

### PROJECT PURPOSE

The Miami Valley Industrial Development Assessment, as part of Going Places: An Integrated Land Use Vision for the Miami Valley Region, is an evaluation of the current status of industrial development in the Miami Valley Region and an attempt to gauge what the future may hold for this sector.

### DATA SOURCES

- Greene, Miami, Montgomery, and Warren counties
- The cities of Carlisle, Franklin, and Springboro
- US Department of Housing and Urban Development
- Gem Real Estate Group
- Ohio-Kentucky-Indiana Regional Council of Governments
- MVRPC

### METHOD

For this study, both spatial and non-spatial data were collected and developed at the parcel, tract, and Traffic Analysis Zone (TAZ) levels. The data are examined geographically, graphically, and in tabular form. For the most part, tabular and graphic analyses occurred at the regional and county levels, while geographic analyses were conducted at both the parcel and TAZ levels. The analyses are both land-based and structure-based.

### CONCLUSIONS

- Industrial development in the Miami Valley Region has been, and is expected to continue to be, on the decline, both in terms of land use and employment.
- Overall, industrial development comprises a very small portion of the Region's developed land.
- Currently, the largest type of industrial development in the Region is Light to Medium Manufacturing and Assembly Plants, followed by Industrial Warehouses and Truck Terminals.
- Montgomery County has the largest amount of industrial land and employment, although Miami County has been the fastest growing county in the Region in terms of industrial development.
- Although the exact number of industrial vacancies is unknown, it is estimated that almost 20% of the Region's industrial gross floor area is vacant.
- In the future, industrial development will most likely play a much different role in our Region than it has in the past.

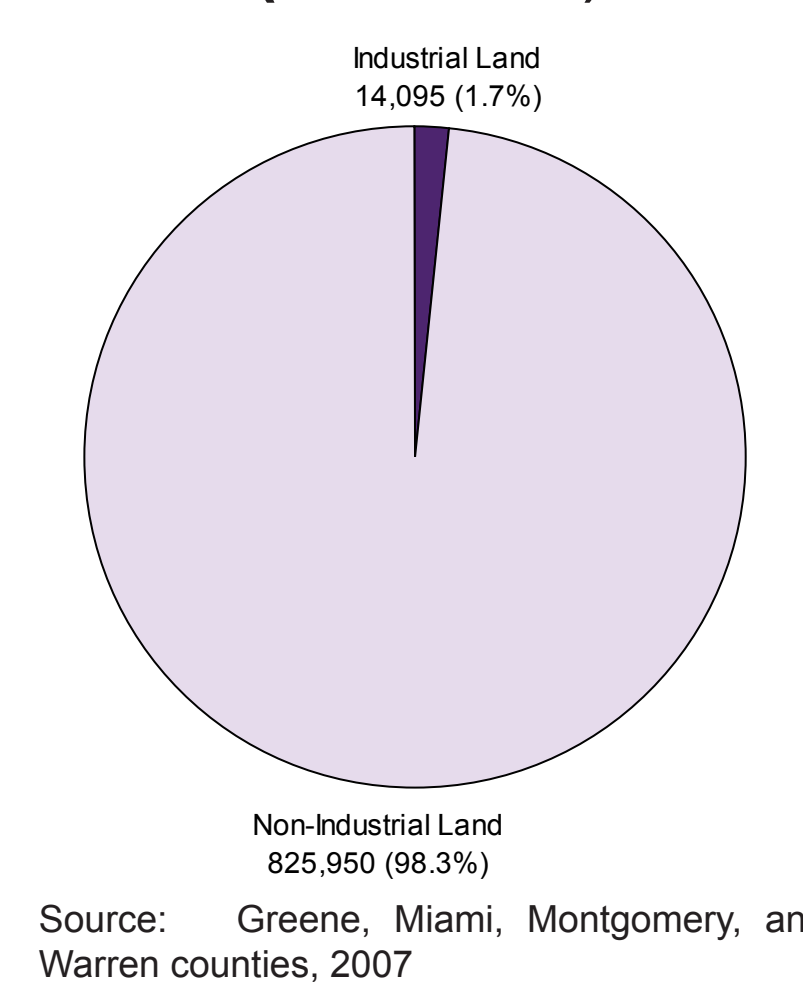
### REGIONAL OVERVIEW

Industrial Land Use, according to the State of Ohio Classification of Real Property, is defined as "the land and improvements to land used for manufacturing, processing, or refining foods and materials, and warehouses used in connection therewith."

Although the Region as a whole gained approximately 2,000 acres of industrial land between 1975 and 2000, the percent share of industrial land decreased during this period. In 1975, 7% of the Region's developed land was industrial, while in 2000 it was only 5%.

Overall, in 2007, industrial development comprised less than 2% of the Region's developed land. For the most part this land is concentrated in the Region's major cities and along its major highways, especially along I-75.

#### Regional Industrial Land Share for 2007 (in acres)



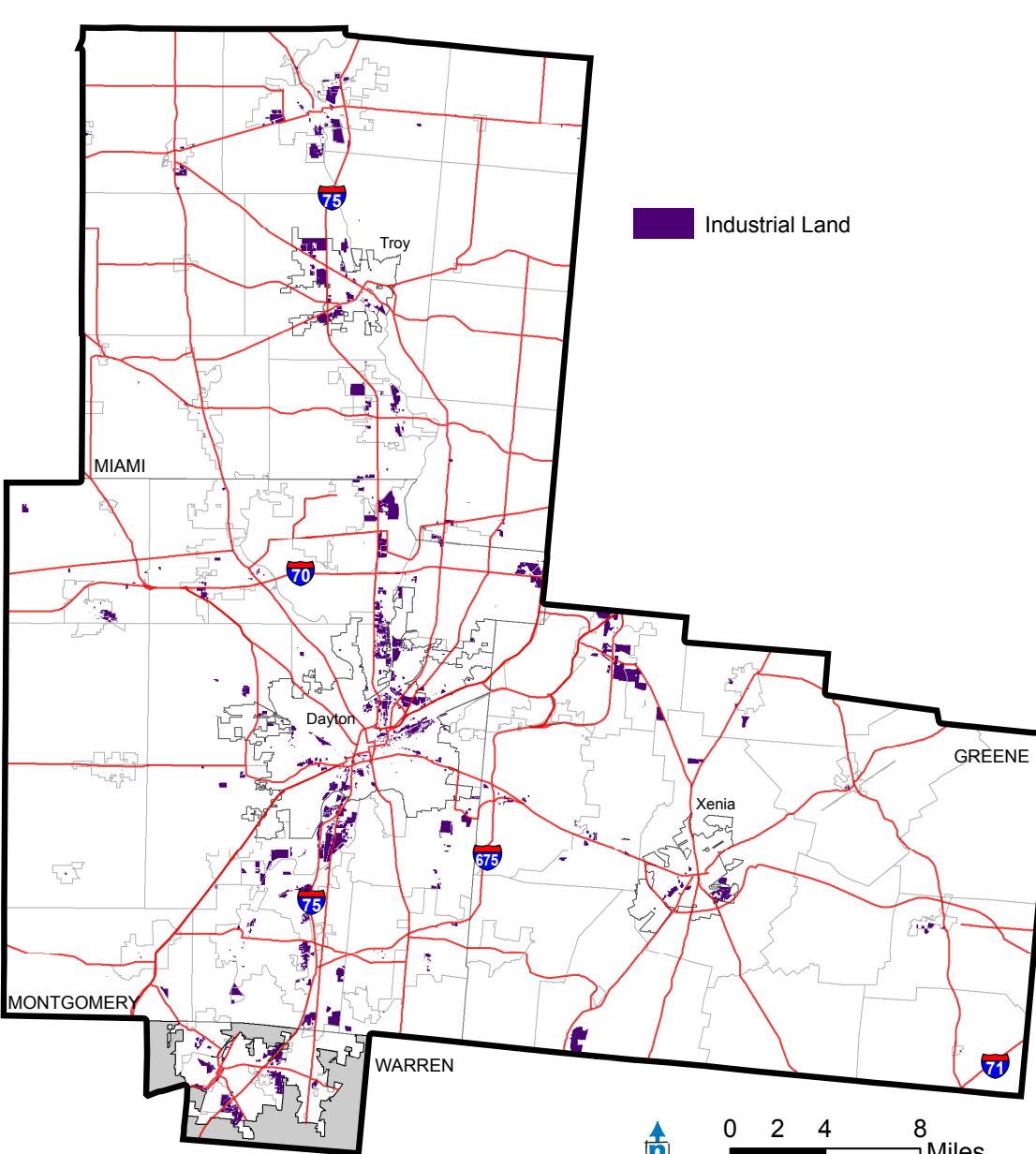
Source: Greene, Miami, Montgomery, and Warren counties, 2007

#### HISTORIC LAND USE (IN ACRES) FOR 1975 AND 2000

Region	Industrial Land			Non-Industrial Developed Land		
	1975	2000	% Change	1975	2000	% Change
Greene	2,344	2,094	-10.7%	26,188	53,500	104.3%
Miami	1,411	2,565	81.8%	9,893	22,694	129.4%
Montgomery	4,796	5,769	20.3%	66,152	91,913	38.9%

Source: MVRPC  
Note: Warren County data are not shown because they are not available

#### INDUSTRIAL LAND IN THE MIAMI VALLEY REGION IN 2007



Source: Greene, Miami, Montgomery, and Warren counties, 2007

#### REGIONAL ESTIMATE OF VACANT INDUSTRIAL SPACE (IN SQUARE FEET)

	Total GFA	Total Vacant GFA	Percent Vacant
Gem Survey	18,983,087	3,655,962	19.3%
MVRPC Estimate	73,689,637	14,191,923	19.3%

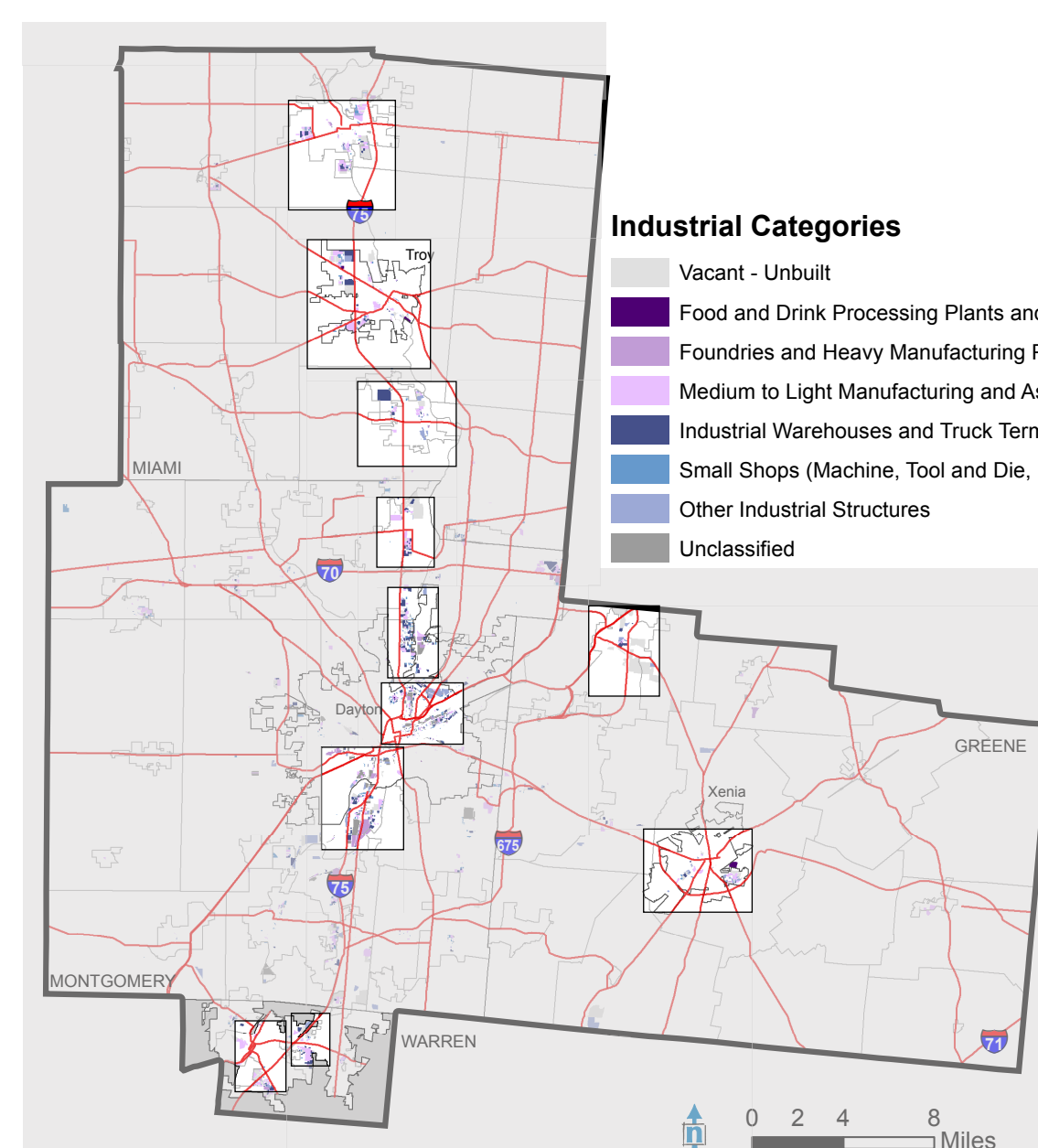
Source: Gem Real Estate Group, 2007; Greene, Miami, Montgomery, and Warren counties, 2007; Cities of Carlisle, Franklin, and Springboro

### MARKET ANALYSIS

In order to better analyze the distribution of industrial development throughout the Region, eleven industrial markets have been identified. The industrial land use in each market has been divided into land use categories and examined both by land and gross floor area (GFA).

Within each of the markets, the percentage of land or GFA per category illustrates that very few markets are dominated by one type of development. In terms of GFA, there is a definite bias towards the Light to Medium Manufacturing and Assembly Plants category. The three markets that have more than 60% (Montgomery County/North I-75, North Miami County, South Dayton/Moraine) of their GFA in one category all have the most square footage in the Light to Medium Manufacturing and Assembly Plants category.

#### INDUSTRIAL MARKET CLUSTERS



The two markets that have more than 50% of their industrial land in one category (Northeast Greene County and Montgomery County/North I-75) both have the most acreage in the Vacant - Unbuilt category.

#### INDUSTRIAL GFA BY MARKET AND CATEGORY (IN SQUARE FEET) FOR 2007

Market	Food and Drink Processing Plants and Storage	Foundries and Heavy Manufacturing Plants	Light to Medium Manufacturing and Assembly Plants	Industrial Warehouses and Truck Terminals	Small shops	Other Industrial Structures	Unclassified
NE Greene County	0.0 (0.0%)	48,705 (6.6%)	355,129 (48.2%)	286,986 (39.0%)	0.0 (0.0%)	45,419 (6.2%)	0.0 (0.0%)
Franklin	0.0 (0.0%)	52,920 (9.3%)	312,849 (55.0%)	19,850 (3.5%)	95,908 (16.9%)	87,203 (15.3%)	0.0 (0.0%)
Montgomery County/North I-75	0.0 (0.0%)	0.0 (0.0%)	2,395,955 (74.7%)	617,160 (19.2%)	116,486 (3.6%)	17,077 (0.5%)	61,562 (1.9%)
North Dayton	0.0 (0.0%)	832,993 (8.6%)	1,792,181 (24.2%)	2,906,392 (39.3%)	730,592 (9.9%)	17,194 (0.2%)	1,323,149 (17.9%)
East Dayton	131,077 (1.0%)	817,807 (6.0%)	2,890,792 (19.6%)	2,200,000 (16.0%)	1,523,889 (11.1%)	404,548 (3.0%)	5,955,938 (43.4%)
N. Miami County	2,688 (0.1%)	338,685 (8.0%)	2,661,776 (62.7%)	578,503 (13.6%)	395,265 (9.3%)	267,847 (6.3%)	0.0 (0.0%)
South Dayton/Moraine	4,373 (0.0%)	6,222,317 (33.0%)	1,994,556 (10.6%)	3,484,581 (18.5%)	802,403 (4.3%)	769,701 (4.1%)	5,576,526 (29.6%)
Springboro	8,080 (1.3%)	0.0 (0.0%)	229,068 (35.9%)	371,781 (58.3%)	28,690 (4.5%)	0.0 (0.0%)	0.0 (0.0%)
S. Miami County	0.0 (0.0%)	0.0 (0.0%)	1,043,338 (63.6%)	129,884 (7.9%)	195,413 (11.9%)	270,961 (16.5%)	0.0 (0.0%)
Central Miami County	80,295 (1.9%)	0.0 (0.0%)	1,671,190 (39.7%)	1,781,179 (42.3%)	513,199 (12.2%)	160,599 (3.6%)	0.0 (0.0%)
Central Greene County	76,187 (2.6%)	58,949 (2.6%)	782,930 (34.6%)	758,076 (33.5%)	46,924 (2.1%)	537,542 (23.8%)	0.0 (0.0%)

Source: Greene, Miami, Montgomery, and Warren counties, 2007; cities of Carlisle, Franklin, and Springboro, 2007

#### INDUSTRIAL LAND BY MARKET AND CATEGORY (IN ACRES) FOR 2007

Market	Food and Drink Processing Plants and Storage	Foundries and Heavy Manufacturing Plants	Light to Medium Manufacturing and Assembly Plants	Industrial Warehouses and Truck Terminals	Small shops	Other Industrial Structures	Unclassified	Vacant - Unbuilt
NE Greene County	0.0 (0.0%)	3.7 (0.3%)	11.0 (0.9%)	44.0 (3.7%)	0.0 (0.0%)	66.7 (5.6%)	0.0 (0.0%)	1,063.6 (89.5%)
Franklin	0.0 (0.0%)	24.7 (4.8%)	208.0 (40.5%)	22.1 (4.3%)	18.9 (3.7%)	0.2 (0.1%)	207.7 (40.5%)	0.0 (0.0%)
Montgomery County/North I-75	0.0 (0.0%)	0.0 (0.0%)	189.1 (25.1%)	107.5 (14.3%)	31.2 (4.1%)	14.1 (1.9%)	25.3 (3.4%)	386.0 (51.2%)
North Dayton	0.0 (0.0%)	60.6 (7.0%)	198.3 (22.9%)	252.1 (29.1%)	83.1 (9.6%)	56.5 (6.5%)	163.4 (18.9%)	52.8 (6.1%)
East Dayton	11.4 (1.0%)	45.1 (3.9%)	186.9 (16.1%)	204.0 (17.6%)	111.2 (9.6%)	114.2 (9.9%)	457.5 (39.5%)	29.6 (2.6%)
N. Miami County	1.1 (0.1%)	52.3 (5.1%)	433.9 (42.6%)	82.5 (8.1%)	89.4 (8.8%)	0.0 (0.0%)	314.7 (30.9%)	0.0 (0.0%)
South Dayton/Moraine	0.1 (0.0%)	395.2 (26.1%)	218.5 (14.4%)	183.6 (12.1%)	69.4 (4.6%)	89.4 (5.9%)	404.0 (26.7%)	155.7 (10.3%)
Springboro	1.6 (0.3%)	0.0 (0.0%)	170.8 (37.1%)	88.7 (19.2%)	21.0 (4.6%)	43.3 (9.4%)	0.0 (0.0%)	135.0 (29.4%)
S. Miami County	1.6 (0.3%)	0.0 (0.0%)	101.2 (19.7%)	194.7 (37.9%)	22.6 (4.4%)	108.5 (21.1%)	0.0 (0.0%)	85.7 (16.7%)
Central Miami County	28.8 (2.7%)	0.0 (0.0%)	348.4 (31.2%)	210.4 (18.9%)	66.1 (5.9%)	90.7 (8.1%)	1.8 (0.2%)	368.7 (33.0%)
Central Greene County	51.4 (13.2%)	4.5 (1.2%)	109.9 (28.1%)	19.9 (5.1%)	10.1 (2.6%)	73.5 (18.8%)	0.0 (0.0%)	121.4 (31.1%)

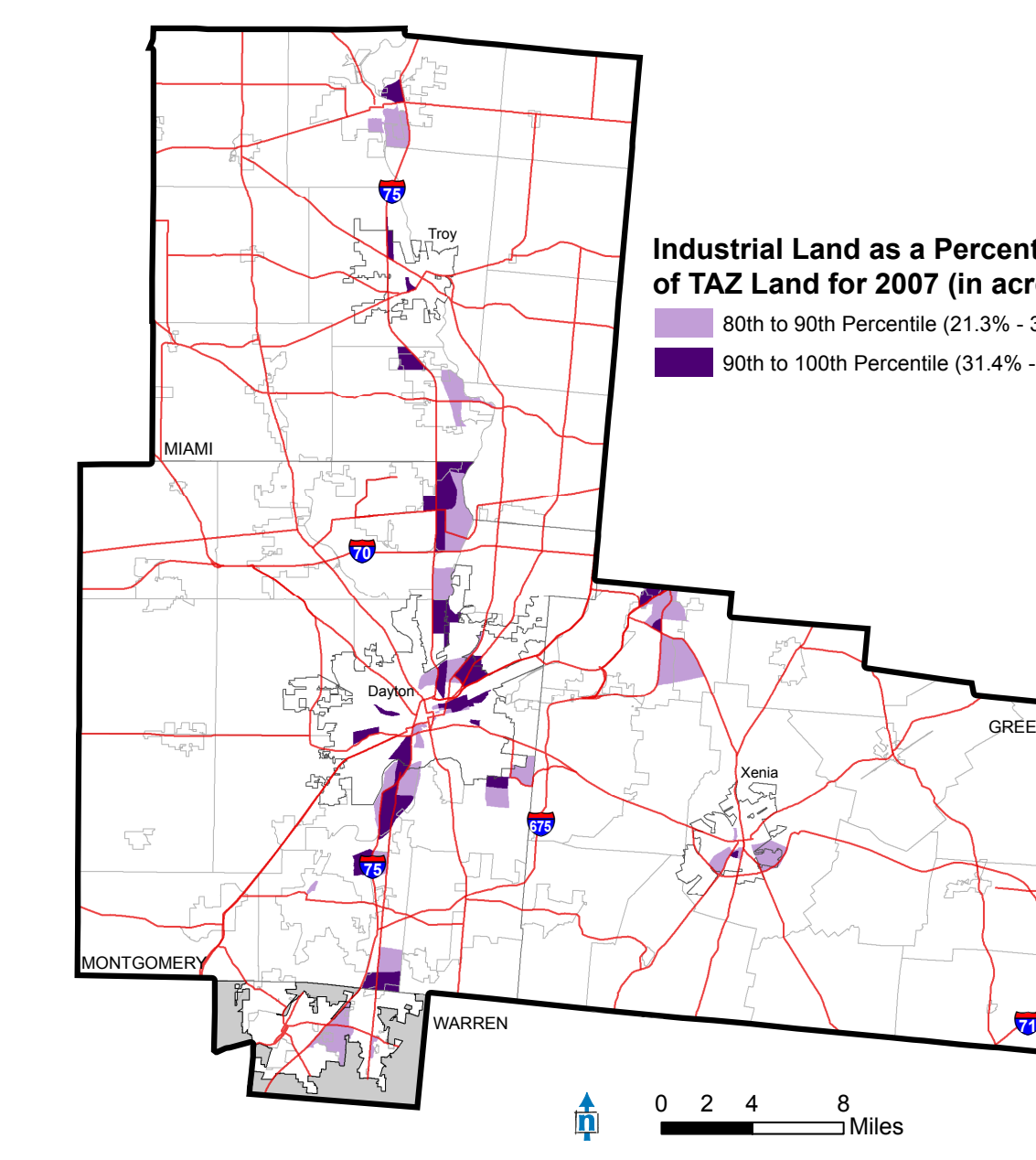
Source: Greene, Miami, Montgomery, and Warren counties, 2007

### LAND- AND BUILDING-BASED ANALYSES

In terms of land, the largest industrial development category for the Region is Vacant - Unbuilt (28.1%), consisting of properties that have been classified as industrial but do not contain structures. The second largest category is Light to Medium Manufacturing and Assembly Plants with 24.5% of the Region's industrial land.

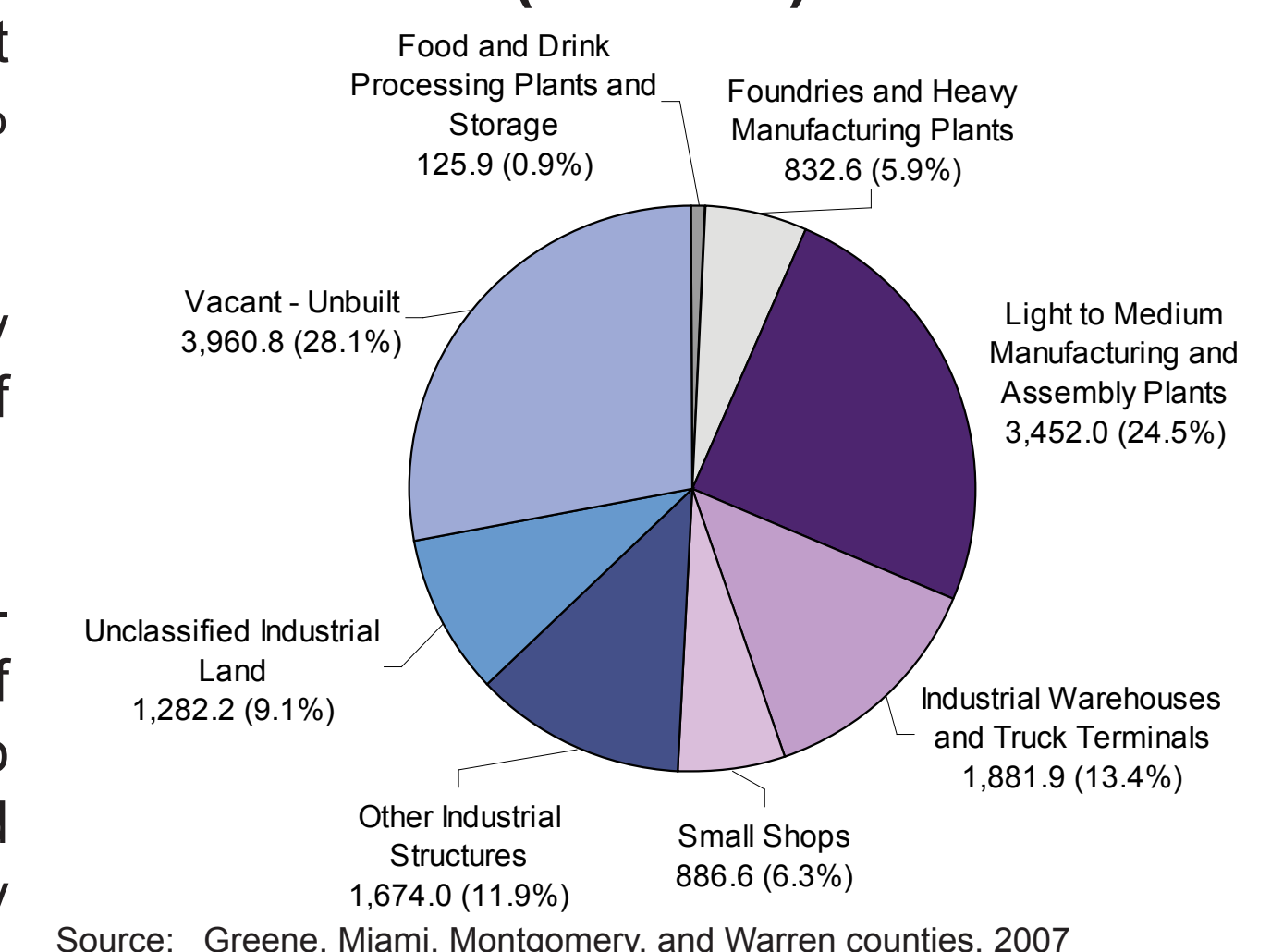
The areas with the largest concentrations of industrial land are mostly located along I-75. Other locations include just southeast of the City of Dayton, southern Xenia, and near Wright Patterson Air Force Base.

#### INDUSTRIAL DEVELOPMENT CONCENTRATIONS FOR 2007



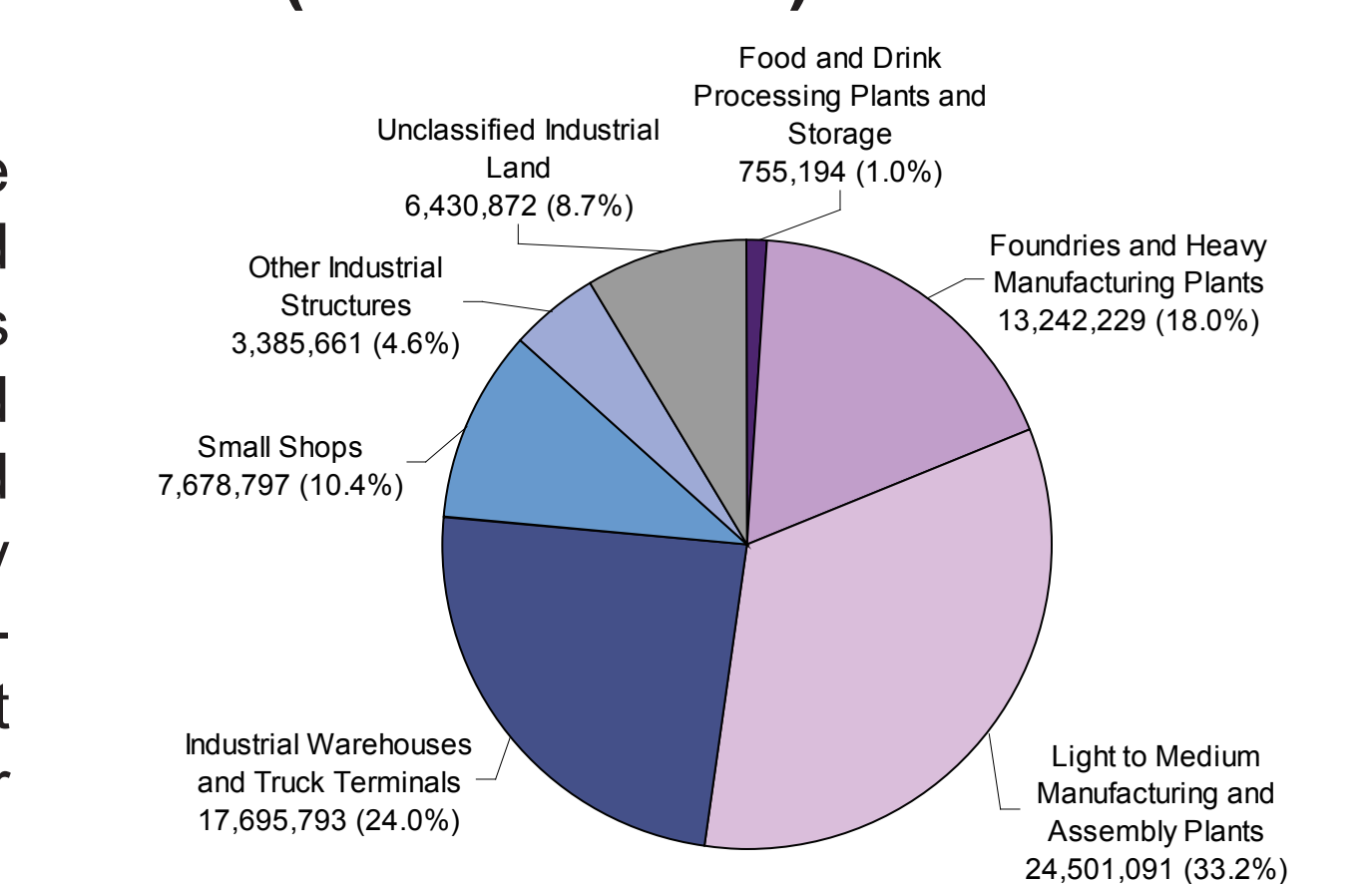
Source: Greene, Miami, Montgomery, and Warren counties, 2007

#### INDUSTRIAL LAND BY CATEGORY (IN ACRES) FOR 2007



Source: Greene, Miami, Montgomery, and Warren counties, 2007

#### INDUSTRIAL GFA BY CATEGORY (IN SQUARE FEET) FOR 2007



Source: Greene, Miami, Montgomery, and Warren counties, 2007; cities of Carlisle, Franklin, and Springboro, 2007

### EMPLOYMENT

#### MANUFACTURING EMPLOYMENT FROM 1980 TO 2005

	1980	1990	2000	2005
Greene	3,852	4,248	5,343	5,384
Miami	14,390	13,700	15,323	14,727
Montgomery	65,461	59,865	59,165	52,454
Warren*			3,287	3,271
Regional Total**	83,703	77,813	79,831	72,565

Source: MVRPC, 2008; Ohio-Kentucky-Indiana Council of Governments, 2008  
Note: \* No data available for Carlisle, Franklin, and Springboro for 1980 and 1990  
\*\* The 2000 regional total does not include data from Warren County

#### UPPER LEVEL MANUFACTURING EMPLOYMENT PROJECTIONS

	2010	2020	2030	2040
Greene	4,055	4,157	4,189	4,125
Miami	11,318	11,368	11,142	10,742
Montgomery	40,553	39,390	37,900	34,890
Warren*	3,741	4,449	5,331	6,097
Regional Total	59,667	59,363	58,562	55,854

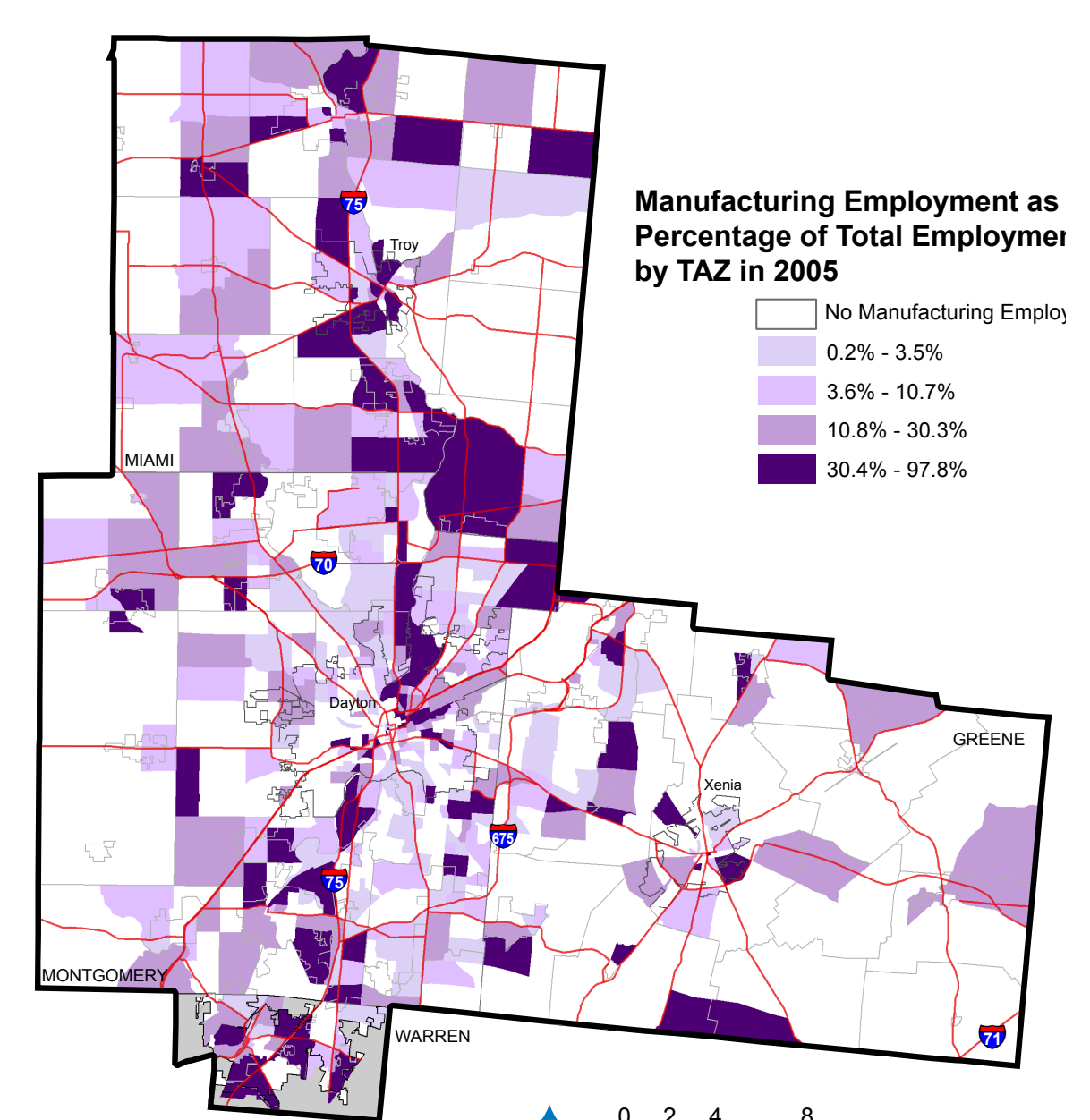
Source: MVRPC, 2008; Ohio-Kentucky-Indiana Council of Governments, 2008  
Note: \* Warren County includes only the cities of Carlisle, Franklin, and Springboro

#### LOWER LEVEL MANUFACTURING EMPLOYMENT PROJECTIONS

	2010	2020	2030	2040
Greene	4,329	4,057	3,845	3,642
Miami	12,084	11,095	10,228	9,484
Montgomery	43,295	38,446	34,789	30,804
Warren*	3,741	4,449	5,331	6,097
Regional Total	63,448	58,046	54,193	50,027

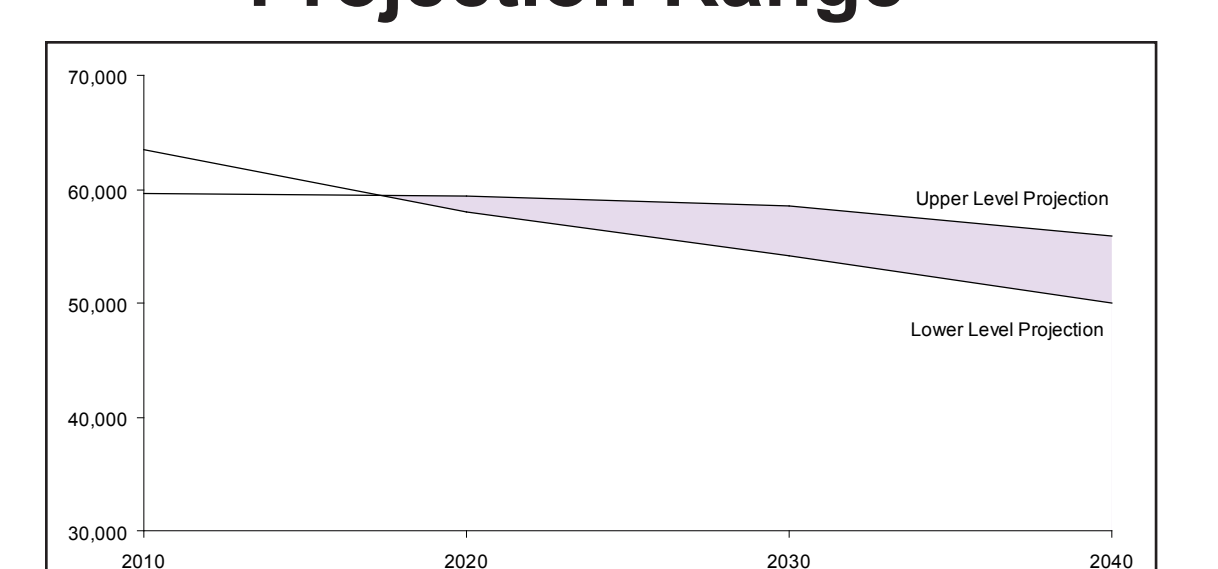
Source: MVRPC, 2008; Ohio-Kentucky-Indiana Council of Governments, 2008  
Note: \* Warren County includes only the cities of Carlisle, Franklin, and Springboro

#### MANUFACTURING EMPLOYMENT CONCENTRATIONS FOR 2005



Source: MVRPC, 2008; Ohio-Kentucky-Indiana Council of Governments, 2008

#### Manufacturing Employment Projection Range



Regional manufacturing employment has fluctuated since 1980, although it has generally had a downward trend.

Manufacturing employment in 2005 was scattered throughout the Region, although the largest concentrations were located in Miami and Montgomery counties.

MVRPC staff developed upper and lower level projections in order to provide insight as to what the manufacturing employment range could be in the future. In both cases, manufacturing employment is projected to decrease between 2010 and 2040.

In the upper level projection, it is expected that there will be a regional decrease of almost 4,000 employees. Greene County and northern Warren County both are expected to increase during the projection period, but the decreases in Miami and Montgomery counties bring the 2040 total down from its 2010 level.

In the lower level projection, the only county not expected to register a decrease is northern Warren County.