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1. Introduction

BACKGROUND AND SCOPE OF THE UPDATE

URBANOMICS, Inc., was retained by the St. Augustine & St. Johns County Chamber of Commerce to update aspects of the original Target Industry Study report prepared by the same firm for the Economic Development Council in 1998. This update addresses two key areas:

- ***Demographic and economic data***
- ***Business and industry targets***

The original report pre-dates the 2000 Census, requiring that population data and growth trend analyses be brought up to date. The same need for updating also applies to employment and industry data and trend analyses presented in the original report.

Business and industry targets recommended initially for the County also needed to be revisited in light of cyclical and potentially lasting changes in the national economy. Further, these targets needed to be revisited in light of recent restudy and refinement of business and industry targets by the Jacksonville Regional Chamber of Commerce, which drives economic development marketing for Northeast Florida. Several targets recommended originally for St. Johns County were among those defined and being pursued by the Jacksonville Chamber.

RATIONALE FOR ECONOMIC DEVELOPMENT

The rationale and motivation for promoting economic development in St. Johns County remain the same:

- ***Diversifying the Real Estate Tax Base.*** St. Johns County has the highest proportion of taxable residential real estate value and the lowest proportions of taxable commercial and industrial real estate values of all four counties in the Jacksonville Metropolitan Area (see Table 1). Commercial and industrial properties account for only 12.9 and 1.2 percent, respectively, of taxable real estate value in St. Johns County, versus 25.0 and 9.1 percent in Duval County. While St. Johns County generally has higher value residential real estate than other counties in the region, studies indicate that residential uses typically cost more to serve than the tax revenues they generate.

- ***Providing Job Opportunities Closer to Home.*** Nearly 40 percent of St. Jo 1 County residents with jobs work outside the County (see Table 2). According to the 2000 Census, 23,440 residents commuted to Jacksonville and other areas to work. Thirty-seven percent of workers commute 30 minutes or more to/from work. This level of commuting is an inconvenience, as well as a burden on the road system.

- ***Improving Quality of Jobs and Incomes.*** St. Johns County has higher proportions of lower wage support sector jobs than the metro area as a whole (see Table 3). The metro area has a higher proportion of employment in higher-wage driving sectors. These sectors, including manufacturing, wholesale trade, transportation, and financial services, serve regional and national markets and are largely independent of local needs in contrast to the construction, retail trade, services, and local government sectors, which exist mainly to serve local needs. St. Johns County has only 24 percent of its employment in the driving sectors, compared to 35 percent for the metro area as a whole and almost 39 percent in Duval County. The average St. Johns County wage in the support sectors ($23,814) was only 63 percent of the average for the driving sectors ($37,578) in year 2000.

Economic development is one of the six strategy areas defined in the St. Johns Vision, a citizens-driven strategic plan for St. Johns County. The other strategy areas are education, infrastructure, quality of life, government, and private sector leadership. Various economic development objectives and actions are outlined in the Vision, including the need *to think big* about St. Johns County's ability to attract high quality, high pay businesses which enhance the quality of life and are compatible with the environment. The Vision endorses the target industries recommended in the 1998 study, and adds Tourism and Visitors, Agriculture, and Education to the list of desirable targets.

TABLE 1. TAXABLE VALUE OF REAL ESTATE BY LAND USE, 2001

County	Percent of Total Assessed Value in County			
	Residential	**Commercial**	**Industrial**	**Other (1)**
Clay	77.1	16.3	2.4	4.2
Duval	63.7	25.0	9.1	2.2
Nassau	78.5	13.4	2.9	5.2
ST. JOHNS	***82.0***	***12.9***	***1.2***	***3.9***

Note:
(1) Includes agricultural lands, utilities, mining, taxable institutional properties, etc.

Source: Florida Department of Revenue; and URBANOMICS, Inc.

TABLE 2. COMMUTING PATTERNS, 2000

County	Percent Commuting 30+ Minutes	Percent Working in Same County	Percent Working Outside County	Number Working County
Clay	55	39.6	60.4	40,955
Duval	35	93.3	6.6	24,739
Nassau	43	54.0	46.0	12,323
ST. JOHNS	***37***	***60.2***	***39.8***	***23,440***

Source: US Census, 2000; and URBANOMICS, Inc.

TABLE 3. EMPLOYMENT MIX AND WAGE COMPARISONS, 2000

Employment Sector	Distribution of Covered Non-Farm Wage and Salary Employment (%)		St. Johns Co. Avg. Wages as a Percent of Metro Area
	Metro Area	*ST. JOHNS CO.*	
Driving Sectors			
Manufacturing	7.3	***9.8***	86.1
Transport., Communic., & Utilities	6.6	***1.9***	93.2
Wholesale Trade	5.7	***3.9***	114.7
Finance, Insurance, & Real Estate	10.3	***3.8***	101.1
Federal Government	3.3	***1.2***	91.4
State Government	1.8	***3.5***	95.8
Total -- Driving Sectors	35.0	***24.1***	------
Supporting Sectors			
Agric. Svcs, Forestry, & Fisheries	1.1	***2.3***	89.1
Construction	5.7	***5.1***	82.4
Retail Trade	19.5	***25.4***	88.1
Services	31.5	***31.9***	97.2
Local Government	7.0	***10.7***	83.2
Total -- Supporting Sectors	64.8	***75.4***	------
Average Wages			
Driving Sectors	$40,602	***$37,578***	92.6
Support Sectors	$26,558	***$23,814***	89.7

Note: Percentages may not add to 100.0 due to rounding and exclusion of mining and unclassified activities.

Source: Florida Agency for Workforce Innovation (ES 202 data) ; and URBANOMICS, Inc.

2. Population and Labor Force

POPULATION GROWTH TRENDS

Population and Households

According to annual population estimates made by the University of Florida's Bureau of Economic and Business Research (BEBR), metro area population growth accelerated in the second half of the decade, increasing from an average of 16,000 per year from 1990 to 1995 to nearly 23,000 annually from 1995 to 2000. This increase in population growth parallels increased job growth during the decade. Whereas average annual population growth increased by 43 percent in 1995-2000 over 1990-1995, based on BEBR estimates for 1995, average annual job growth increased by 45 percent for the same periods.

Population growth is also continuing to disperse from Jacksonville (Duval County) to the three other counties -- Clay, Nassau, and St. Johns. Duval accounted for 74.2 percent of the metro population in 1990, but only 70.8 percent in year 2000. Meanwhile, St. Johns County increased its share of the metro population from 9.2 percent to 11.2 percent. More to the point, the St. Johns County share of metro area population growth increased from 18.0 percent from 1990 to 1995 to 21.9 percent from 1995 to 2000. This dispersal pattern is likely to increase in the future as development land continues to diminish and prices escalate in Duval, particularly in the southeastern section of the county.

The number of households in the region has been growing at an average of 8,200 per year from 1990 to 2000, reaching a total of 425,000+ in year 2000 (see Table 4). The pace of household formation in the region, like population growth, increased from 6,800 per year from 1900 to 1995 to 9,600 from 1995 to 2000, a 41 percent increase. St. Johns County experienced a 72 percent gain in rate of household growth, increasing from an estimated average of 1,189 per year from 1990 to 1995 to an average of 2,048 from 1995 to 2000.

BEBR projections for metropolitan area counties show declining rates of growth from 2000 to 2010, compared to actual growth trends from 1990 to 2000 (Table 4). This reflects their conservative projection methodology which affects most areas of the state, rather than expectations that the metro area will indeed decline in rate of growth. Based on the pace of residential permits in 2001 and 2002 and a favorable long-range job growth outlook for the region, population and household growth in St. Johns County is on pace to exceed growth rates experienced from 1995 to 2000.

Housing Trends

Accelerating population and household growth in St. Johns County is clearly indicated by increases in the rate of new residential permits. The number of single family homes permitted almost tripled from 869 units in 1990 to 2,424 in 2002 (see Table 5). The County share of metro area activity increased from 14.5 percent in 1990 to 22.3 percent in 2002. The number of single family homes permitted in the County has increased steadily, exceeding 2,000 per year for the past three years (2000-2002), whereas the number of attached and multifamily units has fluctuated year-to-year.

Metro area activity has exceeded 10,000 units every year since 1999, owing to a strong economy in late 1990s and record low interest rates in recent years. In fact, permits have increased year-over-year since 2000, despite a downturn in the national economy and a decreased rate of regional job growth.

LABOR FORCE AND OCCUPATIONS

The St. Johns County civilian labor force increased from 41,085 in 1990 to 61,407 in 2000, a gain of 20,322, according to the US Census (see Table 6). Although the average annual growth rate across the decade was 2,032, new entrants accelerated during the decade in proportion to population growth. From 2000 to 2010, the labor force is projected to grow by an average of 2,500 new entrants or more per year, which would put the current labor force in the range of 67,000.

Economic development in St. Johns County is not dependent only on the local labor force. The County has access to a metro area labor force of over one half million persons, plus another 60,000 in adjacent Flagler and Putnam Counties.

Managerial and professional occupations are the strongest sectors in St. Johns County. The 2000 Census indicates that 36.7 percent of the employed labor force is in these categories, compared to 31.7 percent in Duval (see Table 7). St. Johns also has the highest proportions of sales and service workers (31.7 percent) because of its greater orientation to tourism and seasonal visitation. By comparison, only 26.2 percent of Duval County workers are in these two categories. Nassau County, which is also affected by tourism and seasonal visitation, has 27.3 percent of its employed workers in sales and service occupations.

On the other hand, proportions of workers in blue collar construction, production, and transportation trades are much lower in St. Johns than the other counties. These three categories account for only 17.3 percent of St. Johns County workers, versus 21.7 percent in Duval, 24.1 percent in Clay, and 30.6 percent in Nassau County.

Occupational characteristics in each of the counties reflect the location and types of economic activity in the region. Much of the industrial activity is located in northern and western sections of Duval County, which explains the higher proportions of blue collar workers in Clay, Duval, and Nassau Counties.

Conversely, much of the white collar office-related activity is in southeastern Duval County, which explains the comparatively high levels of managerial, professional and technical workers in St. Johns County. The higher proportion of managerial workers in St. Johns County is also explained by the generally upscale bedroom nature of the County. Similarly, a lower proportion of administrative support workers in the County, despite the proximity of office-related activities in southeastern Duval, is due to the higher cost of housing in St. Johns and an abundance of rental apartment communities in southeastern Duval.

TABLE 4. METROPOLITAN AREA POPULATION AND HOUSEHOLD TRENDS, 1990-2010

County	1990	1995	2000	2005	2010	Average Annual Growth			
						1990-1995	1995-2000	2000-2005	2005-2010
Clay									
Population	105,986	120,896	140,814	155,100	171,000	2,982	3,984	2,857	3,180
Households	36,663	42,495	50,243	55,526	61,371	1,166	1,548	1,057	1,169
Duval									
Population	672,971	718,355	778,879	832,500	882,900	9,077	12,105	10,724	10,080
Households	257,245	277,285	303,747	326,340	347,863	4,008	5,292	4,519	4,305
Nassau									
Population	43,941	49,127	57,663	64,900	72,000	1,037	1,707	1,447	1,420
Households	16,192	18,423	21,980	24,987	27,936	446	711	601	590
ST. JOHNS									
Population	***83,829***	***98,188***	***123,135***	***144,200***	***164,500***	***2,872***	***4,989***	***4,213***	***4,060***
Households	***33,426***	***39,373***	***49,614***	***58,257***	***66,623***	***1,189***	***2,048***	***1,729***	***1,673***
Metro Area									
Population	906,727	986,566	1,100,491	1,196,700	1,290,400	15,968	22,785	19,241	18,740
Households	343,526	377,576	425,584	465,380	503,793	6,810	9,602	7,906	7,737

Notes:
(1) 1995 population estimates from University of Florida, Bureau of Economic and Business Research (BEBR)
(2) 2005 and 2010 population projections from BEBR, 2/02 (medium projections)
(3) 1995, 2005, and 2010 household estimates by URBANOMICS based on 1990-2000 trends

Sources: US Census 2000; and URBANOMICS, Inc.

TABLE 5. RESIDENTIAL DEVELOPMENT TRENDS IN ST. JOHNS COUNTY, 1990-2002

Year	*ST. JOHNS COUNTY*		Metro Area		St. Johns Share (%)	
	SF Units	*MF Units*	SF Units	MF Units	SF Units	MF Units
1990	***869***	***299***	5,981	2,177	14.5	13.7
1991	***862***	***292***	5,905	1,462	14.6	20.0
1992	***1,119***	***33***	6,735	545	16.6	6.1
1993	***1,272***	***146***	7,017	491	18.1	29.7
1994	***1,389***	***193***	7,176	1,384	19.4	13.9
1995	***1,414***	***569***	6,468	2,122	21.9	26.8
1996	***1,614***	***211***	7,459	3,831	21.6	5.5
1997	***1,657***	***273***	6,966	1,596	23.8	17.1
1998	***1,764***	***169***	7,644	1,809	23.1	9.3
1999	***1,918***	***1,102***	8,044	3,288	23.8	33.5
2000	***2,085***	***450***	7,817	2,650	26.7	17.0
2001	***2,129***	***337***	9,600	3,055	22.9	11.0
2002	***2,424***	***594***	10,867	3,354	22.3	17.7
Averages						
1990-94	***1,102***	***193***	6,563	1,212	16.8	15.9
1995-99	***1,673***	***465***	7,316	2,529	22.9	18.4
2000-02	***2,213***	***460***	9,428	3,020	23.5	15.2

Notes:
(1) Metro Area includes Clay, Duval, Nassau, and St. Johns Counties
(2) Abbreviations: SF - single family detached homes; MF - attached and multifamily units

Source: University of Florida, Bureau of Economic and Business Research; and URBANOMICS, Inc.

TABLE 6. METRO AREA LABOR FORCE CHARACTERISTICS, 2000

County	Civilian Labor Force		Growth, 1990-2000	Employed 2000	Percent Unemployed
	1990	2000			
Clay	51,047	69,495	18,448	66,268	4.6
Duval	333,077	386,241	53,164	367,065	5.0
Nassau	21,457	28,476	7,019	27,113	4.8
ST. JOHNS	***41,085***	***61,407***	***20,322***	***59,394***	***3.3***
Metro Area	446,666	545,619	98,953	519,840	4.7

Source: US Census, 2000; and URBANOMICS, Inc.

TABLE 7. OCCUPATIONAL PROFILES OF METRO AREA COUNTIES, 2000

Occupation	Percentage of Employed Labor Force			
	Clay	Duval	Nassau	*ST. JOHNS*
Managemt, Business, and Finan.	13.4	13.7	11.7	***17.6***
--- Management	9.2	8.4	8.1	***12.8***
--- Business & Financial Operations	4.2	5.3	3.6	***4.8***
Professional and Technical	17.6	18.0	15.2	***19.1***
--- Computer & Mathematics	2.1	2.6	1.6	***2.3***
--- Architecture, Engineering & Rel.	1.9	1.6	1.8	***1.9***
--- Education and Training	5.0	4.6	4.5	***5.1***
--- Health Care	5.3	4.5	3.3	***5.2***
Administrative Support	17.7	20.1	14.2	***13.5***
Sales	12.7	12.1	12.7	***15.5***
Service	14.0	14.1	14.6	***16.2***
--- Food Preparation	4.4	4.7	5.4	***6.6***
Construction and Maintenance	12.8	9.6	14.1	***8.9***
--- Installation, Maint. & Repair	6.3	4.1	5.6	***3.2***
Production	4.6	5.3	8.4	***4.3***
Transportation & Matls Movemt	6.7	6.8	8.1	***4.1***
--- Motor Vehicle Operations	3.3	3.2	4.1	***2.0***
--- Materials Moving	2.2	2.7	2.6	***1.3***
Farming, Forestry & Fishing	0.5	0.3	0.8	***0.8***

Note: Percentages may not add to 100.0 due to rounding

Source: US Census, 2000; and URBANOMICS, Inc.

3. Employment and Earnings

METROPOLITAN AREA EMPLOYMENT GROWTH TRENDS

The number of non-farm wage and salary jobs in the four-county Jacksonville Metropolitan Area (Clay, Duval, Nassau, and St. Johns) increased from approximately 413,000 in 1990 to 530,000 in 2000, averaging nearly 11,700 new jobs per year (see Table 8). In the first half of the decade, job growth averaged approximately 9,500 per year. This average increased to 13,850 in the last half of the 1990s. A national economic recession was a significant factor in early 1990s versus the prosperous late 1990s.

Directly comparable data for 2001 and 2002 is not available. The Florida Agency for Workforce Innovation changed its employer classification system in 2001 from the SIC system (Standard Industrial Classification) to the NAICS (North America Industry Classification System) format, making it difficult to re-aggregate employment data into comparable pre-2001 categories.

Year-over-year job growth has fluctuated widely since 1990. Losses of 2,800 and 1,700 jobs were experienced in 1991 and 1992, during a period of national economic recession. The local economy bounced back in 1993 with a gain of approximately 16,300 jobs. Peak gains occurred in 1996 and 1997, when over 18,000 jobs were added each year. In the five year period from 1993 through 1997, nearly 85,000 jobs were added in the four-county area, averaging 16,900 per year. Job growth dipped to only 5,600 new jobs in 1998, but returned to over 13,000 in each of the next two years (1999 and 2000).

Hard national economic times caught up with the Jacksonville area in 2001, when only an annual average of 2,630 jobs were added. Month-over-month gains occurred through May 2001, but four of the next seven months had losses compared to the same months in year 2000. December 2001 employment was down 7,900 from the year before. Month-over-month comparisons through June 2002 ranged from a loss of approximately 900 jobs in January to a loss of 9,100 jobs in June. The average monthly job loss through June 2002 over June 2001 is 5,800.

The long-term outlook for the metro area is for job growth to be in the range of 2.0 to 2.2 percent per year on average, or an average of 12,000-13,000 per year to year 2010. The largest share of growth will continue to occur in southeastern Duval County, with gradually increasing spillover into northern St. Johns County. In the short term, the job growth outlook is less optimistic, with an actual loss anticipated for the full year 2002 and only a modest gain projected for 2003.

Of the approximately 117,000 new jobs during the decade, nearly 62,000 (53 percent) occurred in the services sector. The services sector is a broad category which includes hotels and entertainment-related services, health and medical services, privately-operated social and educational services, auto repair, maintenance and security services, computer services, and temporary staffing firms, among others. Interestingly, employment agencies and temporary staffing firms accounted for 30 percent of the growth in the services sector during the 1990s. Corporate downsizing in the early 1990s provided the impetus to this growing industry, which may get another boost during the early years of the new decade. This services sector accounts for 31 percent of jobs in the four-county area, followed by retail trade (20 percent) and government (12 percent). Many types of services, plus retail trade and local government, are considered support sectors, in that they exist primarily to serve the needs of the local population and other businesses in the region. Low wages also characterize many service industries and the retail trade sector in general.

In contrast to the services and retail trade sectors, the manufacturing, transportation, wholesale trade, and finance/insurance sectors serve larger regional, national, and global markets. These are the driving force behind a local economy and tend to have the highest wages. The Federal government, including the military, is also an economic driver. These driving sectors, except Federal, have experienced job growth in recent years.

The manufacturing sector lost 800 jobs from 1990 to 1995, but grew by 3,500+ jobs from 1995 to 2000, for a net gain of approximately 2,750 during the decade. The distribution industries -- transportation and wholesale trade -- added 10,300 jobs from 1990 to 2000. This growth shows the strength of Jacksonville as a major goods distribution center. The finance/insurance/real estate sector added 12,000 jobs during the decade, rebounding nicely from industry consolidations and cutbacks in the early 1990s.

In 2000, 82 percent of metro area employment was in Duval County, including 95 percent of the financial services sector, 94 percent of the transportation sector, 92 percent of Federal jobs, and 91 percent of the wholesale trade sector. Over 80 percent of metro area jobs in construction, manufacturing, and services also are in Duval County, compared to only a 71 percent share of the metro area population. St. Johns County accounted for only 7.5 percent of metro area jobs in 2000, versus 11.2 percent of the metro area population.

New job growth is centered primarily in two areas of Jacksonville: the Southside for the office-oriented financial services sector, and the Northside for manufacturing and distribution.

ST. JOHNS COUNTY EMPLOYMENT BASE

Employment Growth Trends

The St. Johns County employment base increased from 26,755 wage and salary jobs in 1990 to 39,842 in 2000, a gain of 13,087 jobs over the decade (see Table 9). Nearly two thirds of this increase occurred from 1995 to 2000, generally paralleling the County's accelerating population growth trend.

The largest job sources in the County are the support sectors which primarily serve the needs of the local population. These include retail trade, services, and local government. The retail and services sectors are the most prominent in the County, accounting for 25 percent and 32 percent, respectively, of all wage and salary jobs in 2000, compared to 20 percent and 31 percent of all metro area jobs. Higher proportions in St. Johns County are attributable to its residential nature and impacts of tourism and seasonal visitation on the local economy. The retail and services segments are actually getting stronger, having accounted for 60 percent of job growth in the County during the decade, adding more than 7,800 new jobs. Local government is the next largest sector, accounting for 11 percent of wage and salary jobs in 2000, adding 1,473 jobs from 1990 to 2000.

The driving sectors -- manufacturing, transportation, wholesale trade, finance, and state and Federal government -- all grew in the 1990s, but by modest amounts. Collectively, these sectors account for 24 percent of wage and salary jobs in the County. The brightest spot is manufacturing, which gained 780 jobs from 1990 to 2000. Wholesale trade and the financial services sector followed with gain of 719 and 536 new jobs.

The County increased its share of metro area jobs from 6.5 percent in 1990 to 7.5 percent in 2000, but lags the region in key driving sectors, particularly transportation, financial services, and wholesale trade. In these sectors, the number of locally-available jobs in 2000 was only 2.1 percent of the metro total in transportation, 2.8 percent in financial services, and 5.2 percent in wholesale trade. Manufacturing, the bright spot, accounted for 10.0 percent of all metro area jobs in the sector in 2000. The number of local manufacturing jobs, however, has since declined, primarily as a result of cutbacks at Northrop-Grumman, the County's largest private employer.

Another view of the St. Johns County employment base is presented in Table 10, which relates jobs to population (i.e., number of jobs per 1,000 residents) and compares St. Johns County with Duval County, the four-county metro area, and State of Florida. St. Johns had 324 jobs per 1,000 residents in 2000, versus 557 in Duval County and 481 for the metro area as a whole. The data clearly indicates that Duval County is the economic center of Northeast Florida.

Job gaps between Duval and St. Johns Counties are substantial. Local deficiencies are particularly apparent in the driving transportation, wholesale trade, and financial services sectors, where Duval County has several times the relative concentrations of jobs.

Large and Representative Employers

St. Johns County has a wide range of significant and unique employers, ranging from Northrop-Grumman St. Augustine Corp., which builds, reworks, outfits, and repairs civilian and military aircraft, to the PGA Tour, which represents golf professionals and professional golf tournaments held throughout the US. The mix of employers also includes Tree of Life, Inc., the nation's leading distributor of natural and health foods, and the American Culinary Federation, which represents the nation's food preparation and service industry.

Large and unique employers in the County are listed in Table 11. The list includes 22 manufacturing establishments ranging in size from 20 to 1,250 employees, spanning several industries, including aircraft, specialty foods, industrial components, and plastics and paper products. Nine firms have 100 or more employees, including two with more than 500. The two largest -- Northrop-Grumman and Hydro Aluminum -- account for nearly 50 percent of all manufacturing jobs in the County. This fact alone makes it necessary for the County to attract other high-wage industries in order to lessen the potential economic impacts of layoffs by a large employer.

Table 11 also includes 13 non-manufacturing employers ranging in size from 20 to 2,500 employees. The list includes four health-related and educational institutions, three firms in the distribution industry, two national professional and business organizations, and two branches of county government.

WAGE AND SALARY EARNINGS

Average wages in St. Johns County were approximately 86 percent of those in the metro area in 2000 (see Table 12). Interestingly, the County led the metro area in average wages in wholesale trade and financial services, but was lower in all other sectors. The higher wage profile in the wholesale trade sector may be explained, in part, by the presence of locally-headquartered Tree of Life, Inc.

Higher wages in the financial sector may be due to the proportionally greater presence of securities dealers and financial advisors serving high income clients in St. Johns County as well as the impact of comparatively high priced real estate on the personal incomes of agents and brokers.

In manufacturing, average St. Johns County wages in 2000 were 86 percent of the metro average. However, County wages were slightly greater than metro averages in the transportation equipment and machinery industries (see Table 13). The transportation equipment industry accounted for 53 percent of local manufacturing employment in 2000, and is dominated by Northrop-Grumman. In contrast, the local machinery industry totaled less than 100 jobs.

Other sizeable manufacturing sectors in the County, for which data is available, are the primary metals industry, including Hydro Aluminum North America and Tensolite Co., and the printing and publishing industry, which includes the St. Augustine Record, Leonards Corp., and Vinyl Industrial Products. Average County wages were substantially lower than metro averages in these sectors. St. Johns County accounted for 46 percent of metro area jobs in the primary metals industry in 2000, but average wages were only 78 percent of the metro average. The County also had 11 percent of metro area jobs in the printing and publishing industry, but average wages were only 77 percent of the metro average.

Manufacturing was the third leading source of earned income in St. Johns County in 2000, behind the services and retail trade sectors. Local manufacturing jobs generated 12.1 percent of earned income in 2000 (see Table 14), which was second in the metro area to Nassau County with 19.2 percent of earned income from manufacturing. Only 9.1 percent of earned income in Duval County was from manufacturing. Earnings from the wholesale trade sector ranked fourth locally in importance, with 7.1 percent of job-related income in 2000. Only Duval County, with 8.2 percent of earnings from this sector, was higher in the region.

St. Johns County is highly dependent on the generally lower wage support sectors as sources of earned income. Fifty-nine percent of earned income in St. Johns in 2000 was generated by retail trade, services, and local government, compared to only 46 percent in Duval County and 48 percent for the metro area.

TABLE 8. METROPOLITAN AREA EMPLOYMENT TRENDS, 1990-2000

Employment Sector	Number of Non-Farm Wage & Salary Employees			Change in Employment	
	1990	1995	2000	1990-1995	1995-2000
Private					
Agriculture, Forestry & Fisheries	4,248	5,043	5,876	795	833
Construction	25,344	25,022	30,024	(322)	5,002
Manufacturing	36,149	35,342	38,897	(807)	3,555
Transportation, Communications & Utilities	26,027	29,619	34,911	3,592	5,292
Wholesale Trade	25,787	24,915	29,926	(872)	5,011
Retail Trade	83,496	91,761	103,310	8,265	11,549
Finance, Insurance & Real Estate	42,346	48,031	54,345	5,685	6,314
Services	104,903	134,963	166,694	30,060	31,731
Other, including Mining	745	1,895	1,299	NA	NA
Subtotal -- Private	349,045	396,591	465,282	47,546	68,691
Government					
Federal	18,851	17,654	17,723	(1,197)	69
State	8,344	9,108	9,423	764	315
Local	36,354	36,891	37,075	537	184
Subtotal -- Government	63,547	63,654	64,221	107	557
All Sectors	412,592	460,245	529,503	47,653	69,258
Annual Average				9,531	13,852

Notes:
(1) Annual average covered non-farm wage and salary employees
(2) Numbers in parentheses (000) indicate a loss
(3) Metropolitan Area includes Clay, Duval, Nassau, and St. Johns Counties
(4) NA - not applicable

Source: Florida Agency for Workforce Innovation (ES202 data); and URBANOMICS, Inc.

TABLE 9. ST. JOHNS COUNTY EMPLOYMENT TRENDS, 1990-2000

Employment Sector	Number of Non-Farm Wage & Salary Employees			Change in Employment	
	1990	1995	2000	1990-95	1995-00
Private					
Agricultural Services, Forestry & Fisheries	725	914	932	189	18
Construction	1,177	1,358	2,038	181	680
Manufacturing	3,117	3,006	3,897	(111)	891
Transportation, Communic. & Utilities	448	522	738	74	216
Wholesale Trade	848	1,271	1,567	423	296
Retail Trade	6,813	8,363	10,103	1,550	1,740
Finance, Insurance & Real Estate	996	1,160	1,532	164	372
Services	8,200	9,861	12,746	1,661	2,885
Other, including Mining	14	170	144	NA	NA
Subtotal -- Private	22,338	26,625	33,697	4,287	7,072
Government					
Federal	381	353	468	(28)	115
State	1,232	1,347	1,401	115	54
Local	2,804	3,454	4,277	650	823
Subtotal -- Government	4,417	5,154	6,146	737	992
All Sectors	26,755	31,779	39,842	5,024	8,063
Annual Average				1,005	1,613

Notes:
(1) Annual average covered non-farm wage and salary employees
(2) Numbers in parentheses (000) indicate a loss
(3) Metropolitan Area includes Clay, Duval, Nassau, and St. Johns Counties
(4) NA - not applicable

Source: Florida Agency for Workforce Innovation (ES202 data); and URBANOMICS, Inc.

TABLE 10. COMPARISONS OF NUMBER OF COVERED NON-FARM WAGE AND SALARY JOBS PER THOUSAND RESIDENTS, 2000

Employment Sector	State of Florida	Metro Area	Duval County	*ST. JOHNS COUNTY*
Private				
Agric. Services., Forestry & Fish.	9.8	5.3	4.3	***7.6***
Construction	24.4	27.3	31.0	***16.6***
Manufacturing	30.4	35.3	40.5	***31.7***
Transportat., Commun., & Utilities	22.0	31.7	41.9	***6.0***
Wholesale Trade	23.8	27.2	35.0	***12.7***
Retail Trade	86.2	93.9	100.1	***82.1***
Finance, Insurance, & Real Estate	27.3	49.3	66.0	***12.4***
Services	155.0	151.5	173.4	***103.5***
Subtotal -- Private	380.6	422.8	493.4	***273.7***
Government				
Federal	7.8	16.1	20.9	***3.8***
State	13.4	8.6	9.4	***11.4***
Local	39.9	33.7	33.0	***34.7***
Subtotal -- Government	61.1	58.4	63.3	***49.9***
TOTAL -- All Sectors	441.7	481.2	556.8	***323.6***

Notes:
(1) Metropolitan Area includes Clay, Duval, Nassau, and St. Johns Counties

Source: Florida Agency for Workforce Innovation (ES202 data); and URBANOMICS, Inc.

TABLE 11. REPRESENTATIVE EMPLOYERS IN ST. JOHNS COUNTY

Name	Product or Service	SIC Code	NAICS Code	No. Workers
Manufacturing				
Northrop-Grumman Corp.	Aircraft rework, repair & maint.	3721	33641	1,075
Hydro Aluminum Nth. Am.	Non-ferrous metal fabrication	3354	33131	542
Luhrs Corp.	Pleasure boat building & repair	3732	33661	350
Ideal Division, Stant Corp.	Auto parts (hose clamps, etc.)	3714	33632	224
Tensolite Co.	High-tech wire	3357	33131	220
Whetstone Candy Co.	Specialty food products	2066	31133	160
Dobbs Enterprises, Inc.	Menu design/manufacturing	3089	32612	120
St. Augustine Record	Newspaper publishing	2711	51111	100
Leonards Corp.	Book binding	2789	32312	100
Vinyl Industrial Products	Looseleaf binders	2782	32311	80
Dominex	Specialty food products	2038	31141	75
Riley Gear Corp.	Precision gears	3462	33211	48
Jen-Sar Produce, Inc.	Canned fruits and vegetables	2033	31142	40
Label Systems Intl	Paper label products	2671	32222	35
American Natural Snacks	Specialty food products	2064	31133	22
Bronz-Glow Technologies	Coatings	2851	32251	20
Conplex	Thermoplastics	3089	32612	20
Global Marine Systems	Vessel maintenance	3731	48839	20
Doyle Group	Publishing	2721	51112	20
Creative Images	Children's art	3999	33999	20
Schoenhut Piano Co.	Toy pianos	3944	33999	20
Security & Fire Electron.	Printed circuit boards	3672	33441	20
Non-Manufacturing				
St. Johns Co. School Dist.	Education	NA	NA	2,500
Flagler Hospital	Private health care facility	8062	62211	1,400
FL Sch. for Deaf & Blind	Education for handicapped	8322	62412	730

TABLE 11. REPRESENTATIVE EMPLOYERS IN ST. JOHNS COUNTY (continued)

Name	Product or Service	SIC Code	NAICS Code	No. Workers
***Non-Manufacturing** (continued)*				
St. Johns County	Local government	NA	NA	708
Ponte Vedra Inn & Club	Resort hotel	7011	72111	550
Sawgrass Marriott Resort	Resort hotel	7011	72111	480
PGA Tour	Professional golf events mgmt.	7941	71132	400
Tree of Life, Inc.	Health foods distributor	5149	42249	385
US Army National Guard	State HQ	9711	92811	355
Flagler College	4-year liberal arts college	8221	61131	200
FL East Coast RR	Rail freight transportation	4011	48211	171
Univ. of St. Augustine	Phys. & occupational therapy	8221	61131	58
ConAgra Foods, Inc.	Frozen food distributor	5142	42242	50
American Culinary Fed.	Food service organization	8621	81392	30
Lifeware Tek	Web site design for food ind.	7375	51419	20

Notes:
(1) SIC - Standard Industrial Classification
(2) NAICS - North American Industry Classification System
(3) NA - Not applicable

Source: Florida Chamber of Commerce, 2002 Directory of Florida Industries; St. Augustine & St. Johns County Chamber of Commerce; and URBANOMICS, Inc.

TABLE 12. EMPLOYMENT AND WAGE COMPARISONS FOR THE METRO AREA AND ST. JOHNS COUNTY, 2000

Employment Sector	Metro Area		*ST. JOHNS COUNTY*		Percent of Metro Area	
	Jobs (#)	Average Wages ($)	*Jobs (#)*	*Average Wages ($)*	Jobs	Average Wages
Private						
Agric, Forestry, & Fisheries	5,876	21,959	***932***	***19,568***	15.9	89.1
Construction	30,024	32,590	***2,038***	***26,868***	6.8	82.4
Manufacturing	38,897	40,817	***3,897***	***35,166***	10.0	86.2
Transportation, Comun,& Util	34,911	37,152	***738***	***34,642***	2.1	93.2
Wholesale Tr.	29,926	42,582	***1,567***	***48,824***	5.2	114.7
Retail Trade	103,310	17,563	***10,103***	***15,446***	9.8	88.1
Finance, Ins, & Real Estate	54,345	42,130	***1,532***	***42,589***	2.8	101.1
Services	166,694	29,544	***12,746***	***28,740***	7.6	97.2
Other	1,299	NA	***144***	***NA***	NA	NA
Subtotal - Priv	465,282	30,835	***33,697***	***26,823***	7.2	87.0
Government						
Federal	17,723	44,822	***468***	***40,977***	2.6	91.4
State	9,423	29,461	***1,401***	***28,213***	14.9	95.8
Local	37,075	34,038	***4,277***	***28,318***	11.5	83.2
Subtotal - Govt	64,221	NA	***6,146***	***NA***	9.6	NA
TOTALS	529,503	31,502	***39,842***	***27,198***	7.5	86.3

Notes:
(1) Annual average covered non-farm wage and salary employees
(2) Metropolitan Area includes Clay, Duval, Nassau, and St. Johns Counties
(3) NA - not applicable; not available

Source: Florida Agency for Workforce Innovation (ES202 data); and URBANOMICS, Inc.

TABLE 13. MANUFACTURING EMPLOYMENT AND WAGE COMPARISONS FOR THE JACKSONVILLE METRO AREA AND ST. JOHNS COUNTY, 2000

Employment Sector	**Metro Area**		***ST. JOHNS CO.***		**Percent of Metro**	
	No. Jobs	**Average Wages ($)**	***No. Jobs***	***Average Wages ($)***	**Jobs**	**Average Wages**
Food Products	4,827	40,753	***NA***	***NA***	---	---
Apparel	316	24,839	***18***	***17,413***	5.7	75.5
Lumber/Wood Prod.	1,222	36,326	***NA***	***NA***	---	---
Furniture/Fixtures	716	27,005	***NA***	***NA***	---	---
Paper/Paper Prod.	3,257	42,794	***NA***	***NA***	---	---
Printing/Publishing	3,792	33,307	***424***	***25,612***	11.1	76.9
Chemical/Rel. Prod.	1,931	53,567	***39***	***22,582***	2.0	42.2
Plastics/Rubber Prod.	1,005	34,178	***NA***	***NA***	---	---
Stone/Clay/Glass Prod.	2,518	36,213	***53***	***34,985***	2.1	96.6
Primary Metals	1,752	39,894	***805***	***31,264***	45.9	78.4
Fabricated Metal Prod.	3,646	30,999	***NA***	***NA***	---	---
Machinery	2,045	37,211	***94***	***37,712***	4.6	101.3
Elect. Equip/Electronics	870	48,601	***NA***	***NA***	---	---
Transportation Equip.	5,073	38,608	***2,046***	***41,699***	40.3	108.0
Instruments	3,257	63,843	***NA***	***NA***	---	---
Other	1,302	NA	***NA***	***NA***	---	---
TOTALS	38,896	40,817	***3,897***	***35,166***	10.0	86.2

Notes:
(1) Annual average covered non-farm wage and salary employees
(2) NA - not applicable; not available

Source: Florida Agency for Workforce Innovation (ES202 data); and URBANOMICS, Inc.

TABLE 14. EARNED INCOME BY EMPLOYMENT SECTOR, 2000

Industry	Percentage of Total Earnings by Area				
	Clay County	Duval County	Nassau County	*ST. JOHNS COUNTY*	Metro Area
Private					
Agric/Forestry/Fisheries	1.6	0.5	5.8	***1.7***	0.8
Construction	7.6	5.7	9.3	***5.1***	5.9
Manufacturing	7.0	9.1	19.2	***12.6***	9.5
Transport/Commun/Util	4.3	8.6	3.1	***2.4***	7.8
Wholesale Trade	2.9	8.2	2.2	***7.1***	7.6
Retail Trade	19.7	10.0	11.4	***14.4***	10.9
Finance/Insuran/Real Est	3.2	15.3	2.9	***6.0***	13.7
Services	33.3	29.3	19.0	***33.8***	29.5
Subtotal - Private	80.8	87.0	72.9	***83.4***	86.0
Government					
Federal	1.5	5.0	10.9	***1.8***	4.8
State	1.4	1.5	1.5	***3.6***	1.7
Local	16.4	6.5	14.6	***11.2***	7.6
Subtotal -Government	19.2	13.0	27.1	***16.6***	14.0

Notes:
(1) For covered non-farm wage and salary workers

Source: Florida Agency for Workforce Innovation (ES202 data); and URBANOMICS, Inc.

4. Office and Industrial Development Trends

GENERAL DEVELOPMENT TRENDS

St. Johns County

More than 1.7 million square feet of office and industrial space was added in the County from 1995 through 2000, based on analysis of new development in seven locations from records of the County Property Appraiser (see Table 15). These seven locations are:

I-95 Corridor

- CR210/I-95 area
- World Golf Village area
- SR16/I-95 area
- SR207/I-95 area

Other Locations

- SR312/Dobbs Road area
- US1 Corridor/Flagler Hospital area
- SRA1A Corridor/Ponte Vedra area

It should be noted that new office and industrial development has also occurred in other locations, particularly in the US1 corridor north of St. Augustine, but the seven locations listed above represent the bulk of activity in recent years. Ponte Vedra is the most active office market, having added an estimated 429,000 square feet since 1995. The World Golf Village area follows with 249,000 square feet of new space.

The leading industrial location in new space added is the SR207/I-95 area, with the expansion of the Tree of Life distribution center in 2001 (150,000sf) and addition of the ConAgra distribution center in 2002 (347,000sf). Most active locations in number of new buildings are CR210/I-95, which added 129,000 square feet, SR16/I-95, which added 185,000 square feet, and the SR312/Dobbs Rd. area, which added 134,000 square feet from 1995 to 2002.

New development in these seven locations has averaged approximately 220,000 square feet of space per year. The pace of activity has accelerated in the past three years to an average of 380,000 square feet per year from 2000 to 2002. Clearly, St. Johns County is showing signs of coming of age as a location for office and industrial development. While some of this relates to the needs of a growing local population, regional economic growth and spillover from southeastern Jacksonville is an emerging factor in the local economy.

Southeastern Jacksonville

Southeastern Jacksonville, defined as the area south of Beach Boulevard, averaged 1.3 million square feet of new office and industrial construction per year from 1990 to 2001, including an average of more than 1.5 million square feet per year from 1995 to 2001, according to City of Jacksonville building permit records.

The office market in southeastern Jacksonville has been increasingly active through the 1990s and into the new decade, having increased from an average of 564,000 square feet of new construction per year from 1990 to 1994 to 1,017,000 square feet per year since 1995. The local industrial market increased from an average of 331,000 new square feet per year from 1990 to 1994 to an average of 524,000 square feet per year since 1995.

With prospects for job growth continuing at or above levels experienced during the 1990s over the long term, southeastern Duval and northern St. Johns Counties are expected to attract an estimated 1.5-1.8 million square feet of new office and industrial space per year, on average, to 2010. As business parks and properties in southeastern Jacksonville build out and escalate in price, growth will spillover increasingly into northern St. Johns County.

MAJOR HIGHWAY PROJECTS AFFECTING FUTURE DEVELOPMENT

Several major road projects will have significant impacts on the type and timing of future economic development in St. Johns County. These improvements will affect adjacent areas and alter market dynamics by increasing regional access and shortening travel times for commuters and business operations. Improvements underway and planned include the following (***Note:*** estimated completion times are based primarily on information from the Jacksonville Transportation Authority and Florida Department of Transportation):

- ***I-95 Interchange/Old St. Augustine Road.*** Construction of a new interchange at this location began in 2002, with completion anticipated in 2004. This $21 million project is being constructed by Flagler Development, the real estate arm of the Florida East Coast Railroad, and developer of Flagler Center (formerly Gran Park at Jacksonville). The new interchange will link this business park and the Bartram Park DRI directly into the regional highway system and hasten their buildout.

- ***I-95 Widening/St. Johns County.*** This $84 million 35-mile long widening of I-95 from four lanes to six lanes through St. Johns County from Duval County to Flagler County began in 2002 and is scheduled for completion in 2004. Work is proceeding simultaneously on three segments: (1) Duval County line to International Golf Parkway (9.3 miles), (2) International Golf Parkway to SR207 (12.1 miles), and (3)

SR207 to the Flagler County line (13.4 miles).

- ***SR9A (I-295).*** When completed from I-95 in the Northside near the airport to I-95 and I-295 in southeastern Duval County, this freeway will change its temporary designation from State Road 9A to I-295, forming a continuous beltway around the Jacksonville urban core. Major sections of the eastern leg of this loop are already completed, including the segment from I-95 on the Northside to St. Johns Bluff Road south of Atlantic Boulevard, and the segment from Butler Boulevard to US1 at Greenland Road, south of the Avenues Mall. What remains are segments between Atlantic Boulevard and Butler Boulevard and between US1 and I-95 and I-295.

  When completed, development pressures in southeastern Duval County, extending into northern St. Johns County, will become more intense. The segment from St. Johns Bluff Road to Beach Boulevard is underway, with completion estimated in 2004. Completion of the segment from Beach Boulevard to Butler Boulevard is estimated in 2005. Completion of the final segment from US 1 to I-295, including a multi-level interchange at I-95 is underway, with completion expected by late 2006.

- ***SR9B.*** SR9B is the working name for a proposed north-south link from SR9A (I-295) south of Baymeadows Road to I-95 in the Bayard area. This proposed roadway, in effect, would be a branch of I-95, providing a more direct north-south link to the eastern loop of I-295 and southeastern Jacksonville. Ultimately, SR9B will extend into northern St. Johns County, crossing over I-95 to a new interchange at Race Track Road. Completion of the segment from SR9A to US1 is anticipated in 2006. Completion of the segment connecting US 1 to I-95 is estimated for late 2008, with the final segment from I-95 to Race Track Road estimated to be completed in 2010.

- ***St. Johns County North-South I-95 Relief Route*.** The St. Johns County Traffic Circulation Plan 2000-2015 shows a future extension of SR9B from Race Track Road south to SR16 near the World Commerce Center and continuing on to CR208 west of St. Augustine (see map at end of this section).

  The County has committed to the eventual completion of this north-south road to reduce future local traffic on I-95, in return for a relaxation by the FDOT of the level-of-service (LOS) standard on I-95 from Duval County to SR16. This change was necessary for the County to accommodate additional development in the corridor. Under an agreement with FDOT, the County has committed to begin construction of the segment between Race Track Road to CR210 by 2009. Construction of the central segment from CR210 to SR16 would begin by 2010. The final segment from SR16 to CR208 would begin by 2015.

- ***Other Long-Range Projects.*** St. Johns County's Traffic Circulation Plan 2000-2015, includes the proposal to widen CR210 to a four-lane arterial roadway from Ponte Vedra to I-95 and beyond to Greenbriar Road. This project would include a bridge over US1 and the railroad to eliminate the existing CR210 disconnect at US1. A companion proposal is to widen Race Track Road to a four-lane arterial and extend it east of US1 to connect with a realigned section of CR210 in the proposed Nocatee development. Both proposals originated with the Nocatee concept. Substantial progress on these proposals is not expected until after 2010.

  Another even longer-range proposal would involve a new St. Johns River crossing and outer beltway which would link I-10 in Duval County with I-95 in St. Johns County. Clay County, which has no Interstate-type highway service, is the key proponent of this concept, as it would help that County compete more effectively for a share of regional economic development. FDOT District 2 is currently studying feasibility and potential locations for a river crossing, and FDOT's Turnpike District has been approached about a potential toll road and bridge.

4.3 POTENTIAL LOCATIONS FOR ECONOMIC DEVELOPMENT

I-95 and US1 are the key corridors for existing and future economic development in St. Johns County. US1 is the older commercial and industrial corridor, but the I-95 corridor is expected to attract most activity in the future. The County has six I-95 interchanges: CR210, International Golf Parkway, SR16, SR207, CR206, and US1. All have different amounts of existing development, types and character of land uses, and opportunities for future development.

Best opportunities for development of suburban amenity-oriented office and business parks of the type found in southeastern Jacksonville are near the International Golf Parkway interchange. The CR210 and SR207 interchanges are well suited for development of traditional industrial parks and properties. The St. Augustine Industrial Park at SR207 and I-95 is home to two large food products distribution facilities -- Tree of Life and ConAgra.

The SR16 interchange area contains a mix of tourist-commercial and industrial activities, including the Interstate Commerce Center business park on the west side of I-95. Some of the most prominent manufacturing industries in the County are located in this area, including Tensolite, Ideal, and Riley Gear. There appears to be over 100 acres remaining for industrial development in this interchange area, including sites in the St. Augustine Center mixed-use development on the east side of I-95.

The CR206 and US1 interchange areas are rural, and are not viewed as having realistic development prospects for ten years or more.

Large-Scale Developments

Two existing and one pending Developments of Regional Impact (DRI) in the I-95 corridor and two existing DRIs in the US1 corridor have a combined total of more than 12 million square feet of authorized office and industrial space. These large developments and other significant locations in the County are profiled below.

- ***Saint Johns/World Golf Village.*** The 6,400-acre Saint Johns DRI is divided into two separate sections. The first is a 1,900-acre section (Interchange Tract), which occupies three quadrants of the I-95/ International Golf Parkway interchange. The other 4,500 acres (Six Mile Creek) is located a few miles to the west. The World Golf Village is the centerpiece of the Interchange Tract.

  The Saint Johns DRI is approved for 2,493,000 SF of office space, 2,464,000 of industrial space, 562,000 SF of retail space, 1,225 hotel rooms, and 7,200 housing units. All or virtually all office, industrial, and hotel development and the majority of retail development would occur in the Interchange Tract. Of these amounts, only 179,000 SF of office space, 127,000 SF of retail space, and 462 hotel rooms are developed to date, leaving substantial amounts for future development.

  The World Golf Village complex is located in the northeast quadrant of the I-95 interchange, but much of the future commercial, office, and industrial potential of the Interchange Tract is east of I-95. The southeast quadrant is platted into a number of sites for development of hotel, retail, and service uses. Development to date includes a 162-room hotel, restaurant, gas station/convenience store, and a 67,000 SF flex-office/retail/service project called Starpointe Business Park.

  The northeast quadrant features a 400-acre undeveloped business park called International Park, which has substantial frontage along I-95. This property is among the commercial/industrial land assets in the Interchange Tract purchased recently by Pittsburgh-based Hillman Properties. In addition, to this International Park tract and commercial sites in the southeast quadrant, Hillman purchased potential office/industrial land west of I-95 north of the World Golf Village.

  In addition to the Saint Johns DRI Interchange Tract, there are other active and potentially active properties on the east side of I-95. Among these is a 27-acre property near the entrance to International Park owned by the St. Joe Company, called Golfway Center. Golfway Center is a small business park with several office and retail parcels and one tenant to date -- Tree of Life, a national distributor of health foods. Tree of Life moved its headquarters from St. Augustine to a new 70,000 SF building here in 2002.

Another potentially active 300-acre property is located on the south side of International Golf Parkway adjacent to the Interchange Tract land. This 300-acre property is listed for sale as a potential industrial/commercial park.

- ***World Commerce Center.*** This pending 1,000-acre DRI is on the south side of International Golf Parkway opposite the World Golf Village complex. It has two miles of road frontage on International Golf Parkway, extending from I-95 to SR 16, and almost a mile of frontage on I-95. Proposed land uses include 2.2 million square feet of office space, 908,000 square feet of retail/service space, 405,000 square feet of industrial space, 1,000 hotel rooms and more than 1,100 residential units. Jacksonville-based Ring Power Corporation, which distributes and services heavy equipment, plans to relocate and consolidate its corporate operations to a new 350,000 square foot facility in the World Commerce Center in 2004.

  The World Commerce Center property, along with the World Golf Village complex, are included in the largest designated Mixed Use Commerce Center District (MUCCD) in the Northwest Sector (see map). This land use designation permits a mix of intensive employment-oriented and commercial development, including office, light industrial, retail, and service uses.

- ***Nocatee.*** Nocatee is the latest approved DRI in the southeastern Duval/northern St. Johns area, having been approved in 2002. It is a massive 15,000-acre new town located along CR210 spanning the distance between the Intracoastal Waterway and US1. Most land is in St. Johns County, but a small portion is in Duval County. Only 8,000 acres is planned for development. The other 7,000 acres is designated as conservation land and passive greenways.

  The project is approved for 14,000 residential units, 4.2 MSF of office space, 1.0 MSF of retail space, 250,000 SF of industrial space, 710 hotel rooms, and 710 assisted living units over a 25-year buildout period. Proposed commercial/industrial development is located mainly in the interior of the community, away from existing major highways. Development of these areas rests, in large measure, on the completion of proposed improvements to CR210 and Race Track Road, which are unlikely before 2010.

- ***St. Augustine Center.*** Although a mixed-use project, the centerpiece of this development is a large-scale factory outlet center which will total an estimated 700,000 square feet when the second phase is completed. The DRI was approved initially for up to 1.06 million square feet of retail/commercial space, 400 hotel rooms, 614 multifamily units, and 540,000 square feet of industrial space. The Chamber of Commerce indicates that current approvals include 35 acres for industrial development, plus 77 acres for either industrial or multifamily use.

- ***Marshall Creek (Palencia).*** This 1,400-acre DRI is located on US1 north of St. Augustine and due east of the World Golf Village. It is primarily a residential community, with authorization to develop up to 2,700 units. The Chamber of Commerce indicates that the project is also approved for up to 600,000 square feet of office space and 300,000 square feet of retail/commercial space. Market prospects for any significant office development in this location are considered to be very long range, in view of the presence of locations in the I-95 corridor.

- ***Cummer Trust Property.*** The Cummer Trust owns some 70,000 acres between and along the US1 and I-95 corridors in northern St. Johns County. The Trust recently received County Planning and Zoning Commission approval of a Comprehensive Plan amendment which would allow development of up to 8.7 million square feet of non-residential use and nearly 2,500 residential units on 8,000 acres, in return for selling 22,000 acres of conservation land to the St. Johns River Water Management District. Land designated initially for intensive commercial use is located on both sides of I-95 south of Race Track Road.

  More recently, the St. Johns County Northwest Sector Plan designated a large portion of this Cummer Trust property west of I-95 as a Mixed Use Commerce Center District. This is the same designation given to the World Golf Village area and World Commerce Center, and is reflective of large-scale development.

  Although there are no active development proposals for this property, their emergence in the next few years is probable given opportunities conferred by the Comprehensive Plan and Northwest Sector Plan. Office and light industrial uses are expected to account for major shares of the up to 8.7 MSF of non-residential rights potentially available, spurred on by the phased completion of SR9B and proximity to the Bartram Park and Flagler Center business parks in Duval County.

TABLE 15. OFFICE AND INDUSTRIAL DEVELOPMENT TRENDS FOR SELECTED ST. JOHNS COUNTY LOCATIONS, 1995-2002 (in thousands of square feet built)

Location	1995	1996	1997	1998	1999	2000	2001	2002	Totals
CR210/I-95 Area									
-- Office	9	--	--	--	--	--	--	--	9
-- Industrial	--	12	26	50	--	9	22	10	129
World Golf Village Area									
-- Office	--	--	65	--	--	113	--	71	249
-- Industrial	--	--	--	--	--	--	--	--	--
SR16/I-95 Area									
-- Office	--	--	--	--	--	17	--	--	17
-- Industrial	--	--	--	--	--	142	43	--	185
SR207/I-95 Area									
-- Office	--	--	--	--	--	--	--	--	--
-- Industrial	--	--	--	--	--	--	150	347	497
SR312/Dobbs Road Area									
-- Office	--	--	--	--	--	6	--	--	6
-- Industrial	9	9	56	--	18	--	41	--	134
US1/Flagler Hospital Area									
-- Office	5	9	25	13	7	--	15	--	74
-- Industrial	--	--	27	--	--	--	--	--	27
SRAIA/Ponte Vedra Area									
-- Office	33	60	59	75	49	75	8	70	429
-- Industrial	--	--	--	--	--	--	--	--	--
TOTAL -- All Areas									
-- Office	47	69	149	88	55	211	23	141	784
-- Industrial	9	21	109	50	18	151	256	357	972

Note: Office and industrial buildings as classified by the St. Johns County Property Appriaser Inc.

Source: URBANOMICS, Inc.

5. Industry Activity and Location Factors

NEW AND EXPANDED PLANT ANNOUNCEMENTS

The transportation equipment manufacturing industry was the leader in the number of new and expanded plant announcements in the US from 1999 to 2001, based on data from Whittaker Associates, Inc., an industry research firm which tracks business activity. This industry, which is well represented in St. Johns County, had 2,189 announcements in the US over the three-year period (see Table 16). The industry was also the most active in the southeastern states, with 327 announcements in the same period (see Table 17).

The 15 most active industries in the US and southeastern states are listed in these tables. Industries which match well with the Jacksonville metro area include:

- Transportation Equipment Manufacturing
- Professional, Scientific, and Technical Services
- Fabricated Metal Products Manufacturing
- Machinery Manufacturing
- Plastics & Rubber Products Manufacturing
- Food Products Manufacturing
- Primary Metals Manufacturing
- Paper & Paper Products Manufacturing
- Electrical Equipment Manufacturing
- Wholesale Trade

SITE LOCATION FACTORS

Area Development Magazine's Annual Corporate Survey identifies and ranks the importance of a number of business, cost, and quality of life factors in deciding where to locate. The most important are skilled labor, labor cost, financial incentives, and highway accessibility (see Table 18). Quality of life factors such as crime, schools, and housing are important, but less so than factors related directly to business operations and costs.

St. Johns County has access to a large metropolitan labor force with a range of skills and generally favorable wages. The County also has a favorable property tax environment compared to Duval County (see Table 19), and has recently adopted financial incentives to attract new business and facilitate expansion of existing industries. Excellent highway accessibility is a major asset of St. Johns County, which has six I-95 interchanges with ample room for development nearby.

St. Johns County is also an inviting place to live and work for those employers desiring a high quality of life location. The County is well known for its recreational, historical, and cultural amenities and attractions. It is bounded on the west by the broad and picturesque St. Johns River and on the east by the Intracoastal Waterway and Atlantic Ocean. St. Augustine, the oldest city in the US, is the historic and cultural center of the County. The County is home to the headquarters of the men's professional golf tour (PGA Tour) and the World Golf Hall of Fame.

Other key quality of life factors include an excellent school system and low crime rate. The County ranks higher than the state and as high or higher than other counties in the region in school performance, as measured by the Florida Comprehensive Assessment Test (FCAT) of reading and math skills (see Table 19). The County has the highest graduation rate and lowest dropout rate in the region, and among the best in Florida. It also boasts of a comparatively low crime rate, ranking ahead of the state and other counties in the Jacksonville metro area, except Clay. However, the amount of tourism and seasonal resident activity in St. Johns County tends to skew the crime rate, which is measured against the resident population.

TABLE 16. FIFTEEN LEADING INDUSTRIES IN ANNOUNCEMENTS OF NEW AND EXPANDED FACILITIES IN THE U. S., 1999-2001

Number of Ann'ments	NAICS Code	Industry	Average Jobs	Average SF (000)
2,189	336	Transportation Equip. Mfg.	155	108
1,900	541	Professional, Scient. & Tech. Svcs.	221	126
1,367	332	Fabricated Metal Product Mfg.	77	68
1,306	333	Machinery Manufacturing	115	77
1,252	326	Plastics & Rubber Products Mfg.	77	97
1,235	325	Chemical Manufacturing	145	122
1,185	311	Food Products Manufacturing	139	110
1,176	334	Computer & Electronics Prod. Mfg.	254	119
802	331	Primary Metals Manufacturing	78	81
681	335	Electrical Equipment Manufacturing	156	96
681	421	Wholesale Trade, Durable Goods	108	214
671	493	Warehousing and Storage	158	172
623	422	Wholesale Trade, Non Durables	179	178
608	322	Paper & Paper Products Mfg.	88	125
587	321	Wood Products Manufacturing	89	82

Notes:
(1) NAICS -- North American Industry Classification System
(2) SF -- square feet

Source: Whittaker Associates, Inc.

TABLE 17. FIFTEEN LEADING INDUSTRIES IN ANNOUNCEMENTS OF NEW AND EXPANDED FACILITIES IN THE SOUTHEASTERN U. S., 1999-2001

Number of Ann'ments	NAICS Code	Industry	Average Jobs	Average SF (000)
327	336	Transportation Equip. Mfg.	165	89
212	332	Fabricated Metal Product Mfg.	92	80
206	333	Machinery Manufacturing	143	85
204	325	Chemical Manufacturing	130	120
203	326	Plastics & Rubber Products Mfg.	92	108
201	541	Professional, Scient. & Tech. Svcs.	255	67
198	313	Textile Mills	102	80
161	311	Food Products Manufacturing	143	104
158	334	Computer & Electronics Prod. Mfg.	186	129
122	321	Wood Products Manufacturing	86	86
119	331	Primary Metals Manufacturing	74	64
111	322	Paper & Paper Products Mfg.	69	121
108	327	Non-Metallic Mineral Mfg.	65	69
107	335	Electrical Equipment Manufacturing	121	96
104	337	Furniture & Related Products Mfg.	147	145

Notes:
(1) NAICS -- North American Industry Classification System
(2) SF -- square feet

Source: Whittaker Associates, Inc.

TABLE 18. INDUSTRY SITE SELECTION FACTORS, 2001 & 2002

Ranking	Site Selection Factor	2001	2002
Business Operations and Cost Factors			
1	Availability of skilled labor	91.6	90.9
2	Labor costs	91.5	89.9
3	Tax exemptions	82.7	88.2
4	State and local incentives	81.4	88.0
5	Highway accessibility	87.9	86.6
6	Corporate tax rate	79.0	84.6
7	Proximity to major markets	80.2	83.7
8	Occupancy or construction costs	82.3	82.4
9	Energy availability and costs	86.4	80.9
10	Environmental regulations	78.8	76.7
11	Availability of telecommunications services	83.3	76.1
12	Availability of land	79.7	75.2
13	Cost of land	77.3	74.0
14	Low union profile	78.0	69.4
15	Availability of broadband telecom services	61.3	66.7
16	Proximity to suppliers	67.1	61.8
17	Availability of long-term financing	48.7	60.0
18	Right-to-work state	67.6	58.0
19	Raw materials availability	64.6	56.0
20	Availability of unskilled labor	59.5	55.1
21	Accessibility to major airport	55.4	54.0
22	Training programs	51.4	44.7
23	Proximity to technical university	34.6	33.4
24	Railroad service	27.8	22.6
25	Waterway or oceanport accessibility	18.8	19.3
Quality of Life Factors			
1	Low crime rate	74.4	75.9
2	Health facilities	65.3	67.2
3	Ratings of public schools	57.2	65.7
4	Housing availability	57.3	64.2
5	Housing costs	60.6	63.0
6	Colleges and universities in area	44.8	48.1
7	Cultural opportunities	40.3	46.3
8	Recreational opportunities	39.2	45.9
9	Climate	47.4	43.5

Source: Area Development, Annual Corporate Survey, 12/02

TABLE 19. SELECTED COST OF LIVING AND QUALITY OF LIFE FACTORS IN ST. JOHNS COUNTY AND OTHER METRO AREA COUNTIES

Factor	ST. JOHNS	Duval	Clay	Nassau	Florida
Local Taxes					
County Property Tax Millage Rate, 2002	***16.630***	19.605	18.223	16.806	NA
Sales Tax Rate (%)(1)	***6.0***	7.0	7.0	7.0	NA
Communications Services Tax Rate (%)(2)	***1.84***	5.82	6.52	2.44	NA
Local School Performance					
Graduation Rate, 2000-01(%)	***77.1***	55.9	67.3	55.1	63.8
Dropout Rate, 2000-01 (%)	***2.4***	8.3	2.7	4.9	3.8
FCAT Reading Scores, 2002 Average (3)					
-- Grade 4	***315***	303	314	306	294
-- Grade 8	***308***	293	310	302	295
FCAT Math Scores, 2002 Average (3)					
-- Grade 4	***311***	283	304	290	294
-- Grade 8	***318***	301	321	317	305
Crime Rate					
1999 Rate (#/100,000 Pop)	***3,928***	6,858	3,415	4,671	6,098
Change from 1998 (%)	***-7.16***	-10.75	-8.43	+16.42	-10.77

Notes:
(1) Includes state sales tax rate of 6.0 percent; the difference is the local option tax
(2) Tax on telecommunications, cable service, etc.; rate shown is for unincorporated area
(3) FCAT is Florida Comprehensive Assessment Test, administered annually

Source: Florida Departments of Revenue, Education, and Law Enforcement; and URBANOMICS, Inc.

6. Regional Target Industries

BACKGROUND

Industrial targeting studies for Jacksonville and participating counties in the region were completed in 1997 and again in 2002. The 1997 study was sponsored by the Jacksonville Regional Chamber of Commerce and Jacksonville Electric Authority and was conducted by the consulting team of Lockwood Greene Consulting and Fluor Daniel Consulting. Seven clusters of industries were identified as the basis for recruitment of new business.

The 2002 study was undertaken for the Jacksonville Regional Chamber of Commerce by Whittaker Associates, Inc. Its purpose is to update and expand on the 1997 study, and culminated in the First Coast Targeting Plan, issued in May 2002. This new economic development strategy identifies eight industry clusters to serve as the basis for regional economic development marketing efforts. There are number of similarities between the 1997 and 2002 targets, but also some differences. One of the major differences is that the Motor Vehicle Parts and Accessories cluster is eliminated and at least one new cluster -- Distribution and Logistics -- is added. Another new cluster -- Specialized Manufacturing -- is added to encompass a wide variety of manufactured products, including equipment and components used by other cluster industries.

The 2002 Plan identifies Financial and Insurance Services and Information Technology as separate clusters, whereas they were covered, at least in part, in two 1997 study clusters -- Office, Headquarters, Customer Service, Technical Support, and Related Activities and Software and Electronic Commerce. The latter has been eliminated as a discrete cluster, but the former "Office...." cluster is incorporated in the new Finance and Insurance Services and Headquarters clusters.

Some new clusters cut across two or more sectors in order to combine various aspects of an industry. Thus, as opposed to defining a cluster as a narrow set of manufacturing activities, a new cluster may include research, manufacturing, distribution, and or service delivery components. A case in point is the new Medical Products, Services & Research cluster, which includes drugs, medical equipment and supplies, health care services, and research.

TARGET INDUSTRY CLUSTERS

The eight clusters and their component industries are outlined below in order of their priority.

- ***Information Technology.*** This cluster includes software development and data processing services; call centers; telecommunications services, and internet services and development. The following SIC codes and industries are included:

737	Computer and Data Processing Services
7389	Business Services, NEC (includes telemarketing services)
481	Telephone Communications
482	Telegraph & Other Communications

- ***Financial and Insurance Services.*** The following SIC codes and industries are included in this cluster:

60	Depository Institutions (including commercial banks)
61	Nondepository Institutions (including credit card companies)
62	Security and Commodity Brokers
63	Insurance Carriers

- ***Medical Products, Services, and Research.*** This sector is inclusive of medical equipment, pharmaceutical products, biotechnology, and health services. The following SIC codes and industries are included:

2833	Medicinals and Botanicals
2834	Pharmaceutical Preparations
2835	Diagnostic Substances
2836	Biological Products, Other
3821	Laboratory Apparatus and Furniture
3826	Analytical Instruments
3827	Optical Instruments and Lenses
3841	Surgical and Medical Instruments
3842	Surgical Appliances and Supplies
3843	Dental equipment and Supplies
3844	X-Ray Apparatus and Tubes
3845	Electromedical Equipment
3851	Ophthalmic Goods
5047	Wholesale -- Medical and Hospital Equipment
512	Wholesale -- Drugs, Proprietaries, and Sundries
806	Hospitals
807	Medical and Dental Laboratories
808	Home Health Care Services
809	Health and Allied Services, NEC
8731	Commercial Physical Research

8734 Testing Laboratories

- ***Headquarters.*** This cluster is aimed at mid-tier companies as opposed to large Fortune 500 companies, and is inclusive of firms in the manufacturing, distribution, retail trade, finance, and service industries.

- ***Aviation & Aerospace.*** This was an important cluster in the 1997 study and includes the following SIC codes and industries:

  3721 Aircraft (assembly, rework, repair,)
  3724 Aircraft Engines and Engine Parts
  3728 Aircraft Parts and Equipment, NEC
  3761 Guided Missiles and Space Vehicles
  3769 Space Vehicle Equipment, NEC
  3812 Search and Navigation Equipment
  5088 Wholesale -- Transportation Equipment and Supplies
  9661 Space Research and Technology

- ***Distribution & Logistics.*** This cluster includes the following SIC codes and industries:

  42 Trucking and Warehousing
  473 Freight Transportation Arrangement
  478 Miscellaneous Transportation Services
  50 Wholesale Trade, Durable Goods
  51 Wholesale Trade, Non-Durable Goods

- ***Specialized Manufacturing.*** This cluster include a number of activities and products, including industries which supply other clusters (medical, aerospace, and electronics) with materials, parts, components, and equipment. The following SIC codes and industries are included in this cluster:

  34 Fabricated Metal Products
  353 Construction and Related Machinery
  354 Metalworking Machinery
  355 Special Industry Machinery
  356 General Industry Machinery
  357 Computer and Office Equipment
  358 Refrigeration and Service Machinery
  362 Electrical Industrial Apparatus
  364 Electric Lighting and Wiring Equipment
  369 Misc. Electrical Equipment and Supplies
  3822 Environmental Controls

3823 Process Control Instruments
3824 Fluid Meters and Counting Devices
3825 Instruments to Measure Electricity
3829 Measuring and Controlling Devices, NEC
3732 Boat Building and Repairing
3944 Games, Toys, and Children's Vehicles

- ***Electronics & Semiconductors.*** This cluster is substantially similar to that defined in the 1997 study, and includes the following SIC codes and industries:

3571 Electronic Computers
3572 Computer Storage Devices
3577 Computer Peripheral Equipment, NEC
366 Communications Equipment
3674 Semiconductors and Related Devices
3678 Electronic Connectors
3679 Electronic Components, NEC
5045 Wholesale -- Computers, Peripherals, and Software
5049 Wholesale -- Professional Equipment, NEC

7. St. Johns County Target Industries

SELECTION CRITERIA

Identification of business opportunities suitable to St. Johns County and for which the County is or can be competitive is based on one or more of the following criteria:

- They reflect the industries identified in the comprehensive 1998 Target Industry Study for St. Johns County.

- They are among those industry targets identified for the Jacksonville area in the original 1997 targeting study and the recently-completed 2002 update. St. Johns County is a participant in a regional marketing program spearheaded by the Jacksonville Regional Chamber of Commerce and is a viable candidate for many of the industries prescribed for the region in these targeting studies.

- They reflect types of businesses and build on clusters presently found in St. Johns County and the surrounding region and which have potential for growth. St. Johns County has an interesting array of firms outside clusters and industries prescribed in the regional targeting studies. These local activities, including food-related activities, provide the basis for other clusters specific to St. Johns County.

- They are otherwise suited to the County because of its specific locational attributes and features, human and natural resources, image, and character.

Size of firms being targeted for recruitment is an important factor. Efforts should be concentrated primarily on attracting firms in the range of 50 to 200 employees, which are large enough to impact the community but not so large as to overwhelm the local labor market. Attraction of high wage and high value-added industries is also important in terms of increasing household incomes and maximizing local economic impacts.

The above criteria are the basis for selecting business clusters and specific industries for St. Johns County. Recommended clusters and component industries include:

- Industries identified in Jacksonville regional target industry studies for which St. Johns County is attractive and competitive.

- Other industries specific or unique to St. Johns County. This group includes activities (e.g., specialty food and plastic products) not among the Jacksonville targets, but which are found in St. Johns County and have potential for growth.

RECOMMENDED TARGET INDUSTRIES

Seven clusters of industries are defined and recommended below for St. Johns County. They are a combination of office-related and industrial activities recommended for the County in the original 1998 target industry study and others identified in the 2002 First Coast Targeting Plan (see Section 6, above). The seven industry groups recommended for St. Johns County are:

- Corporate Office, Financial and Information Services
- Aviation and Automotive Industries
- Specialty Industrial and Commercial Products
- Food Products and Distribution
- Medical Products and Health Sciences
- Recreational Equipment and Sports
- Distribution and Logistics

Corporate Office, Financial and Information Services Group

This group expands on and supersedes the General Offices cluster identified in the 1998 St. Johns County study. Elements of three individual clusters identified in the 2002 First Coast Targeting Plan are combined into one office-related group of activities. The three clusters from the First Coast Targeting Plan are Information Technology, Financial and Insurance Services, and Headquarters.

An increasing share of office-related activities will spill over into St. Johns County as business parks and properties in southeastern Duval County are built out. The financial and insurance services industry, which is a major factor in Duval County, has not yet migrated south into St. Johns. However, the County does have some existing headquarters activity, including the PGA Tour, Tree of Life, and the American Culinary Federation. Ring Power Corporation plans to relocate its headquarters to the County in 2004.

This group includes, but is not limited to, the following industries and activities:

- ***Corporate and Regional Headquarters*** (all sectors)

- ***Operations and Administrative Support Centers, Claims Processing Centers, and Credit Processing Centers*** for the following:
  - 602 Commercial Banks
  - 614 Personal Credit Institutions
  - 621 Security Brokers and Dealers
  - 631 Life Insurance Carriers

- 632 Medical Service and Health Insurance Carriers
- 633 Fire, Marine, and Casualty Insurance Carriers
- 637 Pension, Trust, and Welfare Funds
- 6712 Bank Holding Companies
- 6726 Investment Offices
- 6798 Real Estate Investment Trusts

- ***Other Communications and Information-Related Services***, including
  - 4813 Telephone Communications Services
  - 4822 Non-Vocal Communications Services
  - 7331 Direct Mail Advertising Services
  - 7372 Prepackaged Software
  - 7374 Data Processing Services
  - 7375 On-Line Services
  - 7389 Travel Reservation Services; Telemarketing Services

Aviation and Automotive Industries Group

This group combines and supersedes two clusters recommended in the 1998 St. Johns County study -- Aircraft Parts and Equipment and Auto Parts and Accessories. The group includes certain industries in the Aviation & Aerospace cluster defined in the 2002 First Coast Targeting Plan. St. Johns County is already well represented in this industry group by Northrop-Grumman. In addition, Ideal and Tensolite manufacture products used in the aircraft and auto industries.

This group includes, but is not limited to, the following industries and activities:

- ***Aviation Industries,*** including:
  - 3694 Engine Electrical Equipment
  - 3721 Aircraft Rework, Modification, and Repair
  - 3724 Aircraft Engines and Engine Parts
  - 3728 Aircraft Parts and Equipment (other)
  - 3812 Avionics

- ***Automotive Industries***, including:
  - 3465 Automotive Stampings
  - 3592 Carburetors, Piston Rings, and Valves
  - 3647 Vehicular Lighting Equipment
  - 3694 Engine Electrical Equipment
  - 3714 Motor Vehicle Parts and Accessories

Specialty Industrial and Commercial Products Group

This group combines and supersedes the Specialty Industrial Products and Specialty Consumer Products clusters identified in the 1998 St. Johns County study. The group also includes industries in the Specialized Manufacturing cluster as identified in the 2002 First Coast Targeting Plan. This group includes a wide range of equipment, parts, components, and supplies made from metal, plastic, rubber, and paper.

Industries in this group are drawn from several manufacturing sectors including paper products, printing and publishing, primary metals, fabricated metal products, non-electrical machinery, and electrical equipment and electronics. St. Johns County is well represented in the group by a number of firms including Hydro Aluminum, Riley Gear, Tensolite, Vinyl Industrial Products, and Dobbs Enterprises, among many others.

This group includes, but is not limited to, the following industries and activities:

- ***Paper and Plastic Products and Related Activities***, including:
  - 2671 Paper Products, Coated and Laminated
  - 2721 Periodicals (publishing)
  - 2741 Miscellaneous Publishing
  - 2782 Blankbooks and Looseleaf Binders
  - 2789 Bookbinding and Related
  - 308 Miscellaneous Plastics Products

- ***Metal Products and Machinery***, including:
  - 3315 Steel Wire and Related Products
  - 3354 Aluminum Extruded Products
  - 3357 Nonferrous Wiredrawing & Insulating
  - 3429 Hardware, NEC (including metal clamps)
  - 3462 Iron and Steel Forgings (including gears)
  - 3556 Food Products Machinery
  - 3566 Speed Changers, Drives, and Gears
  - 3569 General Industrial Machinery, NEC

- ***Electrical Equipment and Electronics***, including
  - 3621 Motors and Generators
  - 3625 Relays and Industrial Controls
  - 366 Communications Equipment
  - 3672 Printed Circuit Boards
  - 3679 Electronic Components, NEC

Food Products Group

This group expands on and supersedes the Specialty Foods Products cluster identified in the 1998 St. Johns County study. The group is a niche opportunity specific to St. Johns County, and is not among those included in the 2002 First Coast Targeting Plan. The County is well represented in this group, in both manufacturing and distribution. On the production side, existing firms include Whetstone Candy, Dominex, and American Natural Snacks. In addition, the St. Augustine area is the headquarters of the American Culinary Federation, and the St. Augustine Technical Institute has a well-regarded culinary arts program.

This group includes, but is not limited to, the following industries and activities:

- ***Food Products***, including:
  - 2033 Canned Fruits and Vegetables
  - 2037 Frozen Fruits and Vegetables
  - 2038 Frozen Specialties, NEC
  - 2052 Cookies, Crackers, and Pretzels
  - 2064 Candy & Other Confectionery Products
  - 2066 Chocolate & Cocoa Products
  - 2068 Salted and Roasted Nuts and Seeds
  - 2096 Potato Chips and Similar Snacks

Medical Products and Health Sciences Group

This group updates and supersedes three clusters included in the 1998 St. Johns County study -- Medical Equipment and Supplies, Drug-Related Products, and Specialized Health Services. The group also incorporates industries and activities drawn from the Medical Products, Services, and Research cluster defined in the 2002 First Coast Targeting Plan.

St. Johns County is not presently a factor in the industries and activities included in this group, but it is the third priority of eight clusters in the First Coast Targeting Plan. Duval County has several major employers in this group, including Vistakon, Medtronic-Xomed, and PSS World Medical, plus the world-renown Mayo Clinic. St. Johns County is well positioned in terms of proximity to these employers and lifestyle to benefit from regional marketing of this cluster. The University of St. Augustine for Health Sciences illustrates niche opportunities available in St. Johns County.

This group includes, but is not limited to, the following industries and activities:

- ***Biological and Pharmaceutical Products***, including:
  - 2833 Medicinals and Botanicals

2834 Pharmaceutical Preparations
2835 Diagnostic Substances

- ***Medical Equipment and Supplies***, including:
  - 3841 Surgical and Medical Instruments
  - 3842 Surgical Appliances and Supplies
  - 3843 Dental Equipment and Supplies
  - 3845 Electromedical Equipment
  - 3851 Ophthalmic Goods

- ***Specialized Health Services and Sciences***, including:
  - NA Sports Medicine
  - NA Geriatric Wellness
  - 8731 Biomedical Research

Recreational Equipment and Sports Group

This group expands on and supersedes the Recreational Equipment cluster identified in the 1998 St. Johns County study. The group is specific to St. Johns County, although some individual industries are included in the Specialized Manufacturing cluster defined in the 2002 First Coast Targeting Plan. St. Johns County has two large employers in this group: Luhrs Corp., pleasure boat builder, and the PGA Tour, manager of the men's professional golf tour.

This group includes, but is not limited to, the following industries and activities:

- ***Recreational Equipment and Related Products***, including:
  - 3429 Marine Hardware
  - 3519 Marine Engines and Outboard Motors
  - 3732 Boat Building and Repair
  - 3799 Golf Carts, Jet Skis, etc.
  - 3812 Marine Instruments and Electronics
  - 3944 Games, Toys, and Children's Vehicles
  - 3949 Sporting and Athletic Goods

- ***Destination Retail, Sports Marketing and Management***, including:
  - 5941 Sporting Good Retailers (e.g, large specialty outfitters)
  - 7941 Sports Clubs, Managers, and Promoters

Note: Destination retail refers to special consumer-oriented activities, such as a large outfitter, which attract high volumes of visitors from long distances, and which otherwise complement the recreation and sports cluster and tourism and visitors vision for the County.

Distribution & Logistics Group

This group is among eight identified clusters in the 2002 First Coast Targeting Plan. St. Johns County is suitable and competitive as a location for trucking, warehousing, and wholesale trade activities because of the presence of six I-95 interchanges in the County, plus main line rail service provided through the entire length of the County by the Florida East Coast Railroad. The County has already proven attractive to two food distributors -- Tree of Life and ConAgra -- which have large distribution facilities near the SR207/I-95 interchange southwest of St. Augustine.

This group includes, but is not limited to, the following industries and activities:

42	Trucking and Warehousing
50	Wholesale Trade, Durable Goods
51	Wholesale Trade, Non-Durable Goods
---	Distribution Centers Operated by Manufacturers and Retail Store Chains

SUMMARY OF RECOMMENDED TARGETS

These seven industry groups and subindustries in each are summarized in Table 20. SIC (Standard Industrial Classification) and comparable NAICS (North American Industry Classification System) code numbers are shown.

TABLE 20. SUMMARY OF RECOMMENDED CLUSTERS AND INDUSTRIES

SIC Code	Cluster and Industry	NAICS Codes
Corporate Office, Financial and Information Services Group		
4813	Telephone Communications Services	51331, 51333, 51334
4822	Non-Vocal Communications Services	51331
602	Commercial Banks	52211, 52221
614	Personal Credit Institutions	52221
621	Security Brokers and Dealers	52311, 52312
631	Life Insurance Carriers	52411
632	Medical Service and Health Insurance Carriers	52411
633	Fire, Marine, and Casualty Insurance Carriers	52412
637	Pension, Trust, and Welfare Funds	52429, 52511
6712	Bank Holding Companies	55111
6726	Investment Companies	52599
6798	Real Estate Investment Trusts	52593
7331	Direct Mail Advertising Services	51114, 54186
7372	Prepackaged Software	51121
7374	Data Processing Services	51421
7375	Internet On-Line Services	51419
7389	Travel Reservation Services; Telemarketing Services	56142, 56159
Aviation and Automotive Industries Group		
3465	Automotive Stampings	33637
3592	Carburetors, Piston Rings, and Valves	33631
3647	Vehicular Lighting Equipment	33632
3694	Engine Electrical Equipment	33632
3714	Motor Vehicle Parts and Accessories	33631, 33632, 33633, 33634, 33635, 33639
3721	Aircraft (rework, modification, outfitting, repair)	33641
3724	Aircraft Engines and Engine Parts	33641
3728	Aircraft Parts and Equipment (other)	33291, 33641
3812	Avionics	33451

TABLE 19. SUMMARY OF RECOMMENDED CLUSTERS AND INDUSTRIES (continued)

SIC Code	Cluster and Industry	NAICS Codes
Specialty Industrial and Commercial Products Group		
2671	Paper Products, Coated and Laminated	32222, 32611
2721	Periodicals (publishing)	51112
2741	Miscellaneous Publishing	51114, 51119
2782	Blankbooks and Looseleaf Binders	32311
2789	Bookbinding and Related	32312
308	Miscellaneous Plastics Products	32612, 32613, 32619
3315	Steel Wire and Related Products	33122
3354	Aluminum Extruded Products	33131
3357	Nonferrous Wiredrawing & Insulating	33131, 33142, 33592
3429	Hardware, NEC (including clamps)	33272, 33299
3462	Iron and Steel Forgings (including gears)	33211
3556	Food Products Machinery	33329
3566	Speed Changers, Drives, and Gears	33361
3569	General Industry Machinery, NEC	33399
3621	Motors and Generators	33531
3625	Relays and Industrial Controls	33531
366	Communications Equipment	33421, 33422, 33429
3672	Printed Circuit Boards	33441
3679	Electronic Components, NEC	33441
Food Products and Distribution Group		
2033	Canned Fruits and Vegetables	31142
2037	Frozen Fruits and Vegetables	31141
2038	Frozen Specialties, NEC	31141
2052	Cookies, Crackers, and Pretzels	31182, 31191
2064	Candy & Other Confectionery Products	31133, 31134
2066	Chocolate & Cocoa Products	31133
2068	Salted and Roasted Nuts and Seeds	31191

TABLE 19. SUMMARY OF RECOMMENDED CLUSTERS AND INDUSTRIES (continued)

SIC Code	Cluster and Industry	NAICS Codes
Food Products Group (continued)		
2096	Potato Chips and Similar Snacks	31191
Medical Products and Health Sciences Group		
2833	Medicinals and Botanicals	32541
2834	Pharmaceutical Preparations	32541
2835	Diagnostic Substances	32541
3841	Surgical and Medical Instruments	33911
3842	Surgical Appliances and Supplies	33911, 32229
3843	Dental Equipment and Supplies	33911
3845	Electromedical Equipment	33451
3851	Ophthalmic Goods	33911
8731	Biomedical Research	54171
Recreational Equipment and Sports Group		
3429	Marine Hardware	33251
3519	Marine Engines and Outboard Motors	33631
3732	Boat Building and Repair	33661
3812	Marine Instruments and Electronics	33451
3944	Games, Toys, and Children's Vehicles	33993
3949	Sporting and Athletic Goods	33992
5941	Sporting Goods Retailers (outfitters)	45111
7941	Sports Clubs, Managers, and Promoters	71121, 71132
Distribution and Logistics		
42	Trucking and Warehousing	484, 493
50	Wholesale Trade, Durable Goods	421
51	Wholesale Trade, Nondurable Goods	422

Notes:
(1) NEC -- Not elsewhere classified

Source: URBANOMICS, Inc.