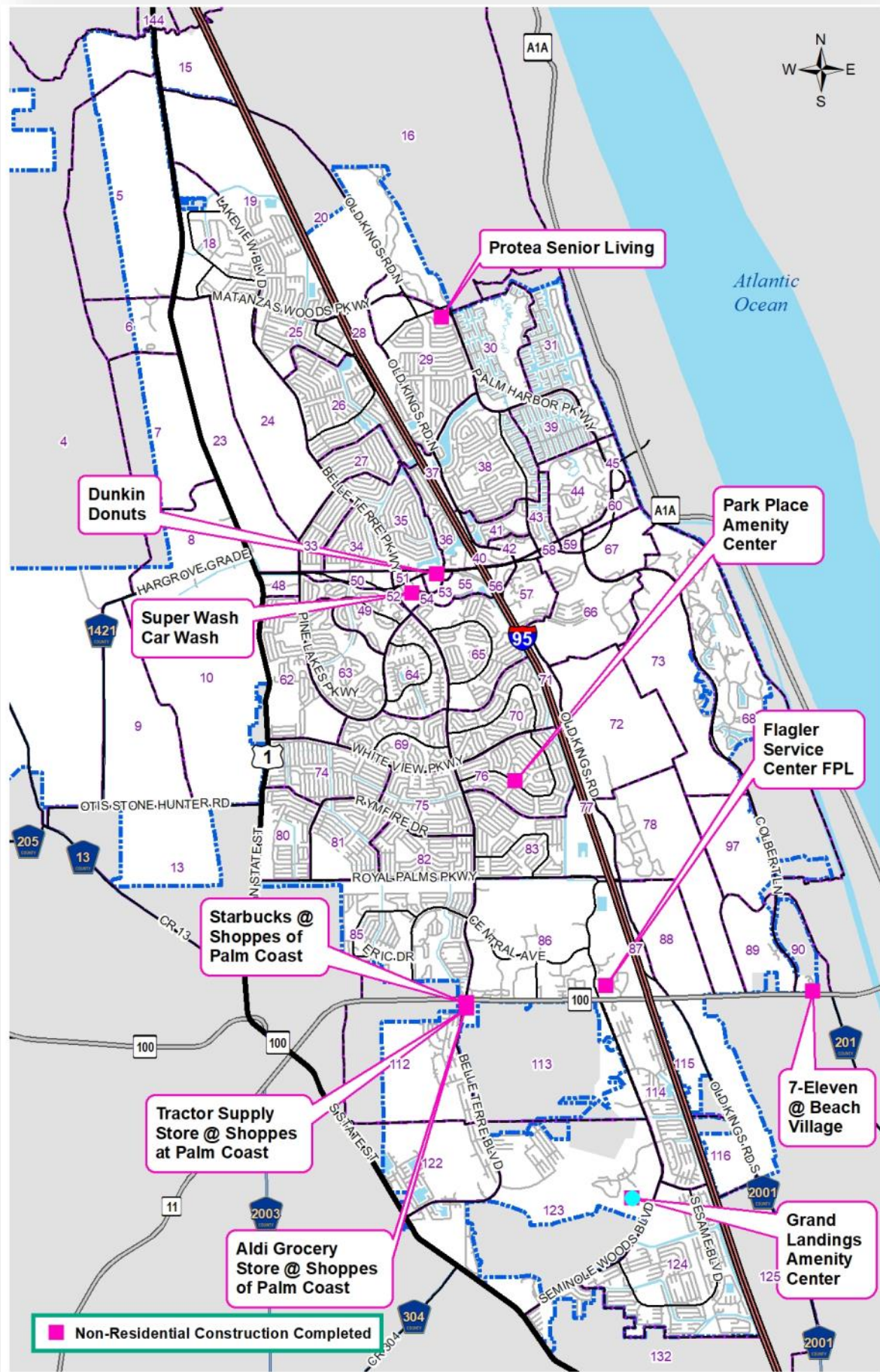
CONSTRUCTION COMPLETED

The Building Division of the Community Development Department issues and tracks Certificates of Occupancy, or “COs” for non-residential construction projects. COs indicate that a non-residential construction project has been completed and is ready for occupancy. During the past year, COs were issued for projects that included a total of 150,657 square feet of non-residential space. The total for 2017 is an increase from the previous year’s total of 84,716 square feet. This year’s non-residential projects is highlighted by a 67,432 sq. ft./100 bed assisted living facility in addition to new retail space for Tractor Supply Store and Aldi.

FIGURE 3.1 — NON-RESIDENTIAL CONSTRUCTION COMPLETED TABLE (2017)

	TAZ	Sq. Ft.	Description
Tractor Supply Store @ Shoppes at Palm Coast	86	18,800	Retail
Super Wash Car Wash	54	8,327	Carwash
Grand Landings Amenity Center	123	2,352	Amenity Center
Park Place Amenity Center	76	1,527	Amenity Center
Flagler Service Center FPL	86	25,436	Operations center
Aldi Grocery Store @ Shoppes of Palm Coast	86	17,849	Retail Building
Starbucks @ Shoppes of Palm Coast	86	2,200	Food/Drinking Establishment
Protea Senior Living	29	67,432	ALF/100 Bed
Dunkin Donuts	53	3,668	Reconstruction of building
7-Eleven @ Beach Village	90	3,066	Convenience store
Summary of Non-Residential construction completed in 2017		150,657	Sq. ft. of non-residential

FIGURE 3.2 — NON-RESIDENTIAL CONSTRUCTION COMPLETED (2017)



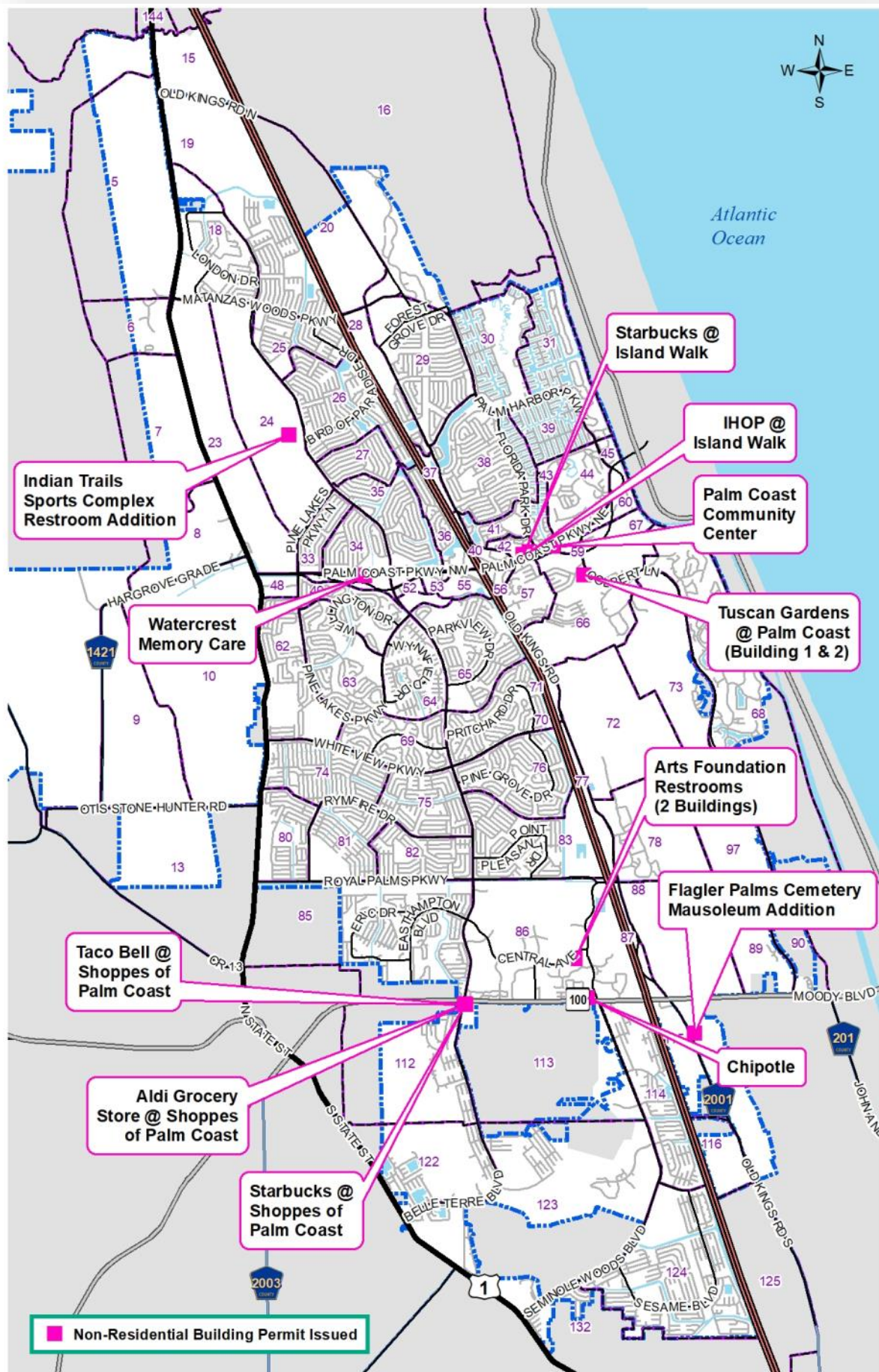
BUILDING PERMITS ISSUED

The Building Division of the Community Development Department issues and tracks building permits for non-residential construction projects. Building permits indicate that a non-residential construction project is under construction and may be completed in the near future (0-3 years). During the past year, building permits were issued for projects that included a total of 241,049 square feet of non-residential space, this amount is an increase over last year's total (2016) of 205,385 .

FIGURE 3.3 — NON-RESIDENTIAL BUILDING PERMITS ISSUED TABLE (2017)

	TAZ	Sq. Ft.	Description
Aldi Grocery Store @ Shoppes of Palm Coast	86	17,849	Retail Building
Starbucks @ Island Walk	42	2,064	Food/Drinking Establishment
Starbucks @ Shoppes of Palm Coast	86	2,200	Food/Drinking Establishment
Tuscan Gardens @ Palm Coast (Building 1 & 2)	66	135,883	Assisted Living Facility
Taco Bell @ Shoppes of Palm Coast	86	1,961	Food/Drinking Establishment
IHOP @ Island Walk	42	4,641	Food/Drinking Establishment
Flagler Palms Cemetery Mausoleum Addition	115	1,697	Cemetery
Watercrest Memory Care	50	45,952	Memory care/64 units
Palm Coast Community Center	58	18,330	Community Center
Chipotle	86	5,896	Food/Drinking Establishment
Arts Foundation Restrooms (2 Buildings)	86	3,104	Restroom Facilities
Indian Trails Sports Complex Restroom Addition	24	1,472	Restroom Facilities
Summary of Non-Residential Building Permits Issued in 2017		241,049	Sq. Ft. of non-residential

FIGURE 3.4 — NON-RESIDENTIAL BUILDING PERMITS ISSUED MAP (2017)



DEVELOPMENT APPROVED

The Planning Division of the Community Development Department issues development orders for non-residential projects. Development orders for non-residential projects allow an applicant to apply for a building permit to construct the residential project and may predict future growth in the short term (1–5 years), depending on a variety of factors. In 2017, development orders approved totaled 76,674 sq. ft. of non-residential use. This total is a decrease from the previous year's total of 547,501 square feet, which was highlighted by the Tuscan Gardens Assisted Living Facility (281,696 sq. ft.).

FIGURE 3.5 — NON-RESIDENTIAL DEVELOPMENT APPROVED TABLE (2017)

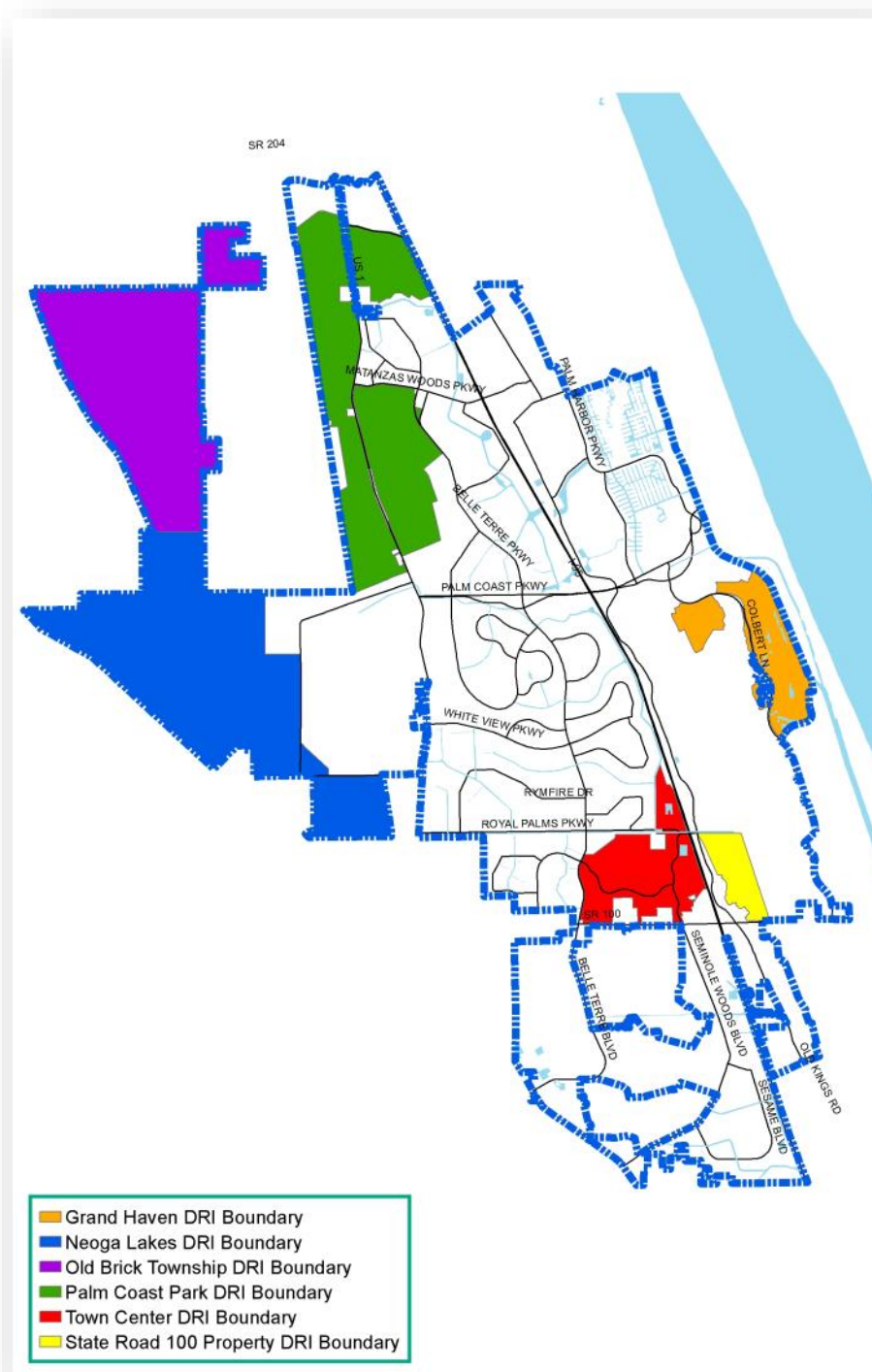
	TAZ	Sq. Ft.	Description
Starbucks @ Shoppes of Palm Coast	86	2,200	Food/Drinking Establishment
Palm Coast Community Center	58	18,330	Community Center
Chipotle	86	5,896	Food/Drinking Establishment
Flagler Palms Cemetery Mausoleum Addition	115	1,697	Cemetery
IHOP @ Island Walk	42	4,641	Food/Drinking Establishment
Arts Foundation Restrooms (2 Buildings)	86	3,104	Restroom Facilities
Indian Trails Sports Complex Restroom Addition	24	1,472	Restroom Facilities
Discount Tire	36	7,373	Tire Store
Taco Bell @ Shoppes of Palm Coast	86	1,961	Food/Drinking Establishment
Gioia Sales Warehouse Addition	48	30,000	Manufacturing Facility
Summary of Non-Residential Development Approved in 2017		76,674	Sq. Ft. of Non Residential

SECTION 3



Six (6) major developments, or Developments of Regional Impact (DRI), are approved within the City and will contribute to the overall growth of the City over the long term (up to 25 years). The Grand Haven DRI is substantially complete, with the exception of the remaining non-residential component. The other five (5) major approved developments could contribute 20,511 dwelling units and 10,626,000 square feet of non-residential space over the next 25 years. A location map of these major developments is shown below and the pages following provide a detailed status of the approved major developments.

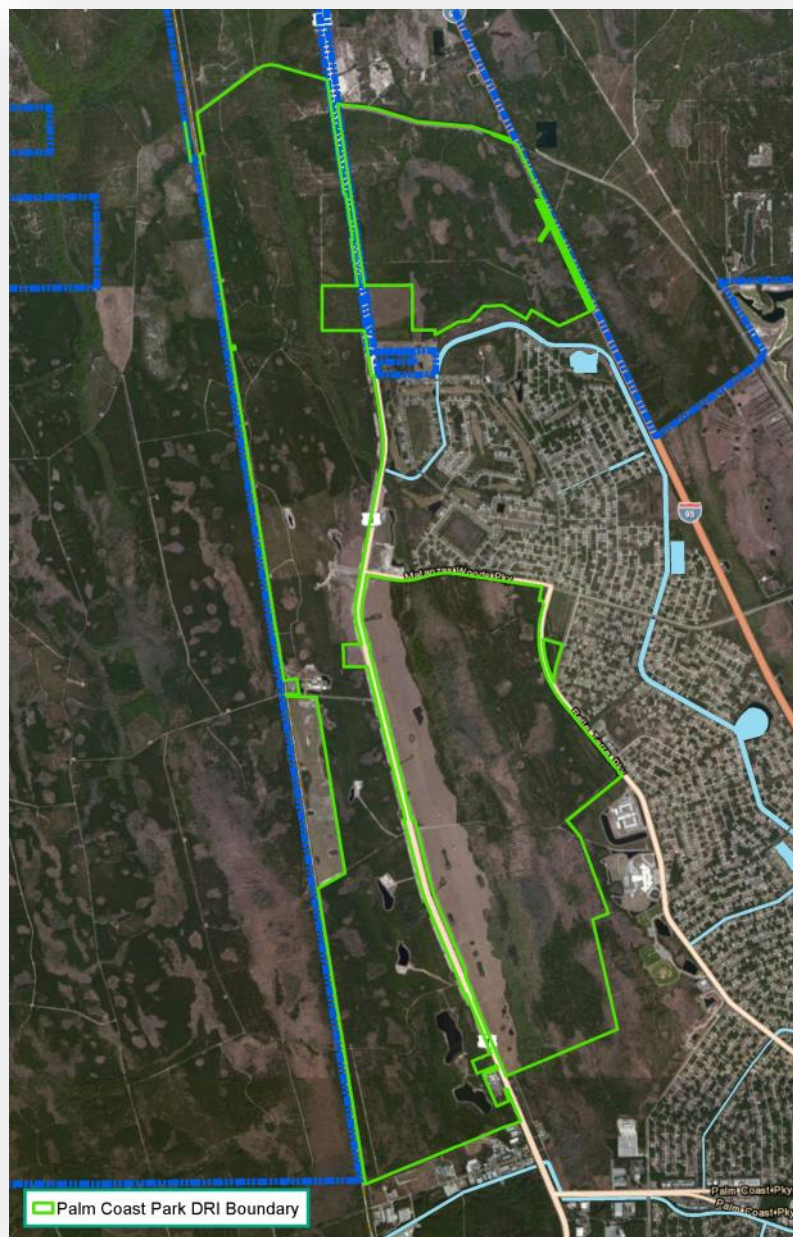
FIGURE 4.1 – MAJOR DEVELOPMENT LOCATION MAP



PALM COAST PARK DRI

The Palm Coast Park DRI was approved on December 7, 2004 and amended on October 11, 2012. The approved development plan includes 3,600 dwelling units and 2,480,000 square feet of non-residential space over three phases. The development order has a buildout date through Dec. 31, 2034.

FIGURE 4.2 — PALM COAST PARK DRI MAP AND TABLE

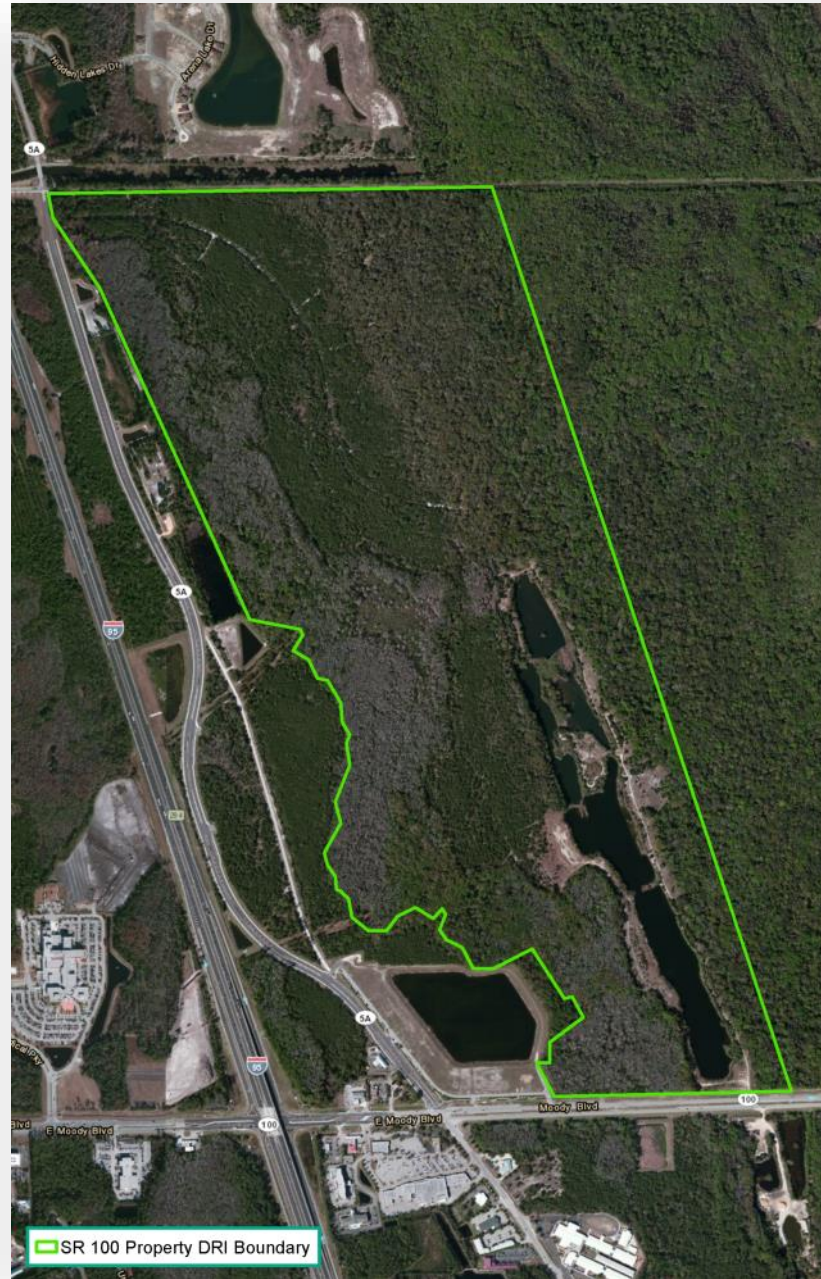


	ENTITLEMENT	DEVELOPMENT APPROVAL	BUILDING PERMITS ISSUED	CONSTRUCTION COMPLETED
RESIDENTIAL	3,600 du	-	-	-
OFFICE	800,000 sf	-	-	-
RETAIL COMMERCIAL	1,500,000 sf	-	-	-
INDUSTRIAL	80,000 sf	-	-	-
INSTITUTIONAL	100,000 sf	-	-	-

STATE ROAD 100 PROPERTY DRI

The State Road 100 Property DRI was approved on September 15, 2006 and the development plan includes 2,411 dwelling units, 80,000 square feet of non-residential space, and 150 hotel rooms over two phases over 9 years through 2015. No major projects have received development approval within the State Road 100 Property DRI through to the end of 2015.

FIGURE 4.3 — STATE ROAD 100 DRI MAP AND TABLE

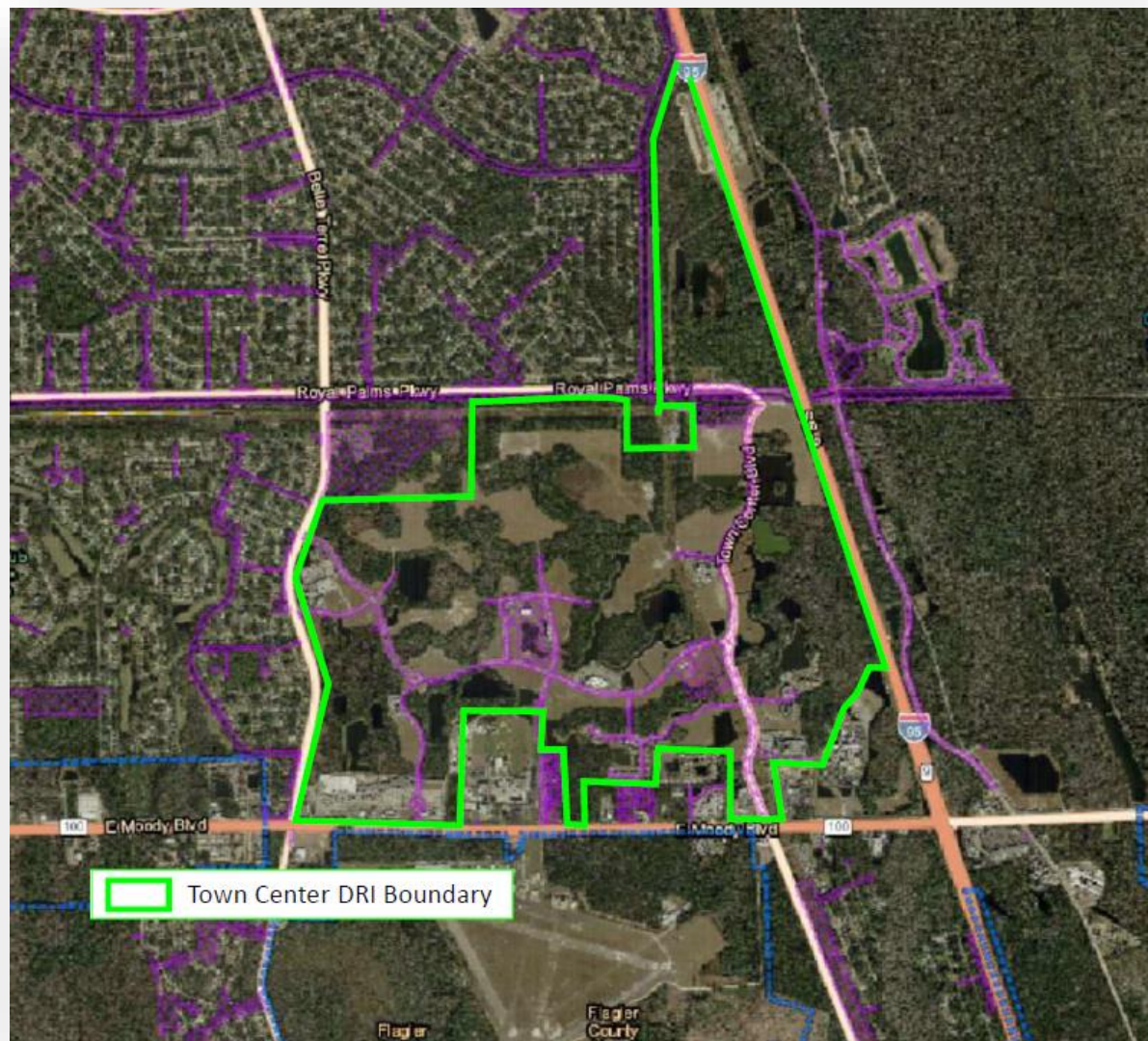


	DRI ENTITLEMENT	DEVELOPMENT APPROVAL	BUILDING PERMITS ISSUED	CONSTRUCTION COMPLETED
RESIDENTIAL (SF)	773 du	-	-	-
RESIDENTIAL (MF)	1,638 du	-	-	-
GENERAL RETAIL	50,000 sf	-	-	-
GENERAL OFFICE	30,000 sf	-	-	-
HOTEL	150 rooms	-	-	-

TOWN CENTER DRI

The Town Center DRI was approved on July 11, 2003 and the development plan includes 2,500 dwelling units, 4,425,000 square feet of non-residential space, over 3 phases over 17 years through 2020. A summary of development approvals is provided in the table below.

FIGURE 4.4 — TOWN CENTER DRI MAP AND TABLE

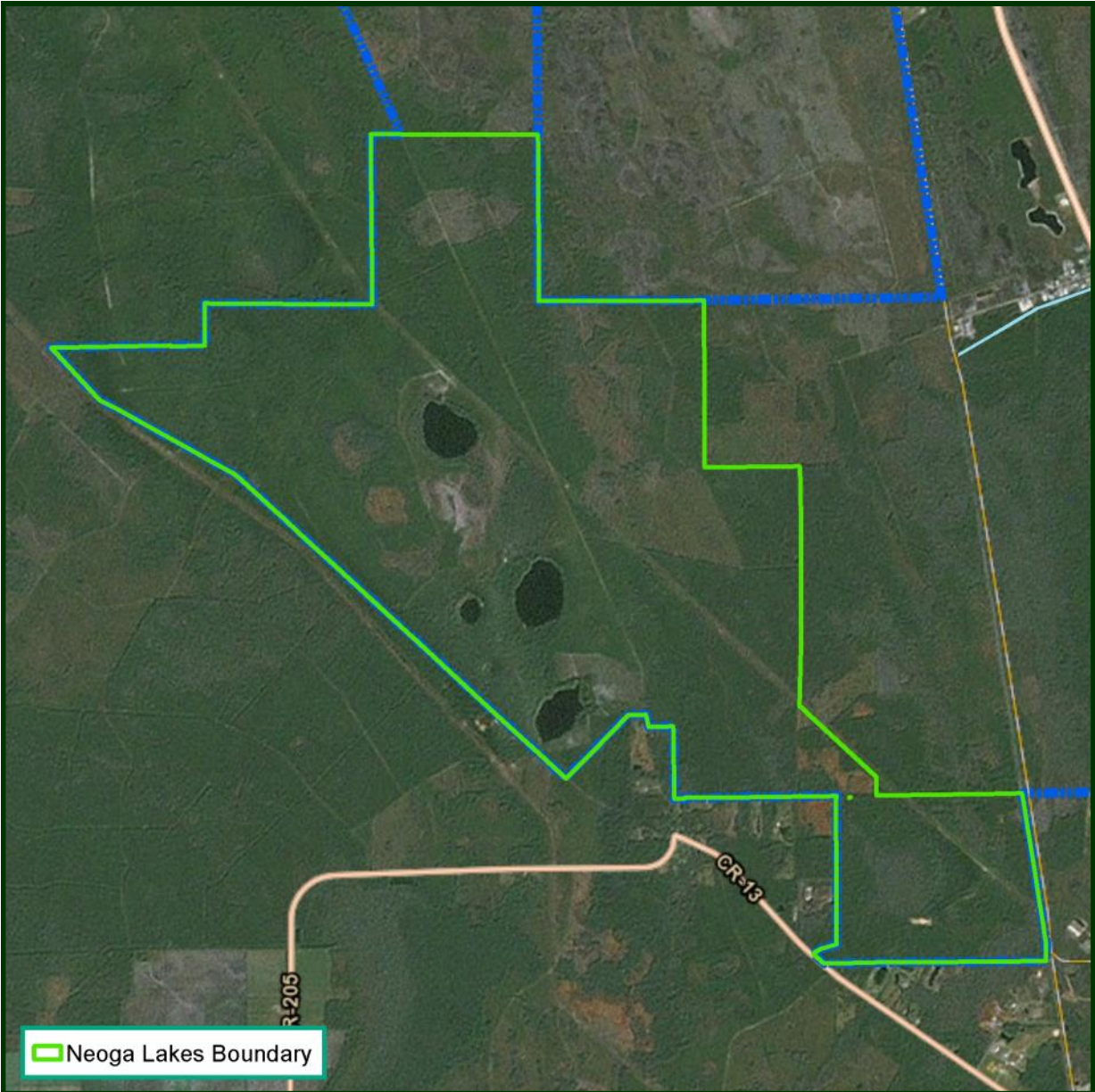


Land Use Category (Totals as of Dec. 31, 2017)	DRI Entitlement	Entitlement Approval	Construction Completed	Entitlement Remaining
Residential	2,500 du	454	219	2,046
Non-Residential	4,800,000 sf	1,760,277	733,612	3,039,723
Movie Theater	2,400 seats	2,400	2,400	
Lodging	480 rooms	407	327	73
Nursing Home	240 beds			240

NEOGA LAKES DRI

The Neoga Lakes DRI became effective after the settlement of the Department of Community Affairs’ appeal on July 27, 2011. The development plan includes 7,000 dwelling units, 2,491,000 square feet of non-residential space (including sites for a school and a wastewater treatment plant), recreation areas, open space and conservation areas. The project has three phases through November 2030.

FIGURE 4.5 — NEOGA LAKES DRI MAP AND TABLE

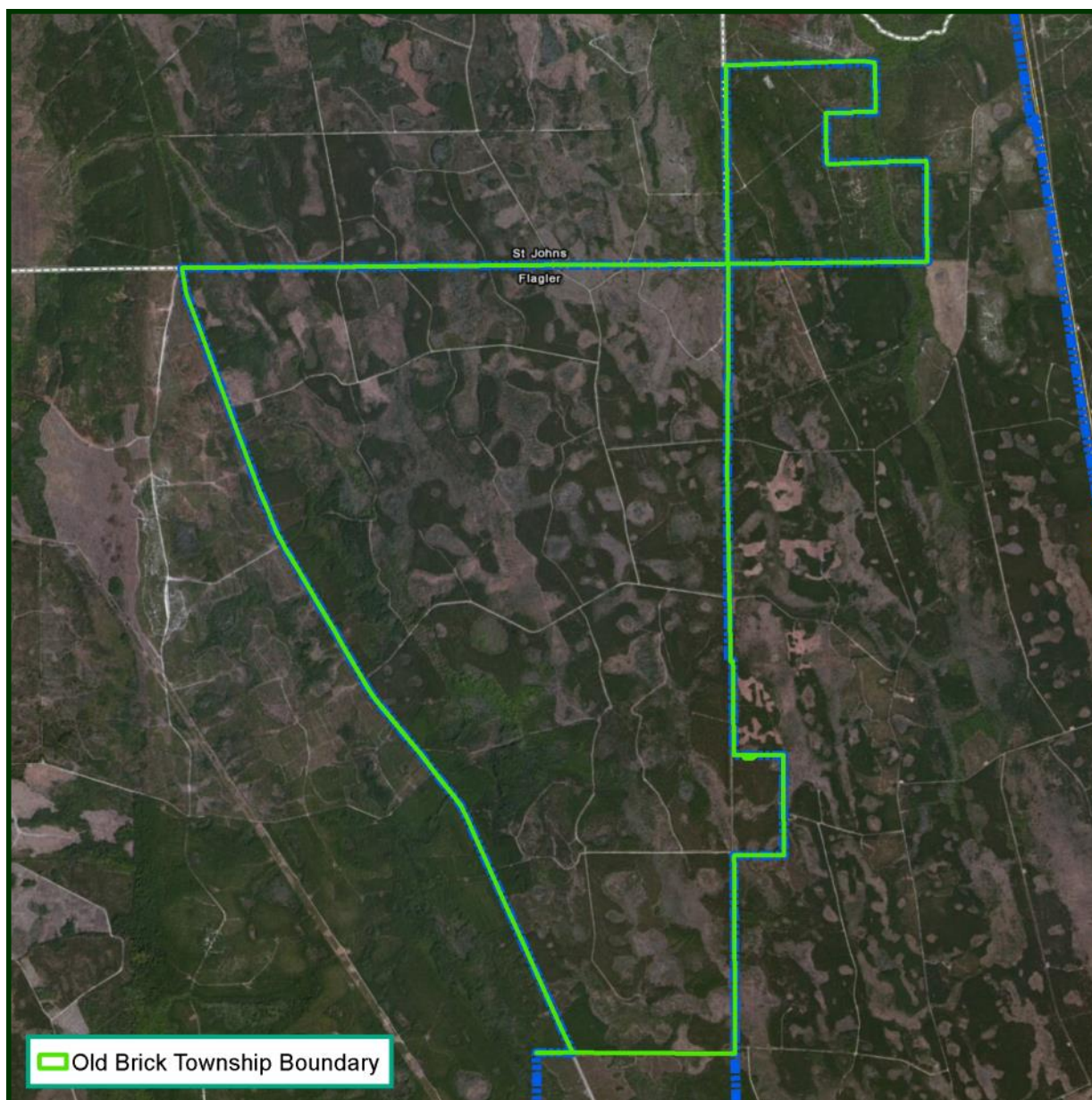


	DRI ENTITLEMENT	DEVELOPMENT APPROVAL	BUILDING PERMITS ISSUED	CONSTRUCTION COMPLETED
RESIDENTIAL	7,000 du	-	-	-
RETAIL USES	354,000 sf	-	-	-
OFFICE USES	45,000 sf	-	-	-
CIVIC USES	222,000 sf	-	-	-
EMPLOYMENT CENTER	1,870,000 sf	-	-	-

OLD BRICK TOWNSHIP DRI

The Old Brick Township DRI became effective after the settlement of the Department of Community Affairs' appeal on July 27, 2011. The development plan includes 5,000 dwelling units, 1,150,000 square feet of non-residential space, a school site, recreational amenities, and conservation areas. The project has three phases through August 2031.

FIGURE 4.6 — OLD BRICK TOWNSHIP DRI MAP AND TABLE



	DRI ENTITLEMENT	DEVELOPMENT APPROVAL	BUILDING PERMITS ISSUED	CONSTRUCTION COMPLETED
RESIDENTIAL	5,000 du	-	-	
COMMERCIAL	100,000 sf	-	-	-
OFFICE	50,000 sf	-	-	-
INDUSTRIAL	1,000,000 sf	-	-	-

SECTION 5: ADDITIONAL INFORMATION FOR THE SCHOOL DISTRICT

The *Interlocal Agreement for Public School Facility Planning* requires that the City provide information to the School District annually regarding Future Land Use Map amendments, conversion of residential units, and development approvals with school sites, in addition to the information regarding residential growth already contained in this report.

FUTURE LAND USE MAP AMENDMENTS

The City processed a FLUM amendment for a newly annexed area in 2017. The subject parcel is the site of development to be known as Marina Del Palma and previously received entitlements in Flagler County for 615 dwelling units.

CONVERSION OF RESIDENTIAL UNITS

The City did not review any conversions or redevelopment of residential units in 2017.

DEVELOPMENT APPROVALS WITH SCHOOL SITES

PALM COAST PARK DRI SCHOOL SITE

The Palm Coast Park Development of Regional Impact (DRI) includes a 25-acre school site.

JX STATE ROAD 100 DRI SCHOOL SITE

The JX State Road 100 DRI includes a 10-acre pad ready school site co-located with a City park site.

OLD BRICK TOWNSHIP DRI SCHOOL SITE

The Old Brick Township DRI includes up to 40-acre pad ready school site co-located with a City park site. The school site is generally identified as part of the proportionate share mitigation agreement between the developer, the City, and the School District.

NEOGA LAKES DRI SCHOOL SITE

The Neoga Lakes DRI includes a 115-acre school site co-located with a City park site. The school site is generally identified as part of the DRI- Development Order.





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