

# NW 27th – 37th Avenue Industrial Corridor

## Industrial Land Use Analysis



### Contents

Introduction	2
Land Uses	2
Real Estate Characteristics	6
Industrial Business Data	7
Obstacles to Development	11
Economic Incentives	11

### Maps

Existing Land Use	3
Future Land Use	4
Existing Industrial Uses	5
Water & Sewer Infrastructure	12
Economic Benefit Zones	13

## Introduction

The NW 27<sup>th</sup>-37<sup>th</sup> Corridor is located in the north central area of the County from the Miami River to NW 135<sup>th</sup> Street between NW 2<sup>th</sup> and NW 37<sup>th</sup> Avenue. It is characterized by a mixed pattern of existing land uses (see Map 1). The largest component of which is industrial uses that account for over one-quarter of the total within the corridor.

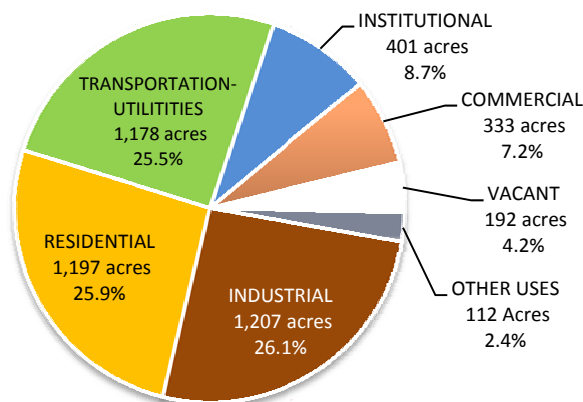
The corridor has three distinct sub-areas. The extreme southern portion that basically stretches from the Miami River to State Road 112 is predominantly used for marine industrial purposes. The area north of NW 107<sup>th</sup> Street, and abutting Opa-Lacka Airport, has many large parcels with buildings that are used as warehouse space. Other large properties serve as storage areas. The central area is mixed in terms of use.

The focus of this report is the existing nature of this area in terms of current and potential future land use, and specific business characteristics. This will provide a portrait of the area and serve as basis for determining the possible future of the corridor.

## Land Uses

The corridor is 4,620 acres of which the principal existing land use is industrial activity. As can be seen in Figure 1, it accounts for 26.1 percent of the total. This is followed in importance by residential, and transportation and utilities that account for 25.9 and 25.5 percent, respectively. Other uses include institutional and commercial. The amount of vacant land is relatively low at 4.2 percent or 192 acres. However, as 11.8 percent of the 1,153 acres that are used for industrial purposes are considered industrial extensive, it appears that there is a greater amount of industrial vacant land than, in fact, there is. This follows as industrial extensive includes properties used primarily for storage and have a limited amount of building square footage. (See Map 2)

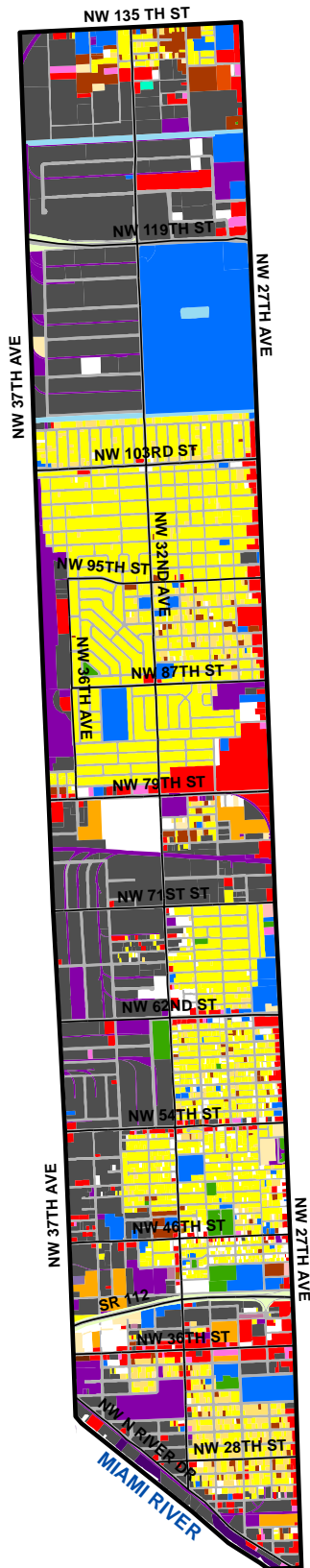
**Figure 1. Existing Uses in NW 27th - 37th Avenue Corridor (Acres)**



Source: Miami-Dade County Department of Planning and Zoning, Research Section, February 2011.

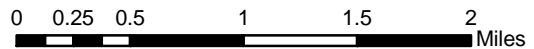
Map 3 shows future land uses in the corridor. As can be seen by examining this map and Map 1 that existing land uses, there is limited opportunity for expanding industrial activity into areas in the corridor that currently are not used for industrial purposes.

# MAP 1: EXISTING LAND USE IN STUDY CORRIDOR



## Legend

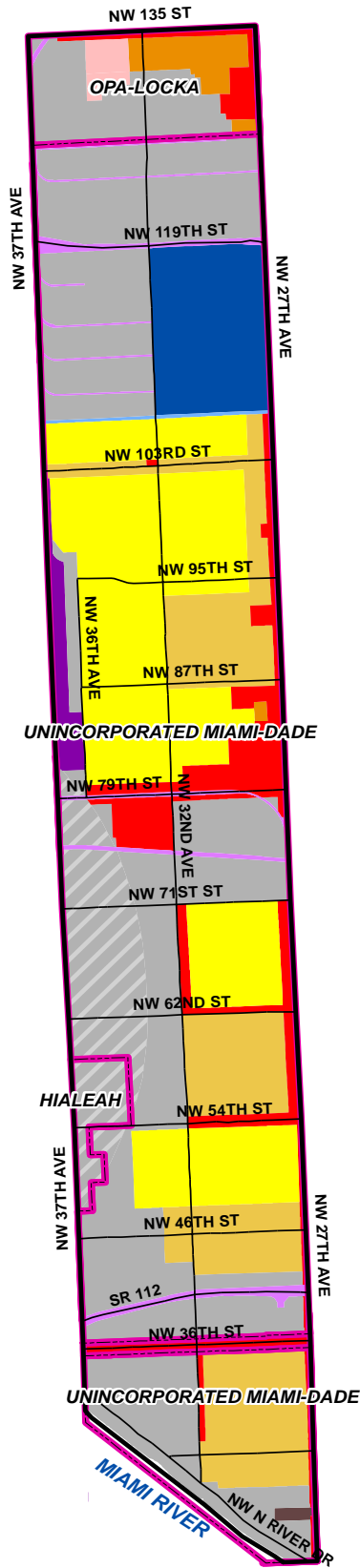
- Single-Family
- Two-Family Duplexes
- Mobile Home Parks
- Townhouses
- Low-Density Multi-Family
- High-Density Multi-Family
- Residential-Government Owned Housing
- Transient-Residential (Hotels, Motels)
- Commercial, Shopping Centers, Stadia
- Office
- Mixed Use-Business/Residential
- Institutional
- Industrial Extraction
- Industrial
- Industrial Intensive, Office type of use
- Industrial intensive, Commercial Condominium type of use
- Airports, Ports
- Communications, Utilities, Terminals
- Streets, Roads, Expressways, Ramps
- Streets, Expressway R/W
- Agriculture
- Parks, Preserves, Conservation Areas
- Water Conservation Areas
- Vacant Government Owned, Unprotected
- Vacant, Protected, Privately Owned
- Vacant, Protected, Government Owned
- Vacant Privately Owned, Unprotected
- Canal right-of-way
- Inland Waters



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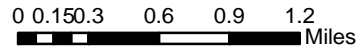
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# MAP 2: FUTURE LAND USE IN STUDY CORRIDOR



## FUTURE LAND USE

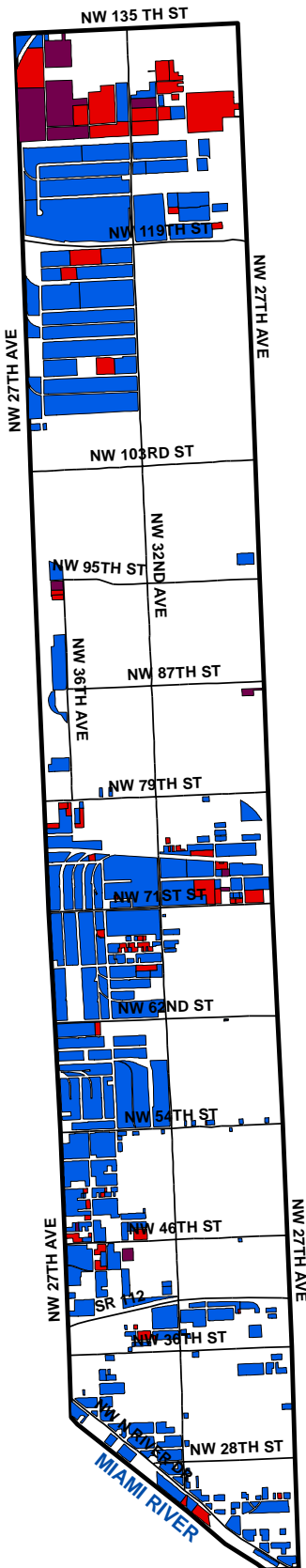
- ESTATE DENSITY (EDR) 1-2.5 DU/AC
- ESTATE DENSITY W/ DENSITY INCREASE 1
- LOW DENSITY (LDR) 2.5-6 DU/AC
- LOW DENSITY W/ DENSITY INCREASE 1
- LOW-MEDIUM DENSITY (LMDR) 6-13 DU/AC
- LOW-MEDIUM DENSITY W/ DENSITY INCREASE 1
- MEDIUM DENSITY (MDR) 13-25 DU/AC
- MEDIUM DENSITY W/ DENSITY INCREASE 1
- MEDIUM-HIGH DENSITY (MHDR) 25-60 DU/AC
- HIGH DENSITY (HDR) 60-125 DU/AC
- (DI-2) (EDR) TWO DENSITY INCREASE W/ URBAN DESIGN
- (DI-2) (LDR) TWO DENSITY INCREASE W/ URBAN DESIGN
- INDUSTRIAL AND OFFICE
- RESTRICTED INDUSTRIAL AND OFFICE
- BUSINESS AND OFFICE
- OFFICE/RESIDENTIAL
- INSTITUTIONS, UTILITIES AND COMMUNICATION
- PARKS AND RECREATION
- MIAMI METRO ZOO ENTERTAINMENT AREA
- AGRICULTURE
- OPEN LAND
- ENVIRONMENTAL PROTECTION
- ENVIRONMENTALLY PROTECTED PARKS
- WATER
- TRANSPORTATION (ROW, RAIL, METRORAIL, ETC.)
- TERMINALS
- MUNICIPAL BOUNDARIES



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# MAP 3: EXISTING INDUSTRIAL USES IN STUDY CORRIDOR

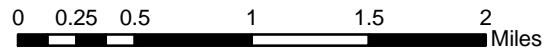


## Legend

### Industrial land

-  Junk Yard.
-  Industrial Extensive
-  Industrial Intensive
-  Roads

<u>INDUSTRIAL USES</u>	<u>ACRES</u>
Industrial intensive	955
Industrial extensive	136
Junk Yard	62
	<b>1153</b>



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## Real Estate Characteristics

The economic health of any area can be gauged by the prevalent vacancy rates. This measure, more than any other, will show the vibrancy of the area and the demand for what it has to offer. In the Corridor, we found 1,484,690 square feet of vacant industrial space out of a total of 22,720,284 square feet. This results in approximately a seven percent vacancy rate. At the same time, we analyzed two other Industrial areas in close proximity to the Corridor. The areas selected were: a) West Airport, and B) Hialeah. The West Airport area consisted of all land immediately west of the airport, north of the 836 Expressway and south of Okeechobee Road. Hialeah included the land inside the municipal boundary of Hialeah.

The results showed that both Hialeah and the West Airport areas have a much newer inventory of industrial properties, where the average age for industrial buildings is 38.3 years for Hialeah, and 37.7 years for the West Airport area. The Corridor's inventory is older with an average age for industrial buildings of 47.4 years. At the same time, we compared the cost per square foot and found that the West Airport area had an average of \$6.94, the rate for Hialeah was \$6.21, and the Corridor had the lowest at \$5.58. Finally, we compared vacancy rates for the three areas and found that the Corridor had the lowest at 7 percent, followed by the West Airport area with 8 percent, and Hialeah with 12 percent. (See Table 1).

Table 1

### Real Estate Characteristics NW 27th - 37th Avenue Corridor and Selected Industrial Areas

Characteristic	NW 27th- 37th Avenue Corridor	West Airport *	Hialeah**
Existing Industrial Area (SqFt)	22,720,284	232,112,220	30,289,034
Occupied Industrial Area	21,235,594	213,144,199	26,665,678
- Percent Occupied	93%	92%	88%
Vacant Industrial Area (SqFt)	1,484,690	18,968,021	3,633,356
- Percent Vacant	7%	8%	12%
Average Lease Rate	\$5.58/SqFt	\$6.94/ SqFt	\$6.21/ SqFt
Average Age of Buildings	47.4 years	37.7 years	38.3 years

\*West Airport is the area immediately west of Miami International Airport, north of SR 836 and south of Okeechobee Road.

\*\*Hialeah is the area following the municipal boundary.

Source: CoStar Group Inc, Miami-Dade County Department of Planning and Zoning, Research Section, February 2011.

In order to understand the potential variation of the above characteristics within the Corridor, a similar analysis was performed for the three sub-areas defined as follows: Sub-Area 1 is north of NW 107<sup>th</sup> Street; Sub-Area 2 is between NW 36<sup>th</sup> Street and NW 107<sup>th</sup> Street; and Sub-Area 3 is south of NW 36<sup>th</sup> Street. Sub-Area 3, the smallest of the three, has the highest occupancy rate at 97 percent, and not surprisingly, the highest lease rate at \$5.99 per square foot. Sub-Area 2 that has the largest building square footage at 13,584,084 also has the oldest buildings that average 51.0 years. The lease rate is the lowest of the sub-areas at \$5.43 per square foot. Sub-Area 3 that includes the marine industrial of the Port of Miami River has the lowest age of structure at 32.7 years and a lease rate of \$5.68 per square foot.

Table 2.

**Real Estate Characteristics**  
**NW 27th - 37th Avenue Corridor Sub-Areas**

Characteristic	Sub-Area 1*	Sub-Area 2**	Sub-Area 3***
Existing Industrial Area (SqFt)	6,954,896	13,584,084	1,560,245
Occupied Industrial Area	6,580,628	12,577,320	1,506,587
- Percent Occupied	94%	93%	97%
Vacant Industrial Area (SqFt)	424,268	1,006,764	53,658
- Percent Vacant	6%	7%	3%
Average Lease Rate	\$5.68/SqFt	\$5.43/ SqFt	\$5.99/ SqFt
Average Age of Buildings	32.7 years	51.0 years	45.8 years

\*Sub-Area 1 is north of NW 107<sup>th</sup> Street

\*\*Sub-Area 2 is between NW 36<sup>th</sup> Street and NW 107<sup>th</sup> Street

\*\*\*Sub-Area 3 is south of NW 36<sup>th</sup> Street

Source: CoStar Group Inc, Miami-Dade County Department of Planning and Zoning, Research Section, February 2011.

### Industrial Business Data Analysis

The following section examines the types of businesses existing within in the boundaries of NW 27<sup>th</sup>-37<sup>th</sup> Avenue Corridor. The analysis uses data from the *InfoUSA* business survey to assess the types of economic activities taking place in the Corridor during the first six months of 2010. The survey data allows for the specification of 1,674 establishments located within the Corridor by type of business, based on the North American Industry Classification System (NAICS). Highlights of economic characteristics and industrial use patterns are provided for two major types of business establishments, namely industrial and non-industrial businesses.

### Industrial Businesses

The survey shows that 1,088 business entities or 65 percent of all identified businesses in the Corridor are specialized in production, distribution or repair of durable goods, a category commonly referred to as industrial business. All of them are private companies, except for two representing government transportation agencies.

More than one third of the respondents considered themselves a small business (37.2%), seventeen percent identified themselves as medium-size businesses and less than three percent – as a big business. Few, only 3 percent, represent a work at home business.

Most of the businesses are well established, with only 7 percent established within less than one year. However, the industrial businesses in the area have relatively low levels of concentration. Single location businesses accounted for 95 percent of respondents. Branches or subsidiaries of larger industrial businesses represented less than 5 percent of the total. Only three firms list themselves as a headquarter location. Bertram Yacht Inc., a major ship builder and repairer is the only establishment in the Corridor with a foreign parent company ownership.

The vast majority of industrial establishments are tied to the local or domestic market. Import or export activities are occurring at only 195 of all industrial business locations.

Merchant wholesalers in durable goods are the most important industry in the Corridor, with a 24 percent share of all industrial businesses. Establishments in the Repair and maintenance industry rank second, with 13 percent, followed by auto dealers and service providers, and wholesalers of non-durable goods. Heavy manufacturing, construction and building equipment represent less than 2 percent each. Table 3 ranks the industries with one percent or more of the total business establishments in the area.

Table 3.

**Industrial Businesses in NW 27th- 37th Avenue Corridor**

NAICS 3-digit		Number	% of Total Businesses
423	Merchant wholesalers, durable goods	256	23.6%
811	Repair & maintenance	143	13.2%
441	Motor vehicle and parts dealers	115	10.6%
238	Specialty trade contractors	76	7.0%
487	Scenic and Sightseeing Transportation	53	4.9%
484	Truck transportation	45	4.1%
424	Merchant wholesalers, nondurable goods	41	3.8%
332	Fabricated metal product mfg	32	2.9%
337	Furniture & related product mfg	22	2.0%
485	Transit & ground passenger transportation	20	1.8%
333	Machinery mfg	18	1.7%
237	Heavy and civil engineering construction	18	1.7%
336	Transportation equipment mfg	17	1.6%
236	Construction of buildings	17	1.6%
444	Building material and garden equipment and supplies dealers	14	1.3%
325	Chemical mfg	14	1.3%
517	Telecommunications	13	1.2%
311	Food mfg	13	1.2%
323	Printing & related support activities	12	1.1%
493	Warehousing & storage	11	1.0%
339	Miscellaneous mfg	11	1.0%
326	Plastics & rubber products mfg	11	1.0%
314	Textile product mills	11	1.0%

Note: Industries representing less than 1 percent of total business establishments are excluded.

Source: InfoUSA Business Survey as of May 28, 2010, Miami-Dade County Department of Planning and Zoning, Research Section, 2011.



Table 4.

**Industrial Users by Size of Employment**

Employment Size	% of Industrial Firms
1-4	55.1%
5-9	16.1%
10-19	11.4%
20-49	10.8%
50-99	3.8%
100-249	2.2%
250-499	0.3%
500-999	0.2%
(blank)	0.1%
1000-4999	0.1%

Industrial establishments in the Corridor are predominantly small employers. More than half of them have less than 5 employees.

In contrast, firms with more than 50 employees represent less than 7 percent of the total.

In nearly 52 percent of the industrial firms, white-collar workers represented one-half or more of all employees.

Source: InfoUSA Business Survey as of May 28, 2010, Miami-Dade County Department of Planning and Zoning, Research Section, 2011.

Three-fourth of the industrial firms in the Corridor occupy small to medium-sized buildings larger than 2,500 and less than 40,000 square feet. Specifically respondents indicated that their Industrial space needs were primarily for areas with size 2,500 to 9,999 square feet (36 percent of all industrial users) and areas from 10,000 to 39,999 square feet (38 percent of the users). Small-sized spaces are used by one fifth of the businesses. Nearly one-half of industrial users share the location with other tenants (45 percent). Large industrial users are only 7 percent.

Table 5.

**Industrial Space Usage**

Space Use (Sq.Ft.)	% of Industrial Firms
0 - 2,499	19.3%
2,500 - 9,999	36.4%
10,000 - 39,999	37.7%
40,000+	6.5%

Table 6.

**Shared Use of Industrial Space**

Number of Tenants Sharing Location	% of Industrial Users
2 - 4	37.7%
5 - 9	4.1%
10+	2.7%

Source: InfoUSA Business Survey as of May 28, 2010, Miami-Dade County Department of Planning and Zoning, Research Section, 2011.

Of all industrial users, 27 respondents indicated the size of their business is shrinking. (See Table 7-B) They were predominantly small-sized businesses with few employees occupying small facilities or sharing location with many other tenants, including boat builders, automotive dealers and manufacturers. On the other side, only 12 of the industrial users reported growth in the size of their business in the first half of 2010. (See Table 7-A). These are mostly large industrial wholesalers.

Table 7-A.

## Shrinking Industrial Businesses

NAICS 3-Digit	Business Description	Employment Size	Local Sales Volume	Industrial Space Usage (Sq.Ft.)	Number of Tenants Sharing Location
36	BOAT BUILDING	10-19	\$2.5-5 MILLION	10,000 - 39,999	5
441	BOAT DEALERS	10-19	\$5-10 MILLION	2,500 - 9,999	1
441	BOAT DEALERS	5-9	\$1-2.5 MILLION	2,500 - 9,999	3
485	LIMOUSINE SVC	10-19	\$1-2.5 MILLION	2,500 - 9,999	2
336	BOAT BUILDING	20-49	\$2.5-5 MILLION	10,000 - 39,999	2
238	STEEL & PRECAST CONCRETE CONTRACTORS	10-19	\$2.5-5 MILLION	2,500 - 9,999	1
488	PACKING & CRATING	1-4	LESS THAN \$500,000	10,000 - 39,999	2
488	MOTOR VEHICLE TOWING	1-4	LESS THAN \$500,000	0 - 2,499	0
423	FURNITURE MERCHANT WHLS	5-9	\$2.5-5 MILLION	10,000 - 39,999	4
238	FINISH CARPENTRY CONTRACTORS	10-19	\$1-2.5 MILLION	10,000 - 39,999	0
332	SHEET METAL WORK MANUFACTURING	10-19	\$1-2.5 MILLION	10,000 - 39,999	2
321	WOOD CONTAINER & PALLET MANUFACTURING	5-9	\$1-2.5 MILLION	10,000 - 39,999	0
423	ALL OTHER DURABLE GOODS MERCHANT WHLS	10-19	\$5-10 MILLION	10,000 - 39,999	2
238	GLASS & GLAZING CONTRACTORS	5-9	\$1-2.5 MILLION	10,000 - 39,999	2
334	BROADCAST & WIRELESS COMMUNICATIONS EQUIP	10-19	\$5-10 MILLION	10,000 - 39,999	4
314	CURTAIN & DRAPERY MILLS	20-49	\$5-10 MILLION	10,000 - 39,999	1
325	PAINT & COATING MANUFACTURING	10-19	\$5-10 MILLION	2,500 - 9,999	1
336	ALL OTHER MOTOR VEHICLE PARTS MANUFACTURING	50-99	\$20-50 MILLION	40,000+	3
425	WHOLESALE TRADE AGENTS & BROKERS	10-19	\$5-10 MILLION	2,500 - 9,999	3
238	PAINT & WALL COVERING CONTRACTORS	1-4	LESS THAN \$500,000	2,500 - 9,999	25
484	OTHER SPECIALIZED TRUCKING LONG-DISTANCE	1-4	\$1-2.5 MILLION	2,500 - 9,999	25
484	GENERAL FREIGHT TRUCKING LOCAL	5-9	\$500,000-1 MILLION	10,000 - 39,999	0
333	OTHER COMMERCIAL & SVC MACHINERY MANUFACTURING	5-9	\$2.5-5 MILLION	2,500 - 9,999	2
325	INDUSTRIAL GAS MANUFACTURING	1-4	\$2.5-5 MILLION	10,000 - 39,999	0
321	OTHER MILLWORK INCLUDING FLOORING	5-9	\$1-2.5 MILLION	10,000 - 39,999	0
488	FREIGHT TRANSPORTATION ARRANGEMENT	10-19	\$1-2.5 MILLION	2,500 - 9,999	2
811	GENERAL AUTOMOTIVE REPAIR	1-4	LESS THAN \$500,000	0 - 2,499	1

Source: InfoUSA Business Survey as of May 28, 2010, Miami-Dade County Department of Planning and Zoning, Research Section, 2011.

Table 7-B.

**Growing Industrial Businesses**

NAICS 3-Digit	Business Description	Employment Size	Local Sales Volume	Industrial Space Usage (Sq.Ft.)	Computers in Use
423	RECYCLABLE MATERIAL MERCHANT WHLS	20-49	\$10-20 MILLION	10,000 - 39,999	2 - 9 PCs
311	ANIMAL EXCEPT POULTRY SLAUGHTERING	10-19	\$5-10 MILLION	10,000 - 39,999	2 - 9 PCs
336	MOTOR VEHICLE BODY MANUFACTURING	10-19	\$2.5-5 MILLION	10,000 - 39,999	2 - 9 PCs
484	GENERAL FREIGHT TRUCKING LOCAL	20-49	\$2.5-5 MILLION	10,000 - 39,999	2 - 9 PCs
424	GENERAL LINE GROCERY MERCHANT WHLS	20-49	\$20-50 MILLION	10,000 - 39,999	2 - 9 PCs
337	MATTRESS MANUFACTURING	20-49	\$5-10 MILLION	40,000+	2 - 9 PCs
423	ALL OTHER DURABLE GOODS MERCHANT WHLS	20-49	\$20-50 MILLION	40,000+	10 - 29 PCs
238	PLUMBING & HVAC CONTRACTORS	20-49	\$2.5-5 MILLION \$50-100	2,500 - 9,999	2 - 9 PCs
326	ALL OTHER RUBBER PROD MANUFACTURING	1000-4999	MILLION	40,000+	n/a
441	AUTOMOTIVE PARTS & ACCESSORIES STORES	100-249	\$10-20 MILLION \$100-500	40,000+	n/a
424	PACKAGED FROZEN FOOD MERCHANT WHLS	100-249	MILLION	40,000+	n/a
221	OTHER ELECTRIC POWER GENERATION	20-49	\$20-50 MILLION	10,000 - 39,999	2 - 9 PCs

Source: InfoUSA Business Survey as of May 28, 2010, Miami-Dade County Department of Planning and Zoning, Research Section, 2011.

**Obstacles to Development**

While the corridor offers industrial space for varied uses and is located proximate to several drivers of our local economy, it nevertheless is strapped with some obstacles to further development, namely a lack of infrastructure necessary to support industrial expansion. Specifically, as is seen in Map 4, the industrial areas within the corridor do not have needed water and sewer lines need to support development. The first panel of the map shows the existing land use, the second panel indicates the extent of water lines in the corridor, while the third panel displays the situation in terms of sewer infrastructure.

In order to make the corridor more attractive to a broader variety of industrial uses, an effort should be made to enhance security by improving lighting and police presence in the area. At the same time, it is important to enforce current zoning regulations and provide suitable landscaping where appropriate

**Economic Incentives to Corridor Businesses**

The primary incentives are those related to the Enterprise Zone and Neighborhood Revitalization Strategic Areas (NRSA), (See Map 5). There are two NRSA that include portions of the corridor; they are Melrose and Model City, The Melrose NRSA is inclusive of the Port of Miami River sub-area, while the Model City NRSA includes the area from SR 112 to NW 79<sup>th</sup> Street. One of the eligible activities within the NRSA is the provision of infrastructure to support economic development. The other incentive program that corridor businesses are eligible for is the Enterprise Zone Program. Fortunately, the industrial area within the corridor is fully within the State Enterprise Zone boundaries. Incentives include: Job Tax Credit (on Sales Tax), Jobs Tax Credit (on Corporate Income Tax), Business Equipment Sales Tax Refund, Building Materials Sales Tax Refund, and Sales Tax Exemption for Electrical Energy.

Insert Map 4. Water & Sewer Infrastructure in the Study Corridor, separately.



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