

Knoxville-Oak Ridge Innovation Valley Region: Industrial Land Inventory and Comparative Study - Report of Results

PREPARED FOR:

KNOXVILLE CHAMBER

THE DEVELOPMENT CORPORATION OF KNOX COUNTY



JULY 15, 2014



About Comerford Consulting Group

- Professional site selection & economic development consulting services
- Over 13 years professional site selection experience
- Specialist in manufacturing, technical, distribution, back office location strategies -- ***Objective: Identify the optimal location based on client specific operating requirements***
- Experience with various industry sectors including: Aerospace & Defense, Aviation, Broadcasting, Consumer Products, Food & Beverage, Pharmaceuticals, Nutraceuticals & Ingredients, General Manufacturing
- Lead the consulting team in the development of the Select Tennessee Certified Sites program
- Member of the Site Selectors Guild; Affiliation with Competitive Ready Group; Aligned with BLS & Co.



Our Common Goal

Site Selectors and Economic Development Professionals share a common goal...

To be associated with good communities:

- ❖ Economically sustainable
- ❖ Create wealth
- ❖ Good quality of life

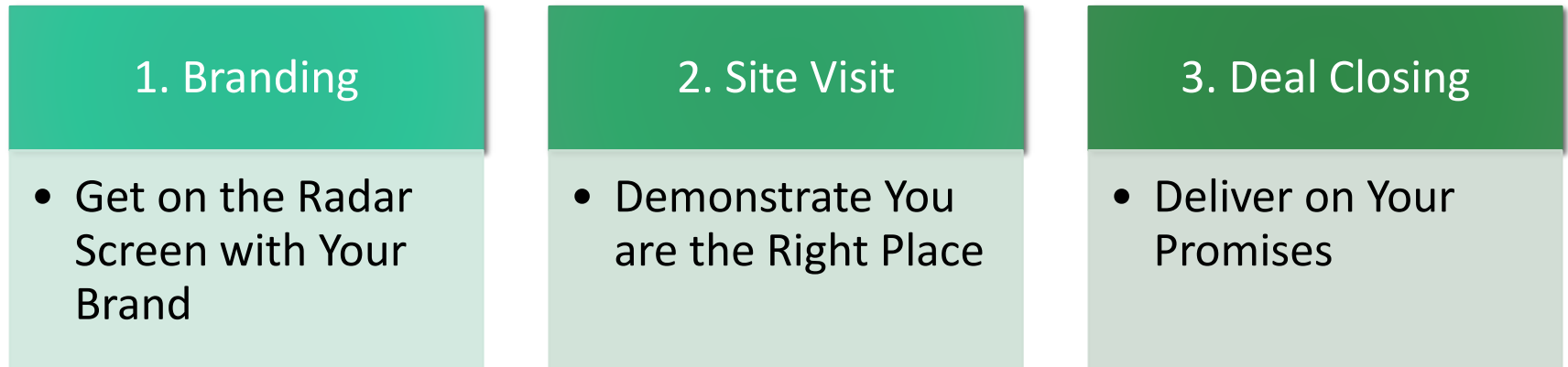


Location Selection Process

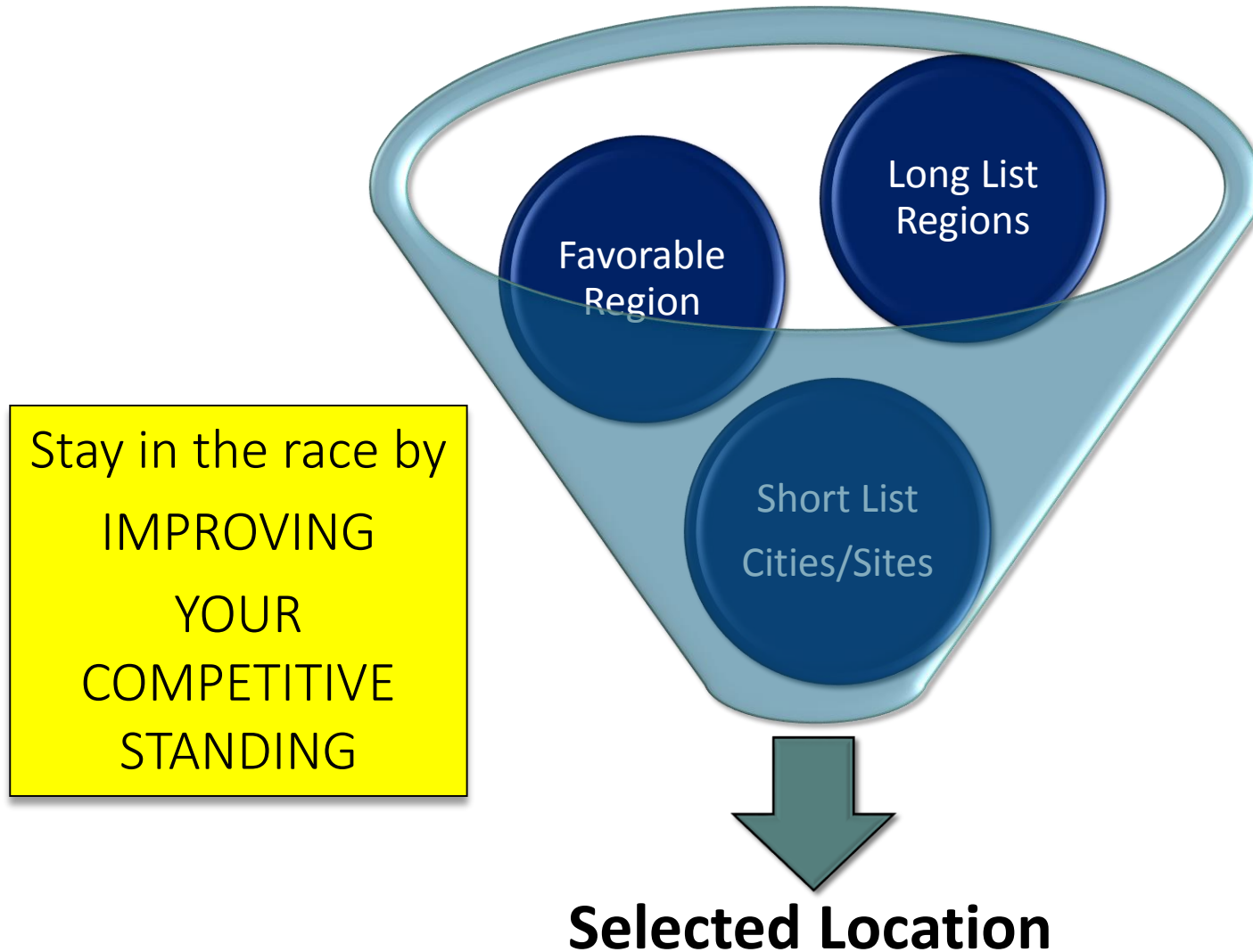
Process Timeline



Three places communities influence projects.



Location Selection is a Process of Elimination



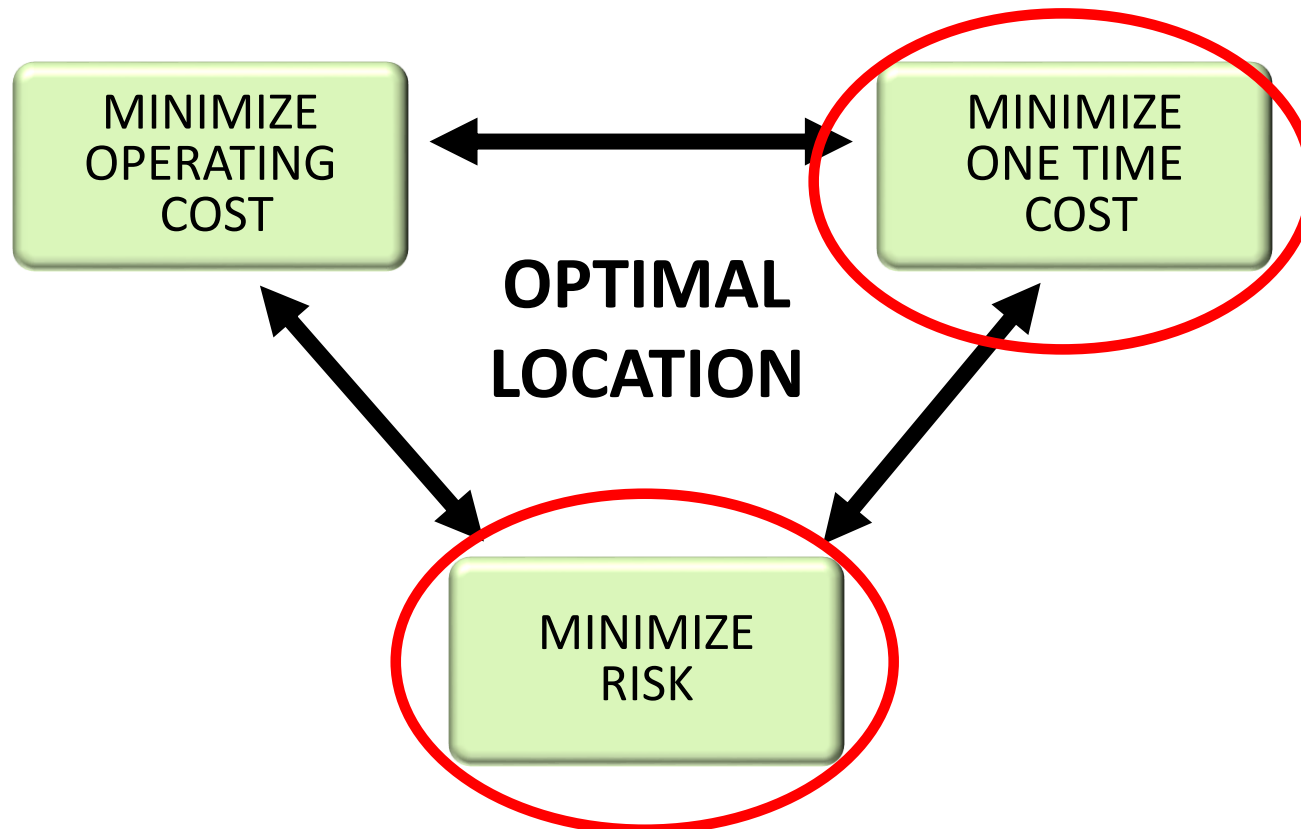
What Is Needed to Compete?

Communities MUST be prepared and ready for new investment BEFORE it happens with:

1. “Ready to Go” Sites and Buildings
2. “Ready to Work” Labor Force
3. Appropriate Utility Infrastructure
4. Support for Green Business Practices
5. Creative and Flexible Incentives (Community Support)
6. Professional Presentation & Documentation

Ultimate Goal: Balancing Risk

The goal of any location project is to find the location that best balances competing interests...



...a “ready to go” site helps to achieve two of these factors.

Agenda

Industrial Land Inventory and Comparative Study:

1. Project Purpose

2. Project Methodology

- Step 1 – Set Scoring Criteria
- Step 2 – Benchmark Knoxville Region
- Step 3 – Competitor Analysis
- Step 4 - Comparison

3. Findings and Conclusions

Project Purpose and Goals

To assist the Knoxville-Oak Ridge Innovation Valley Region, its member counties, elected officials, and other stakeholders to:

- better understand what it means to be “business ready”
- better understand where the region fares compared to competitor regions when it comes to available industrial sites
- receive specific feedback to marketability of available industrial sites in the region in order to strengthen competitiveness for business growth and expansion

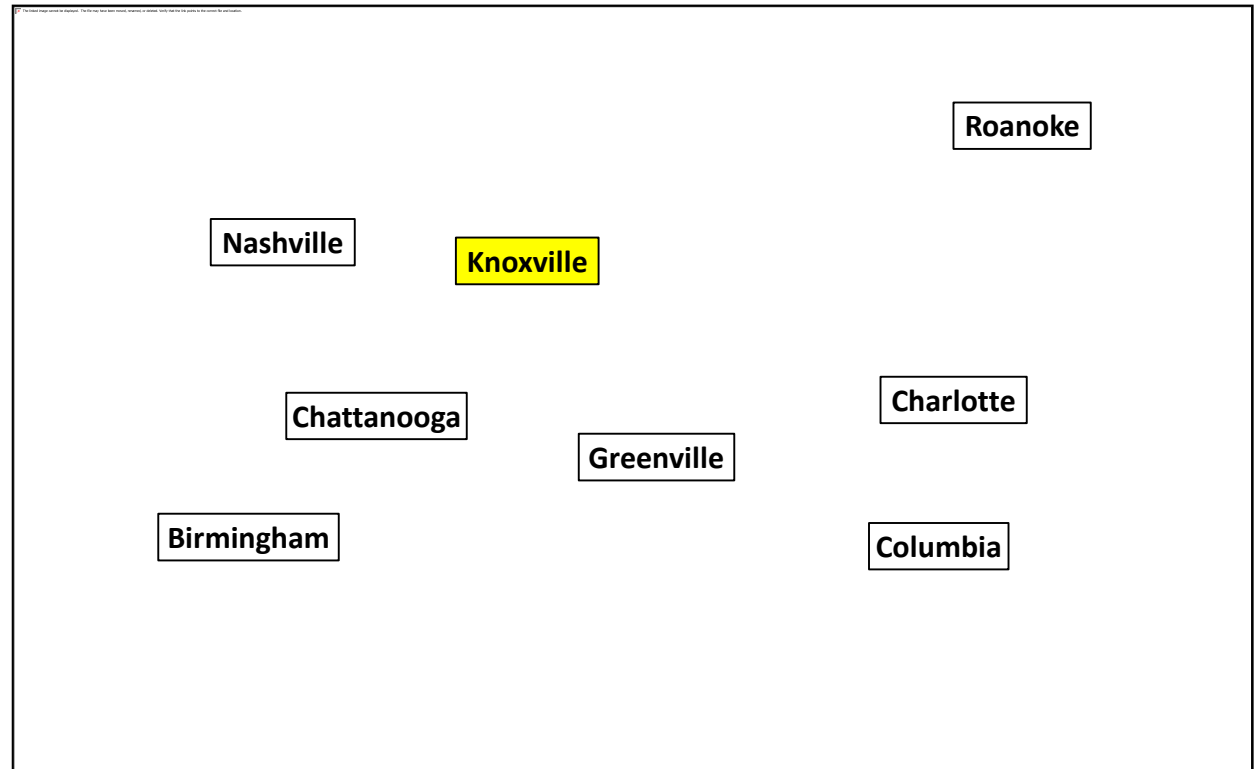
Knoxville – Oak Ridge Innovation Valley Region



Competitor Regions Evaluated

Competitor Regions:

- Birmingham, AL
- Chattanooga, TN
- Columbia, SC
- Charlotte, NC
- Nashville, TN
- Greenville, SC
- Roanoke, VA



Project Methodology

- ❑ Step 1: Define Scoring Criteria
- ❑ Step 2: Inventory Knoxville Region Sites & Benchmark Scoring
- ❑ Step 3: Competitor Region Inventory & Scoring
- ❑ Step 4: Findings & Conclusions

1. Define Scoring Criteria

Step 1: Define Scoring Criteria

Site Scoring Principles:

- Measures site readiness on a relatively broad scale
- Level of readiness to accommodate most manufacturing operations
 - Note: Some operations may have additional or more stringent requirements (i.e. Food Processing)
- Max score represents a best in class type of site in any community

Minimum Site Criteria

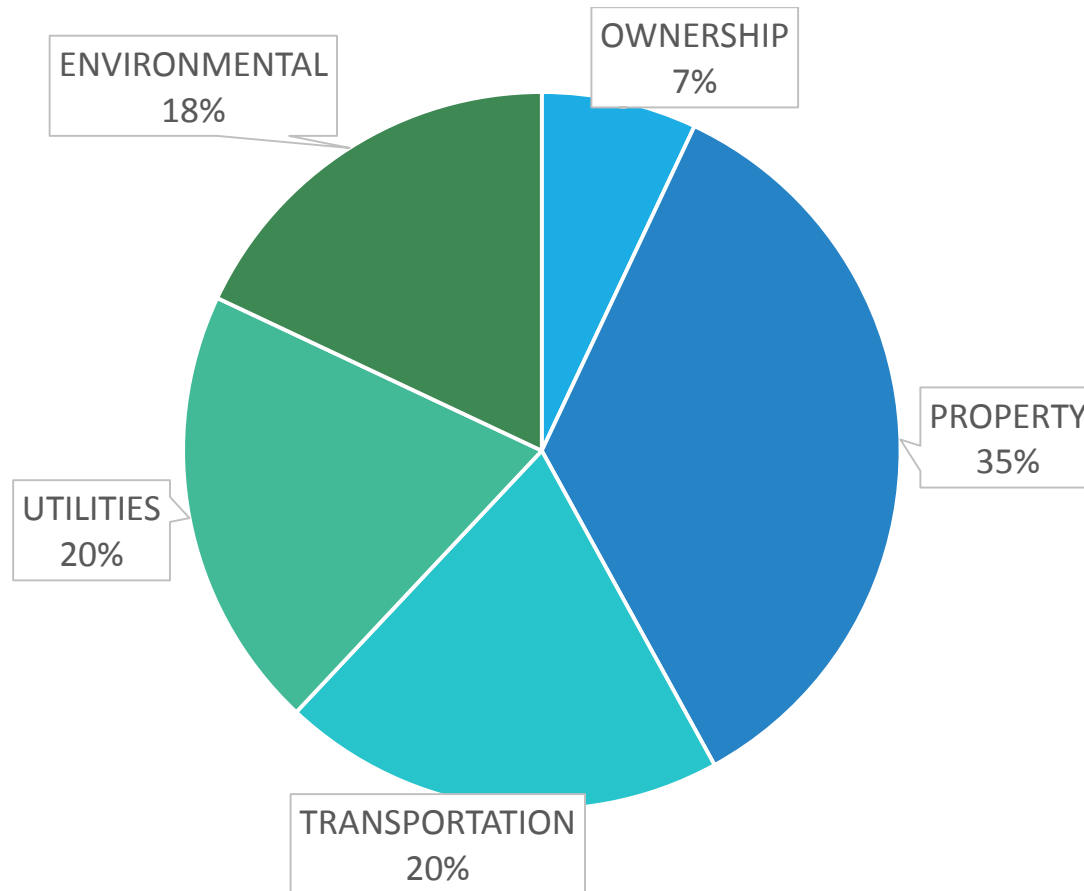
- 10 or more developable acres
- Appropriate zoning that allows for manufacturing use
- Public or private ownership with a confirmed asking price and a willing seller
- Direct road access to site on a truck quality road
- All utilities at the site or a formal plan to extend to the site
- Free of environmental liabilities or with a mitigation plan in hand of 6 months or less
- Developable acreage is out of known 100-year and 500-year floodplain; free of streams, wetlands, and/or floodlands that impact the minimum developable acreage
- Topography for the developable acreage is free of steep slopes (greater than 8%) and is strongly preferred to have the site graded or a site grading plan in place
- Free of known wildlife habitat restrictions and historical or archeological restrictions

Ref#	Category	Criteria	Weight	Cat. Wt.
1	Ownership	Willing Seller	2%	7%
2		Advertised For Sale	2%	
3		Confirmed Asking Price	3%	
4	Property	Site Size	3%	35%
5		Greenfield/Brownfield	2%	
6		Site Setting	4%	
7		Site Condition – Dev Area	5%	
8		Site Condition – Topography	4%	
9		Site Survey	3%	
10		Easements/Impediments	3%	
11		Flood Plain	4%	
12		Zoning	4%	
13		Pad Ready Site	3%	
B1		Certified by 3 rd Party	BONUS	
14	Transportation	Road Serving Site	7%	20%
15		Distance to 4 Lane Hwy	4%	
16		Distance to Interstate	7%	
17		Airport Access	2%	
B2		Site Rail Access	BONUS	
B3		Site Port Access	BONUS	
18	Utilities	Electric	5%	20%
19		Natural Gas	4%	
20		Water	5%	
21		Sewer	4%	
22		Telecommunications	2%	
23	Environmental	Phase 1 Study	4%	18%
24		Hydrologic Studies	4%	
25		Rare, Threatened Species	3%	
26		Archaeological	3%	
27		Geotechnical	4%	
TOTAL			100%	100%

SITE SCORING

- Five Main Categories
- 27 Overall Criteria
- 3 Bonus Criteria
- Score of 1-4 per Criteria
- Weighted Scoring Scale
- Max Score:
 - 364 (no bonus)
 - 396 (with full bonus)

Site Scoring – % of Overall Score by Category



Deal Killers

Eliminated from scoring if any of the following:

- No willing seller
- Not advertised for sale or lease
- No asking price
- Less than 10 developable acres
- Major topography challenges
- Site not zoned for industrial uses
- Developable area within 100/500 year flood plain
- Road not accessible by truck
- Utility services not at the site, no plan for extension
- Environmental issues reported

Scoring Matrix

Evaluation Criteria		Wt	DK	DEAL KILLER = 0	Low Score = 1 Point	Mid-Low Score = 2 Point	Mid-High Score = 3 Point	High Score = 4 Points
Factor	OWNERSHIP							
1	Willing Seller (public or private owner)	2%	X	No willing seller	na	na	na	Site has willing seller
2	Advertised For Sale / Lease	2%	X	Not marketed for sale	na	na	na	Site marketed for sale
3	Confirmed Asking Price	3%		No confirmed asking price	na	na	na	Confirmed asking price available
WEIGHT 7%		7%						
Factor	PROPERTY							
5	Site size	3%		Less than 10 dev acres	na	10-15 developable acres	15-20 developable acres	Greater than 20 developable acres
6	Greenfield vs Brownfield	2%			Brownfield with remediation still in process	na	Brownfield with all required remed complete	Greenfield site
7	Site setting	4%			Mixed surrounding uses including residential	Stand alone site surrounded by ag or land	Not park, but surrounded by industrial uses	Industrial park setting
8	Site Condition - Developable Area	5%			Heavily wooded site	Moderate level of clearing required	Site partially cleared	Site cleared for developable area
9	Site Condition - Topography	4%	X	Major topography challenges	Unknown slope	Slope greater than 5%	Slope less than 5%	Slope less than 3%
10	Site Survey	3%			Site survey not completed	na	na	Site survey completed
11	Easements/Impediments to Development	3%			Major impediments to development	Some Impediments to Development	Minor Impediments to Development	No Impediments to Development
12	Flood Plain	4%	X	Dev area in 100/500 yr flood plain	na	Nondev area within 100 yr flood plain	Nondev area within 500 yr flood plain	No known 100/500 yr flood plain on site
13	Zoning	4%	X	Site not zoned/intended for Industrial	Restricted Zoning	Land Use Plan Intended Use = Industrial	May need minor zoning modifications	Zoned appropriate for Mfg/Distribution
14	Pad Ready Site	3%			No site prep completed	Cleared but no site grading done	Some grading complete	Pad grade ready site
B1	Certified by 3rd Party (BONUS)				na	na	na	Site certified "shovel ready" by third party
WEIGHT 35%		35%						
		Bonus 2%						
TRANSPORTATION								
15	Road serving site	7%		Road not truck accessible	Road requires upgrades / Poor site access	Some road & site access upgrade reqd	Quality road in place / Site limited access	High quality road at site / Site Accessible
16	Distance to 4 Lane Highway	4%			Highway more than 20 miles from site	Highway 10-20 miles from site	Highway 5-10 miles from site	Highway less than 5 miles from site
17	Distance to Interstate	7%			Interstate more than 20 miles from site	Interstate more than 10 miles from site	Interstate 5-10 miles from site	Interstae less than 5 miles from site
18	Airport access	2%			Commercial airport greater than 2 hrs	Comm airport greater than 1 hr	Comm airport greater than 30 mins	Comm airport less than 30 min
B2	Railroad Service (BONUS)				Rail may be possible, Needs further invest	Rail is possible, but no plan	Site can be rail served, plan available	Site is rail served, spur in place
B3	Barge Service (BONUS)				na	na	Site has secondary barge service	Site is directly barge served
WEIGHT 20%		20%						
		Bonus 3%						
UTILITIES								
19	Electric	5%		Service not at site/no plan	na	na	Service not at site but plan avail	Service at the site
20	Natural Gas	4%		Service not at site/no plan	na	na	Service not at site but plan avail	Service at the site
21	Water	5%		Muni service not at site/no plan	na	na	Muni Service not at site but plan avail	Municipal Service at the site
22	Sewer	4%		Muni service not at site/no plan	na	na	Muni Service not at site but plan avail	Municipal Service at the site
23	Telecommunications	2%			na	na	Service not at site, but avail in area	Service at the site
WEIGHT 20%		20%						
ENVIRONMENTAL								
24	Phase 1 Environmental Study	4%	X	Issues Reported, No Remed	No Completed / Unknown Issues	Issues Reported, Remed in Process	Completed - over 3 yrs old / No Issues	Completed - 3 years old / No issues
25	Hydrologic Studies	4%	X	Issues Reported, No Remed	No Completed / Unknown Issues	Issues Reported, Remed in Process	Completed - over 3 yrs old / No Issues	Completed - 3 years old / No issues
26	Rare, threatened Species	3%	X	Issues Reported, No Remed	No Completed / Unknown Issues	Issues Reported, Remed in Process	Completed - over 3 yrs old / No Issues	Completed - 3 years old / No issues
27	Archaeological	3%	X	Issues Reported, No Remed	No Completed / Unknown Issues	Issues Reported, Remed in Process	Completed - over 3 yrs old / No Issues	Completed - 3 years old / No issues
28	Geotechnical	4%	X	Issues Reported, No Remed	No Completed / Unknown Issues	Issues Reported, Remed in Process	Completed - over 3 yrs old / No Issues	Completed - 3 years old / No issues
WEIGHT 18%		18%						

What Scoring Does Not Include

- Price of Land
- Utility Capacities (assumes availability for typical user)
- Utility Costs
- Local Business Climate – permitting schedule, fees, etc
- Property Taxes
- State Taxes
- Labor Availability and Cost
- Incentives Availability

2. Benchmark Scoring and Knoxville Region Analysis

Step 2: Inventory Knoxville Region Sites and Benchmark Scoring

Knoxville-Oak Ridge Innovation Valley Region



Knoxville Regional Area – Site Information Gathering and Scoring

- Innovation Valley partners completed detailed site information forms for sites within their borders
- Completed forms submitted to Knoxville Chamber for submission to CCG
- Forms and sites reviewed
- Sites scored for each criteria and category

Knoxville-Oak Ridge Innovation Valley Region - Site Information Form

Knoxville-Oak Ridge Innovation Valley Region - Site Information Form

Knoxville-Oak Ridge Innovation Valley Region - Site Information Form

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Knoxville-Oak Ridge Innovation Valley Region - Industrial Land Inventory Study

Site Information Form

Site Name:

County (where site is located):

City (where site is located):

Contact Information: (for completion of site information form)

Please attach

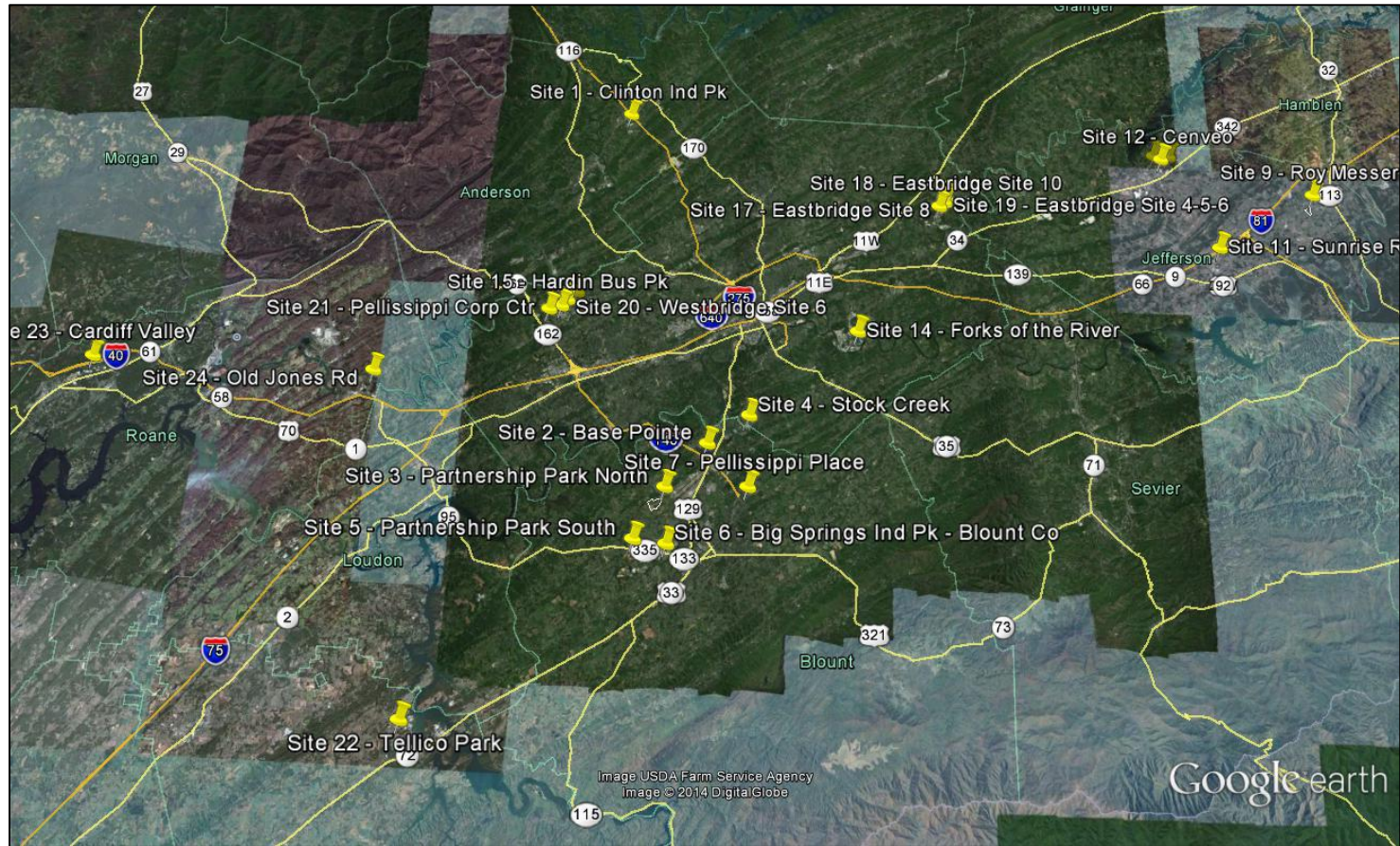
Hammer

Knoxville

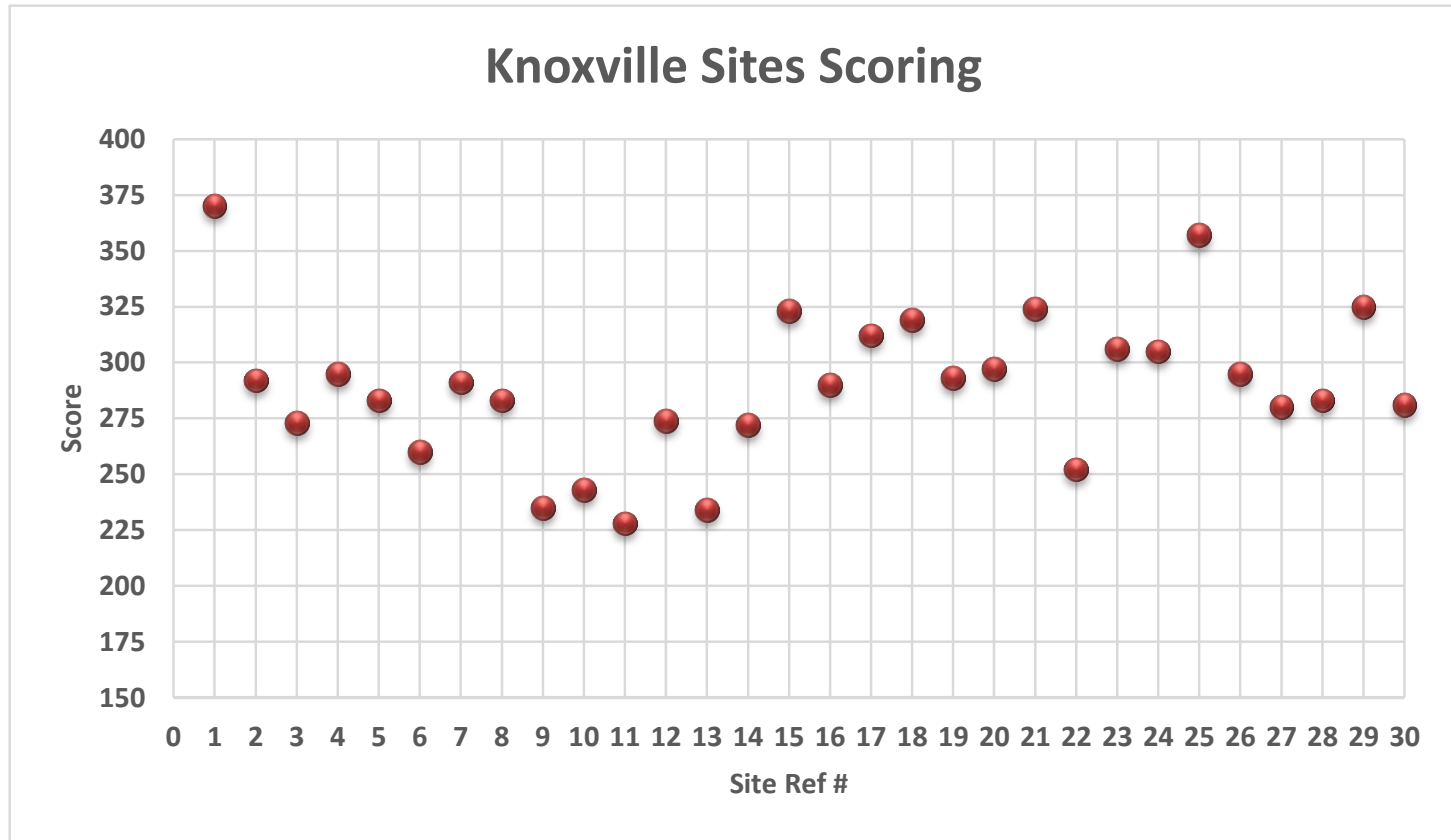
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KNOXVILLE OAK RIDGE INNOVATION VALLEY

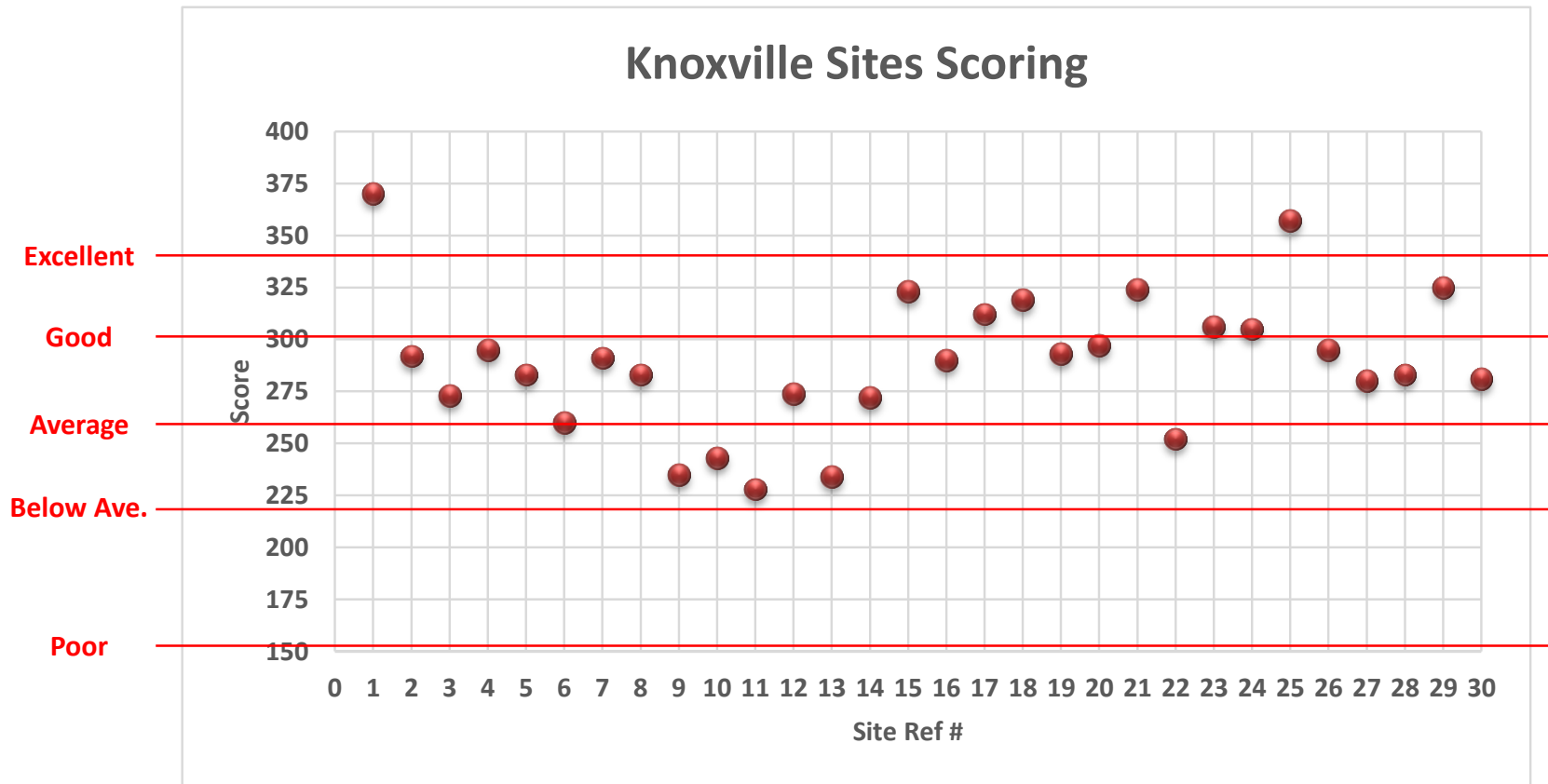
Knoxville, TN



Scoring: Knoxville Region Sites



Scoring: Knoxville Region Sites



Knoxville Region Sites - Scoring Summary

Ref #	Name	Acres	Score	Ranking	Category
1	Clinton Ind Pk - Anderson Co	53	370	1	Excellent
2	Base Pointe - Blount Co	48	292	14	Average
3	Partnership Park North - Blount Co	226	273	23	Average
4	Stock Creek Ind Park - Blount Co	120	295	11	Average
5	Partnership Park South - Blount Co	210	283	17	Average
6	Big Springs Ind Pk - Blount Co	130	260	25	Average
7	Pellissippi Park - Blount Co	450	291	15	Average
8	Airport Site - Blount Co	45	283	17	Average
9	Roy Messer - Jefferson Co	77	235	28	Below Ave
10	Jefferson City Ind Park - Jefferson Co	16	243	27	Below Ave
11	Sunrise Ridge - Jefferson Co	26	228	30	Below Ave
12	Cenveo - Jefferson Co	21	274	22	Average
13	Hunt Property - Jefferson Co	68	234	29	Below Ave
14	Forks of the River - Knox Co	14	272	24	Average
15	Hardin Bus Pak - Knox Co	90	323	5	Good
16	Karns Valley - Knox Co	70	290	16	Average
17	Eastbridge Ind Park - Site 8 - Knox Co	14	312	7	Good
18	Eastbridge Ind Park - Site 10 - Knox Co	16	319	6	Good
19	Eastbridge Ind Park - Sites 4-5-6 - Knox Co	124	293	13	Average
20	Westbridge Site 6 - Knox Co	11	297	10	Average
21	Pellissippi Corporate Center - Knox Co	82	324	4	Good
22	Tellico Ind Pk - Monroe Co	562	252	26	Below Ave
23	Cardiff Valley Site - Roane Co	45	306	8	Good
24	Jones Rd - Roane Co	40	305	9	Good
25	Centre 75 Bus Pk Lot 7 - Loudon Co*	89	357	2	Excellent
26	Highlands Bus Pk - Loudon Co*	155	295	11	Average
27	Huntington Bus Pk - Loudon Co*	140	280	21	Average
28	Lenoir Car Works Site - Loudon Co*	99	283	17	Average
29	Horizon Center - Oak Ridge - Roane Co*	110	325	3	Good
30	Heritage - Oak Ridge - Roane Co*	40	281	20	Average

Knoxville Region Sites – Scoring & Acreage Summary by Category

Site #	Name	County	Acres	Score	Ranking	Category	Total Ac.	% Total
1	Clinton Ind Pk - Anderson Co	Anderson	53	370	1	Excellent	142	4.5%
25	Centre 75 Bus Pk Lot 7 - Loudon Co	Loudon	89	357	2	Excellent		
29	Horizon Center - Oak Ridge - Roane Co	Roane	110	325	3	Good	397	12.4%
21	Pellissippi Corporate Center - Knox Co	Knox	82	324	4	Good		
15	Hardin Bus Pak - Knox Co	Knox	90	323	5	Good		
18	Eastbridge Ind Park - Site 10 - Knox Co	Knox	16	319	6	Good		
17	Eastbridge Ind Park - Site 8 - Knox Co	Knox	14	312	7	Good		
23	Cardiff Valley Site - Roane Co	Roane	45	306	8	Good		
24	Jones Rd - Roane Co	Roane	40	305	9	Good		
20	Westbridge Site 6 - Knox Co	Knox	11	297	10	Average	1,903	59.6%
4	Stock Creek Ind Park - Blount Co	Blount	120	295	11	Average		
26	Highlands Bus Pk - Loudon Co	Loudon	155	295	11	Average		
19	Eastbridge Ind Park - Sites 4-5-6 - Knox Co	Knox	124	293	13	Average		
2	Base Pointe - Blount Co	Blount	48	292	14	Average		
7	Pellissippi Park - Blount Co	Blount	450	291	15	Average		
16	Karns Valley - Knox Co	Knox	70	290	16	Average		
5	Partnership Park South - Blount Co	Blount	210	283	17	Average		
8	Airport Site - Blount Co	Blount	45	283	17	Average		
28	Lenoir Car Works Site - Loudon Co	Loudon	99	283	17	Average		
30	Heritage - Oak Ridge - Roane Co	Roane	40	281	20	Average		
27	Huntington Bus Pk - Loudon Co	Loudon	140	280	21	Average		
12	Cenveo - Jefferson Co	Jefferson	21	274	22	Average		
3	Partnership Park North - Blount Co	Blount	226	273	23	Average		
14	Forks of the River - Knox Co	Knox	14	272	24	Average		
6	Big Springs Ind Pk - Blount Co	Blount	130	260	25	Average		
22	Tellico Ind Pk - Monroe Co	Monroe	562	252	26	Below Average	749	23.5%
10	Jefferson City Ind Park - Jefferson Co	Jefferson	16	243	27	Below Average		
9	Roy Messer - Jefferson Co	Jefferson	77	235	28	Below Average		
13	Hunt Property - Jefferson Co	Jefferson	68	234	29	Below Average		
11	Sunrise Ridge - Jefferson Co	Jefferson	26	228	30	Below Average		
TOTAL			3,191					

Knoxville Region Sites - Scoring & Acreage Summary by County

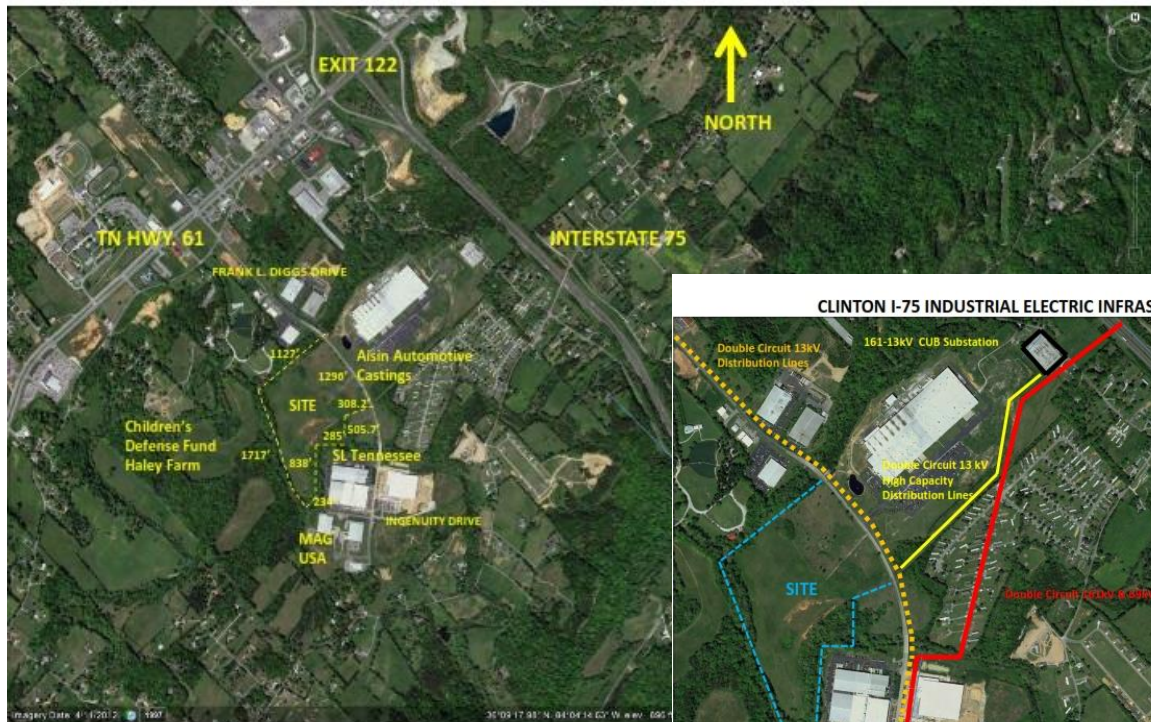
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3	Partnership Park North - Blount Co	Blount	226	273	23	Average		
6	Big Springs Ind Pk - Blount Co	Blount	130	260	25	Average	1,229	38.5%
12	Cenveo - Jefferson Co	Jefferson	21	274	22	Average		
10	Jefferson City Ind Park - Jefferson Co	Jefferson	16	243	27	Below Average		
9	Roy Messer - Jefferson Co	Jefferson	77	235	28	Below Average		
13	Hunt Property - Jefferson Co	Jefferson	68	234	29	Below Average		
11	Sunrise Ridge - Jefferson Co	Jefferson	26	228	30	Below Average	208	6.5%
21	Pellissippi Corporate Center - Knox Co	Knox	82	324	4	Good		
15	Hardin Bus Pak - Knox Co	Knox	90	323	5	Good		
18	Eastbridge Ind Park - Site 10 - Knox Co	Knox	16	319	6	Good		
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16	Karns Valley - Knox Co	Knox	70	290	16	Average		
14	Forks of the River - Knox Co	Knox	14	272	24	Average	421	13.2%
25	Centre 75 Bus Pk Lot 7 - Loudon Co	Loudon	89	357	2	Excellent		
26	Highlands Bus Pk - Loudon Co	Loudon	155	295	11	Average		
28	Lenoir Car Works Site - Loudon Co	Loudon	99	283	17	Average		
27	Huntington Bus Pk - Loudon Co	Loudon	140	280	21	Average	483	15.1%
22	Tellico Ind Pk - Monroe Co	Monroe	562	252	26	Below Average	562	17.6%
29	Horizon Center - Oak Ridge - Roane Co	Roane	110	325	3	Good		
23	Cardiff Valley Site - Roane Co	Roane	45	306	8	Good		
24	Jones Rd - Roane Co	Roane	40	305	9	Good		
30	Heritage - Oak Ridge - Roane Co	Roane	40	281	20	Average	235	7.4%
	TOTAL		3,191					

Innovation Valley Region: “Excellent” Sites

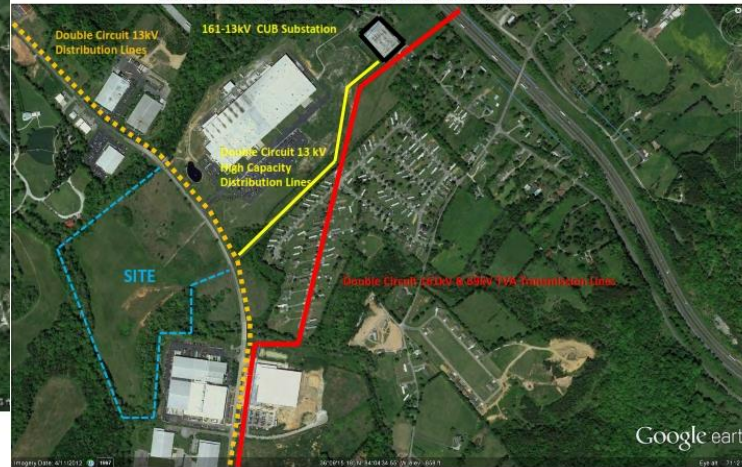
1. Clinton I-75 Industrial Park – Anderson County (53 acres / 370 pts.)
2. Centre 75 Business Park – Loudon County (89 acres / 357 pts.)

Clinton I-75 Industrial Park – Anderson County

CLINTON I-75 INDUSTRIAL PARK SITE



CLINTON I-75 INDUSTRIAL ELECTRIC INFRASTRUCTURE



DOUBLE CIRCUIT 13KV DISTRIBUTION LINES

DOUBLE CIRCUIT 13KV HIGH CAPACITY DISTRIBUTION LINES



DOUBLE CIRCUIT 13kV & 69 kV TVA TRANSMISSION LINES

161-13kV CUB SUBSTATION



- 53 acres
- Utility and Road Infrastructure in place
- Site cleared and ready for development
- Certified in Select TN program

Centre 75 Business Park – Loudon County



- 89 acres
- Utility and Road Infrastructure in place
- Grading plan available
- Due diligence studies completed
- Certified in Select TN program

Innovation Valley Region: “Good” Sites

1. Horizon Center – (Oak Ridge) Roane County (110 acres / 325 pts.)
2. Pelissippi Corporate Center – Knox County (82 acres / 324 pts.)
3. Hardin Business Park – Knox County (90 acres / 323 pts)
4. Eastbridge Industrial Park Site 10 – Knox County (16 acres / 319 pts.)
5. Eastbridge Industrial Park Site 8 – Knox County (14 acres / 312 pts.)
6. Cardiff Valley Site – Roane County (45 acres / 306 pts.)
7. Jones Road Site – Roane County (40 acres / 305 pts.)

Knoxville Region Sites Assessment

PROS

- Some nice site options available in developed business parks
- 9 sites scored in the “Excellent” or “Good” categories

CONS

- Most of the high scoring sites have limited acreage
- Limited number of large (50+ and 100+ acre) sites available
- No “mega” sites available (1000+ acres)

3. Competitor Regions Sites Analysis and Scoring

Step 3: Competitor Region Sites and Scoring

Competitor Regions:

- Birmingham, AL
- Chattanooga, TN
- Columbia, SC
- Charlotte, NC
- Nashville, TN
- Greenville, SC
- Roanoke, VA

Competitor Regions - Site Identification and Screening

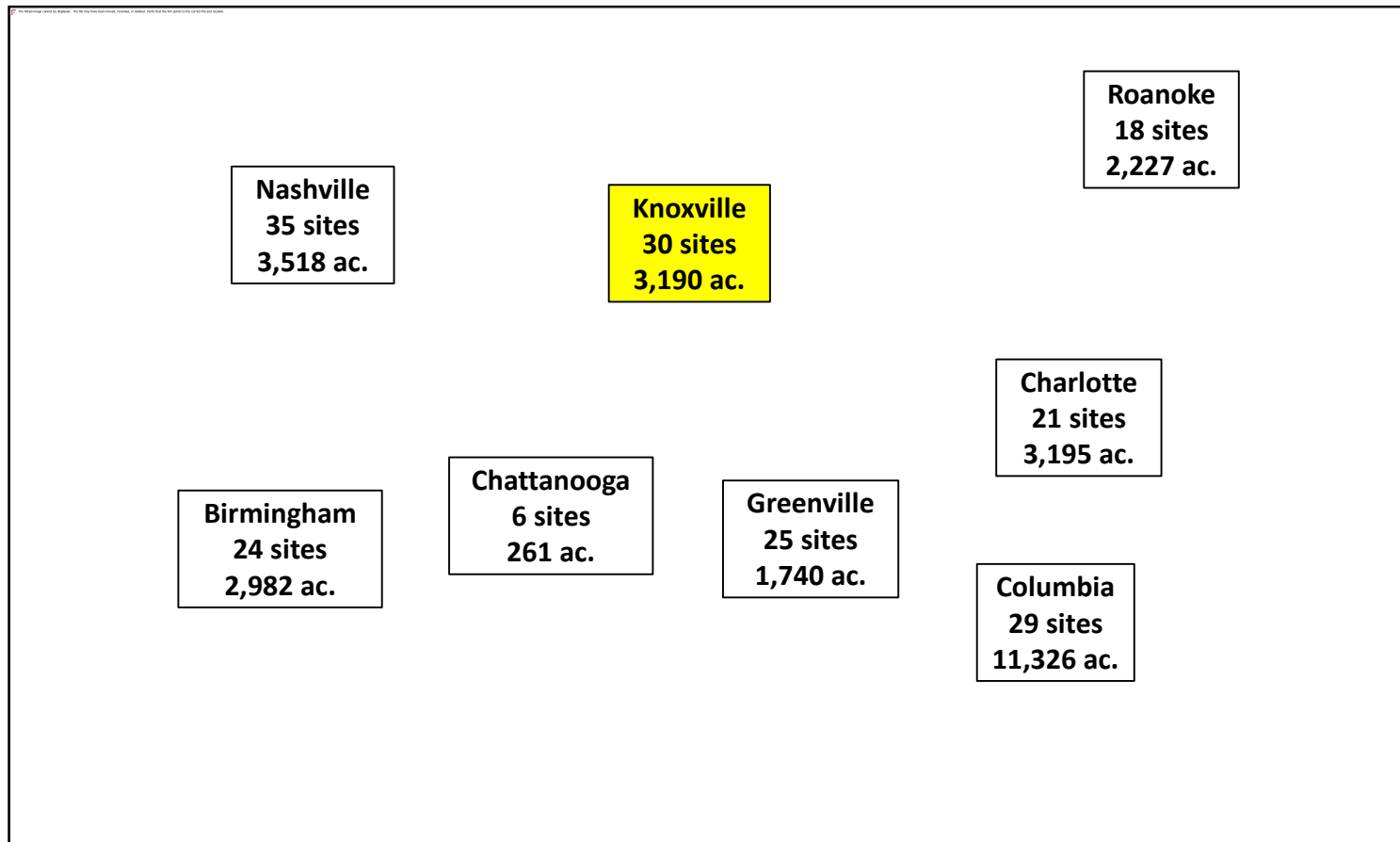
- Utilized Regional Economic Development websites for site searches
- Screened sites that didn't meet minimum criteria for
 - Zoning – Industrial or Planned Use Industrial (Primary Use)
 - Size – 10 developable acres or more
 - Utilities - at or near site (as identified as best as possible)
 - Vacant Land – sites with existing buildings were eliminated
- *Note: This report does not claim to have captured all available sites in each regional area. The report simply contains those sites contained and marketed through regional EDO site databases. Information is only as accurate as the information contained in the databases. In a few cases, CCG was able to supplement or modify data and scoring for a particular site based on recent past project knowledge.*

Competitor Region Sources

Site identification and details for competitor region sites were sourced through websites and databases from the following:

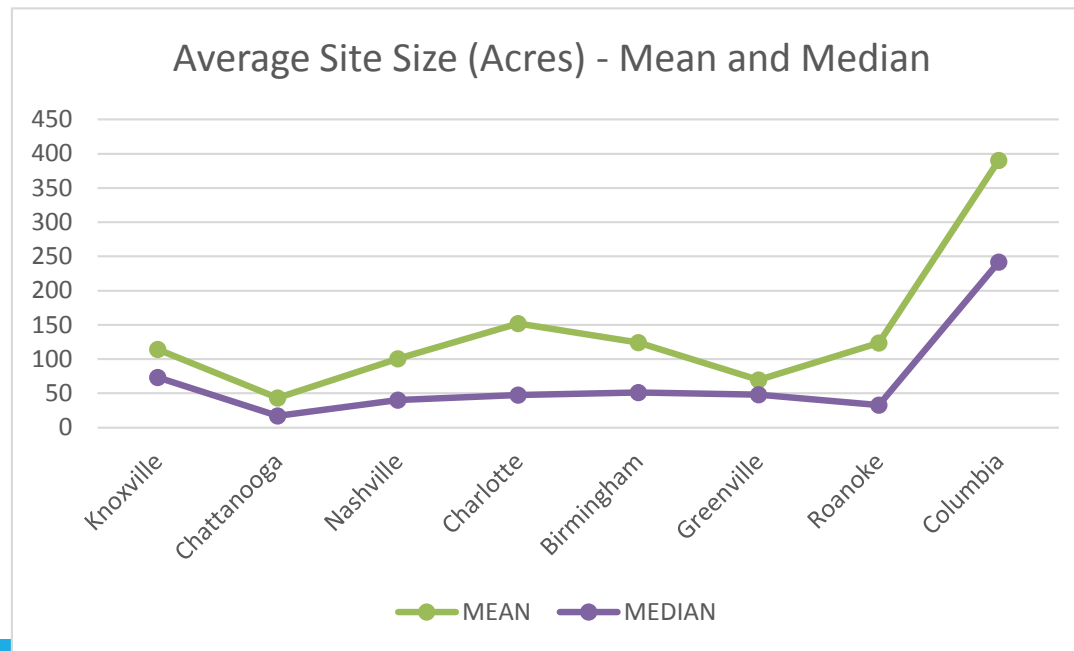
- Birmingham, AL – Birmingham Business Alliance
- Chattanooga, TN – Chattanooga CAN DO; TVAsites
- Charlotte, NC – Charlotte Regional Partnership
- Columbia, SC – Central SC
- Greenville, SC - Greenville Economic Development; Locate SC (state)
- Nashville, TN – Nashville Chamber Economic Development (TVAsites)
- Roanoke, VA – Roanoke Regional Partnership

Number of Sites and Total Acreage – Knoxville vs Competitor Regions



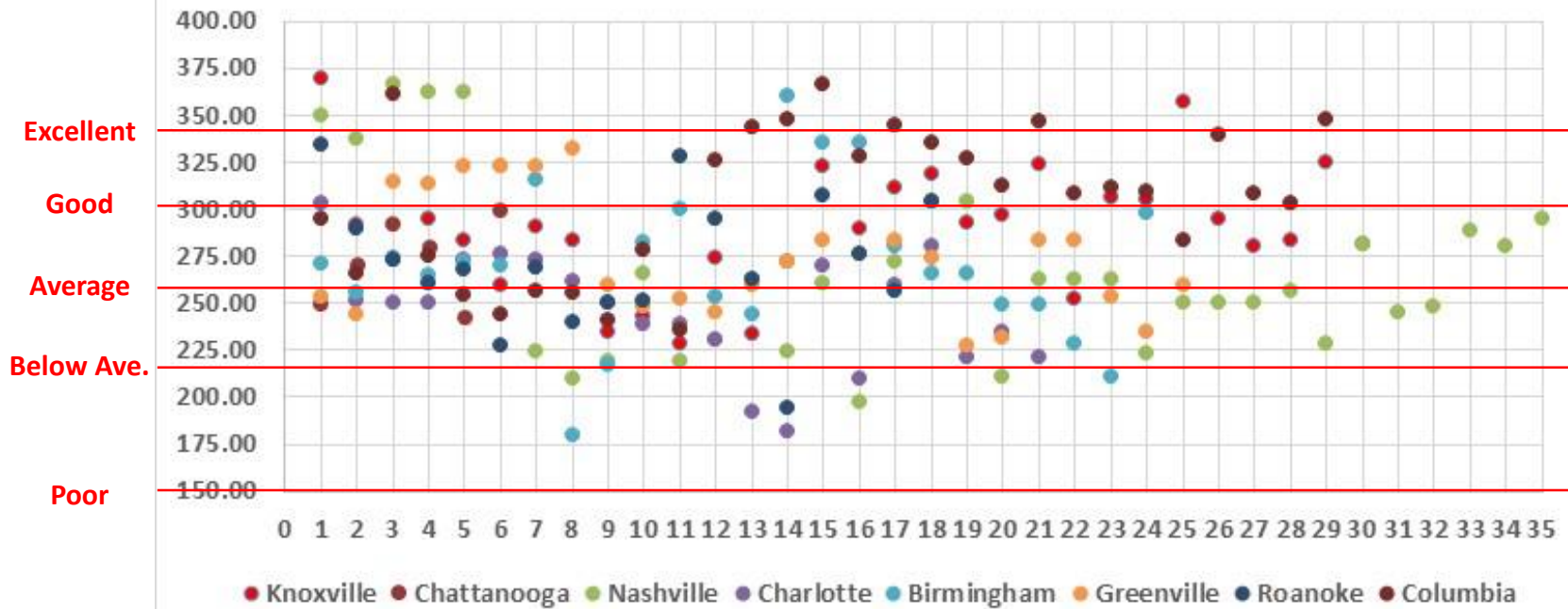
Site Acreage Stats – Knoxville vs Competitor Regions

	<u>Knoxville</u>	<u>Chattanooga</u>	<u>Nashville</u>	<u>Charlotte</u>	<u>Birmingham</u>	<u>Greenville</u>	<u>Roanoke</u>	<u>Columbia</u>
TOTAL	3190	261	3518	3193	2982	1740	2227	11326
MEAN	106	43	101	152	124	70	124	391
MEDIAN	74	17	40	47	51	48	33	242
# SITES	30	6	35	21	24	25	18	29

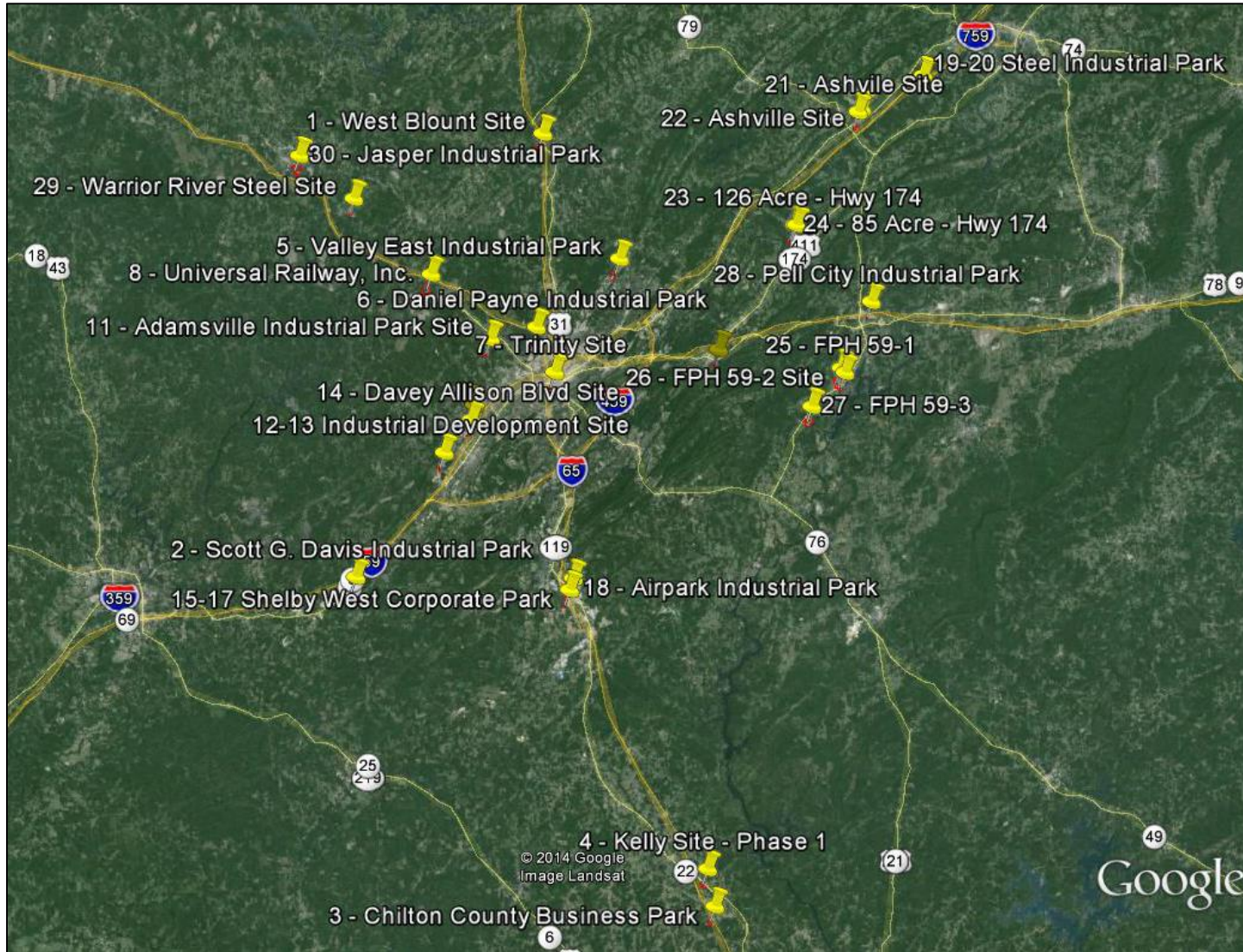


Knoxville and Competitor Region Site Scores

Scoring Chart: Knoxville and Competitor Region Sites



Birmingham, AL

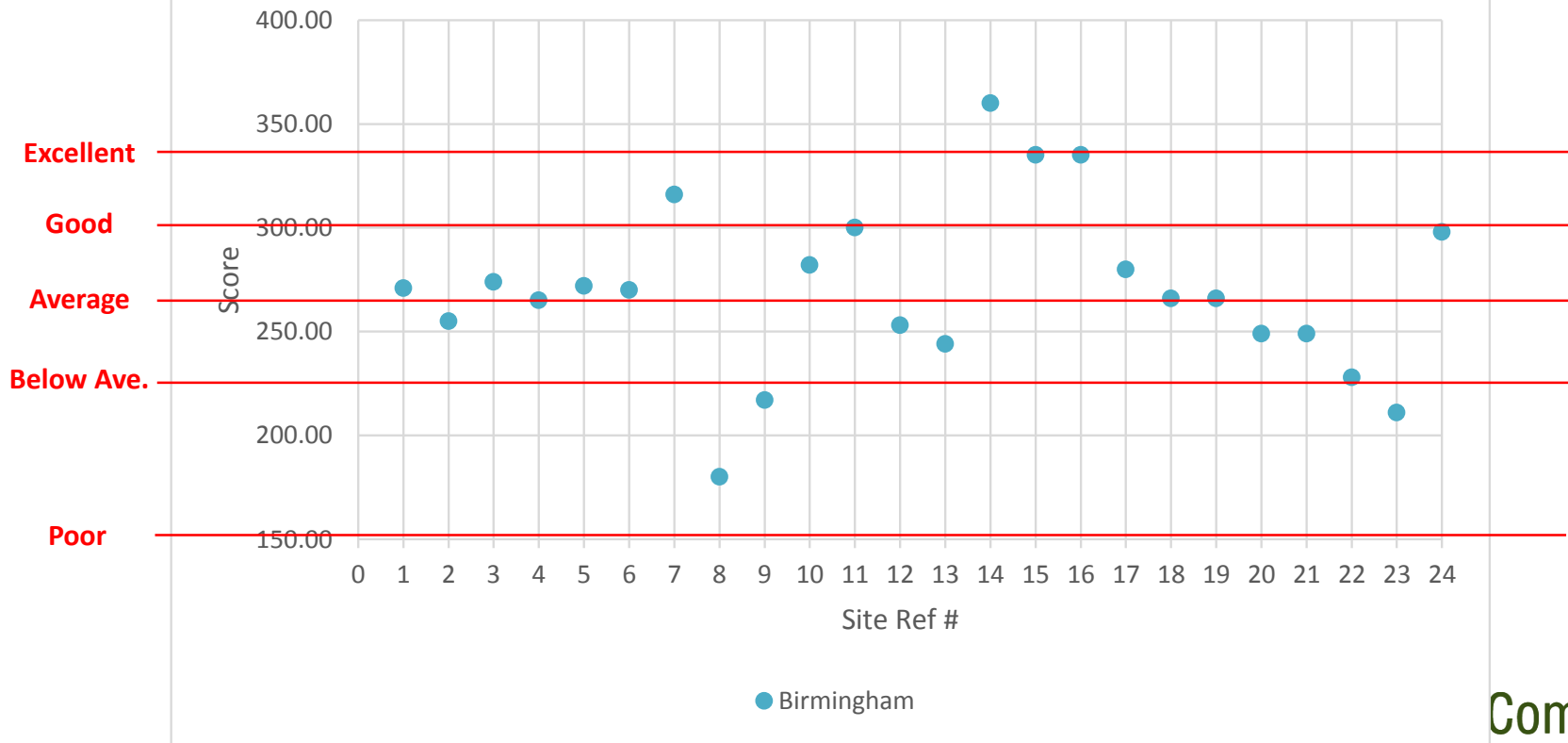


- 25 sites
- 7 Counties

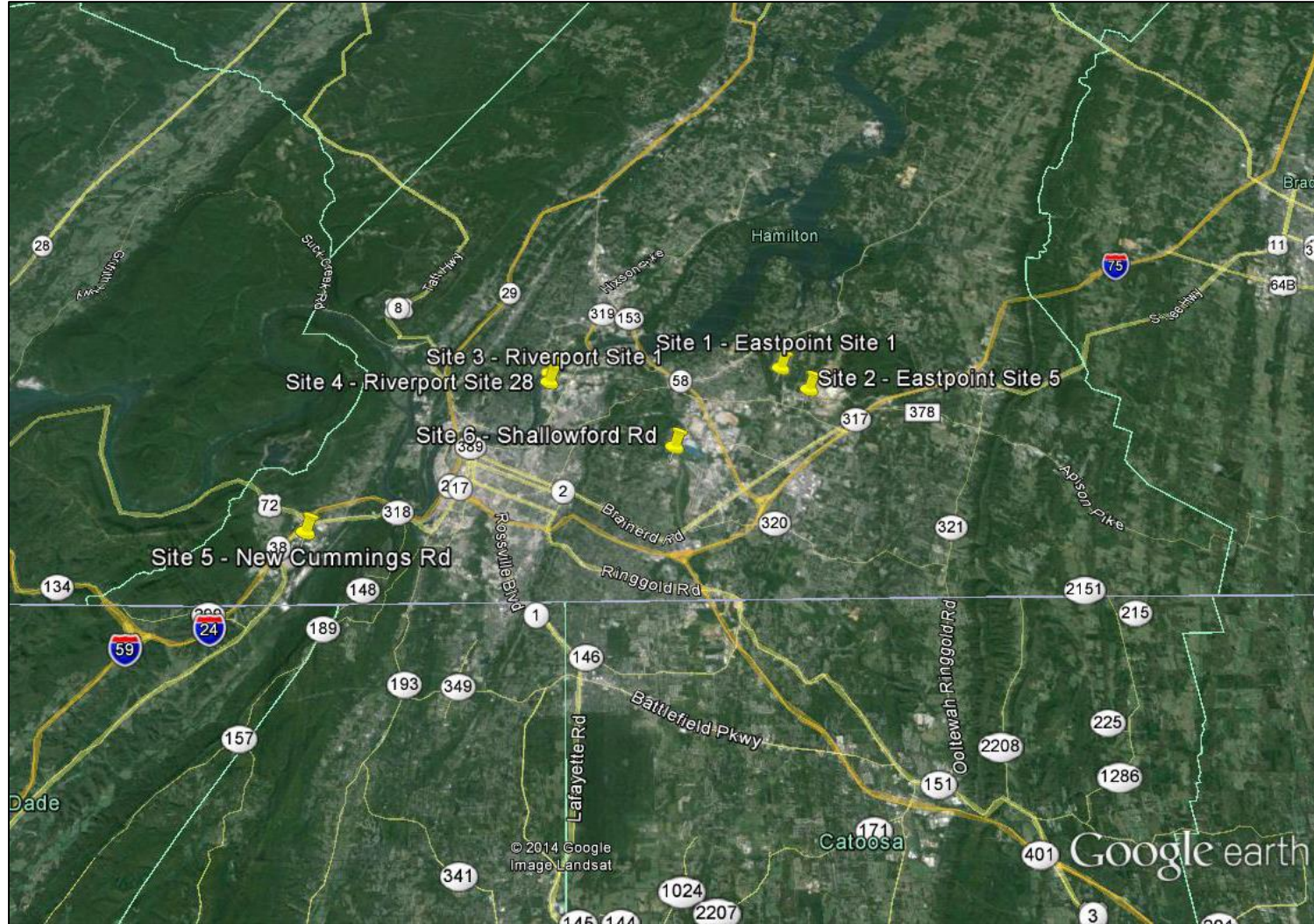


Birmingham, AL

Competitor Region Site Scoring Chart

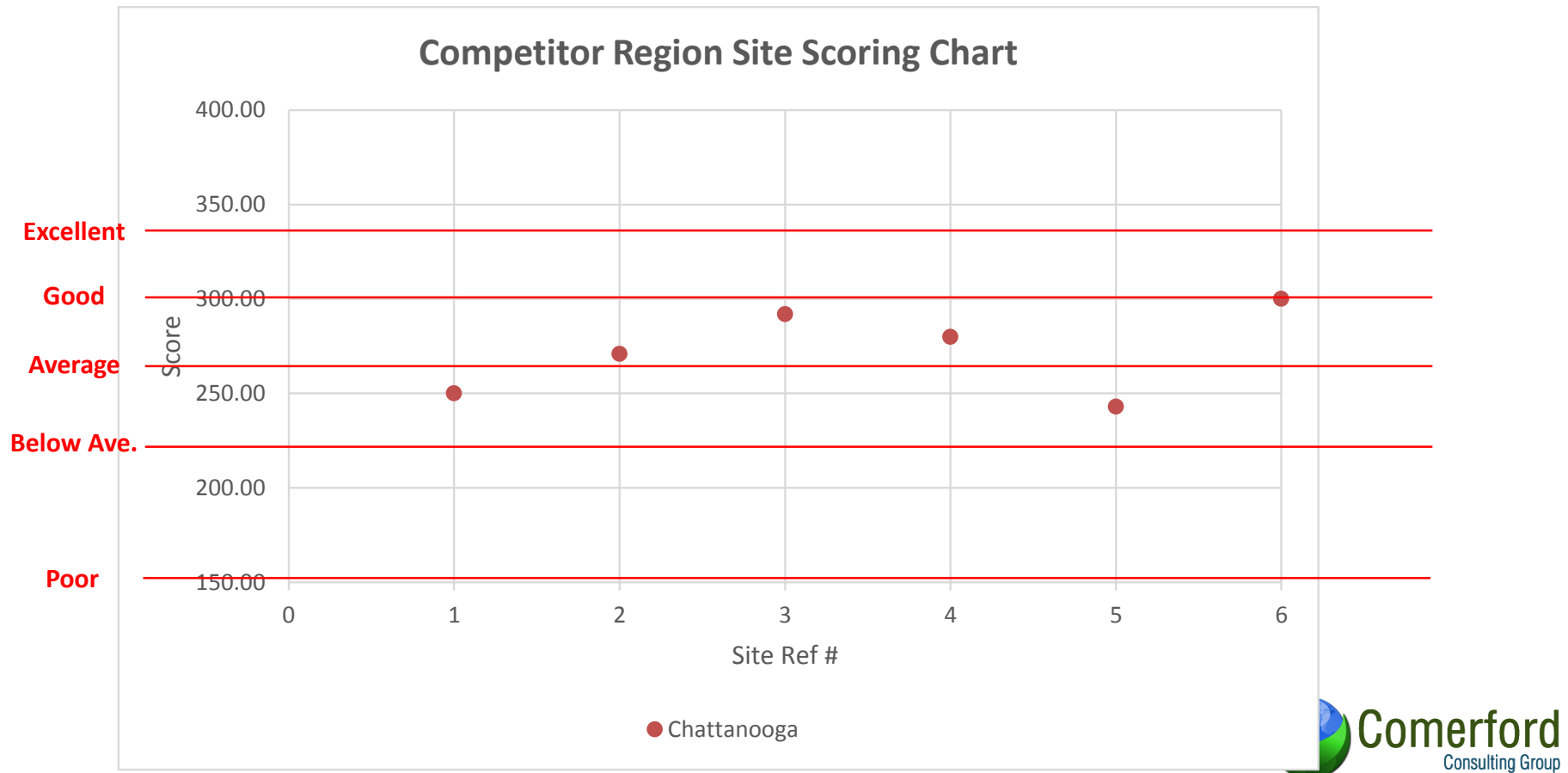


Chattanooga, TN



- 6 sites
- 1 county

Chattanooga, TN



Map of South Carolina showing 29 industrial sites marked with yellow pushpins. The sites are numbered 1 through 29, with some names truncated. The map includes major highways like I-95, I-26, and I-20, and labels for various cities and counties. The sites are:

- 1 - Pineview Industrial Site
- 2 - Air Base Road Site
- 3 - Carolina Pines Industrial Park
- 4 - Carolina Research Park
- 5 - CCC Land
- 6 - Crane Creek Property
- 8 - I-20 and Percival Road
- 10 - Lt. Shannon et al
- 11 - Pineview Industrial Site
- 12 - Brogdon West Industrial Site
- 13 - Calhoun County I-26 Industrial Park
- 14 - Central South Carolina MegaSite
- 15 - Clarendon County Industrial Park
- 16 - Fairfield Commerce Center
- 17 - I-20 Industrial Center
- 18 - I-95 Megasite
- 19 - International Commerce Park
- 20 - Jafza Magna Park - Santee
- 21 - James Complex Industrial P
- 22 - John W. Matthews Jr. Industrial Park
- 23 - Jafza Magna Park - Santee
- 24 - Jafza Magna Park - Santee
- 25 - Mixon Site
- 26 - Jafza Magna Park - Santee
- 27 - Jafza Magna Park - Santee
- 28 - Summerton Commerce Village
- 29 - West Annex Ind. Site

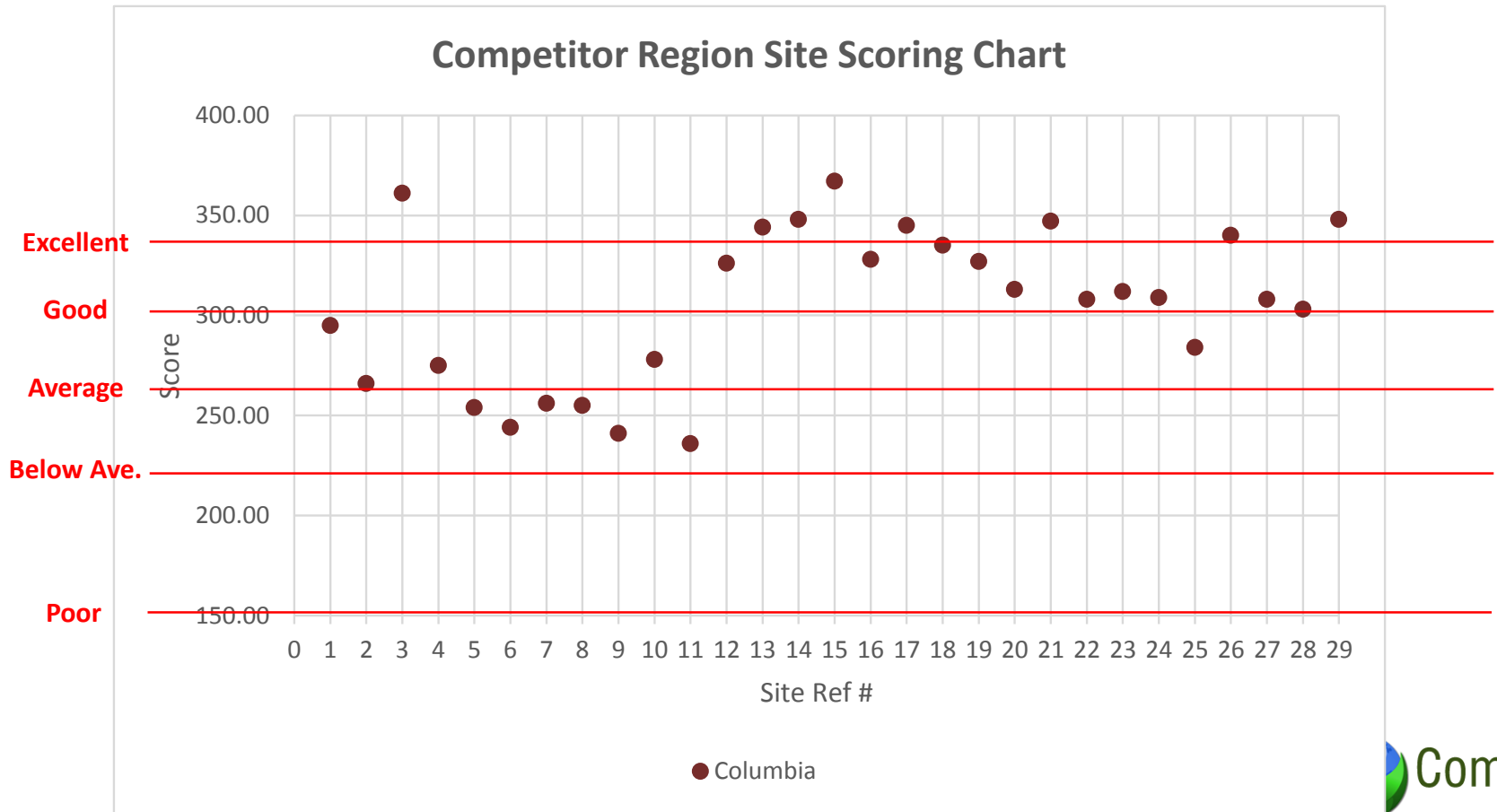
Map labels include: Fairfield, Kershaw, Darlington, Lee, Sumter, Lexington, Richland, Calhoun, Clarendon, Orangeburg, Santee, and Marlboro. Highway labels include 20, 26, 95, 391, 321, 78, 401, 403, 521, 52, 527, 261, 26, 95, 70, 76, 34, 32, 31, 30, 29, 28, 27, 26, 25, 24, 23, 22, 21, 20, 19, 18, 17, 16, 15, 14, 13, 12, 11, 10, 9, 8, 7, 6, 5, 4, 3, 2, 1.

© 2014 Google
Image Landsat

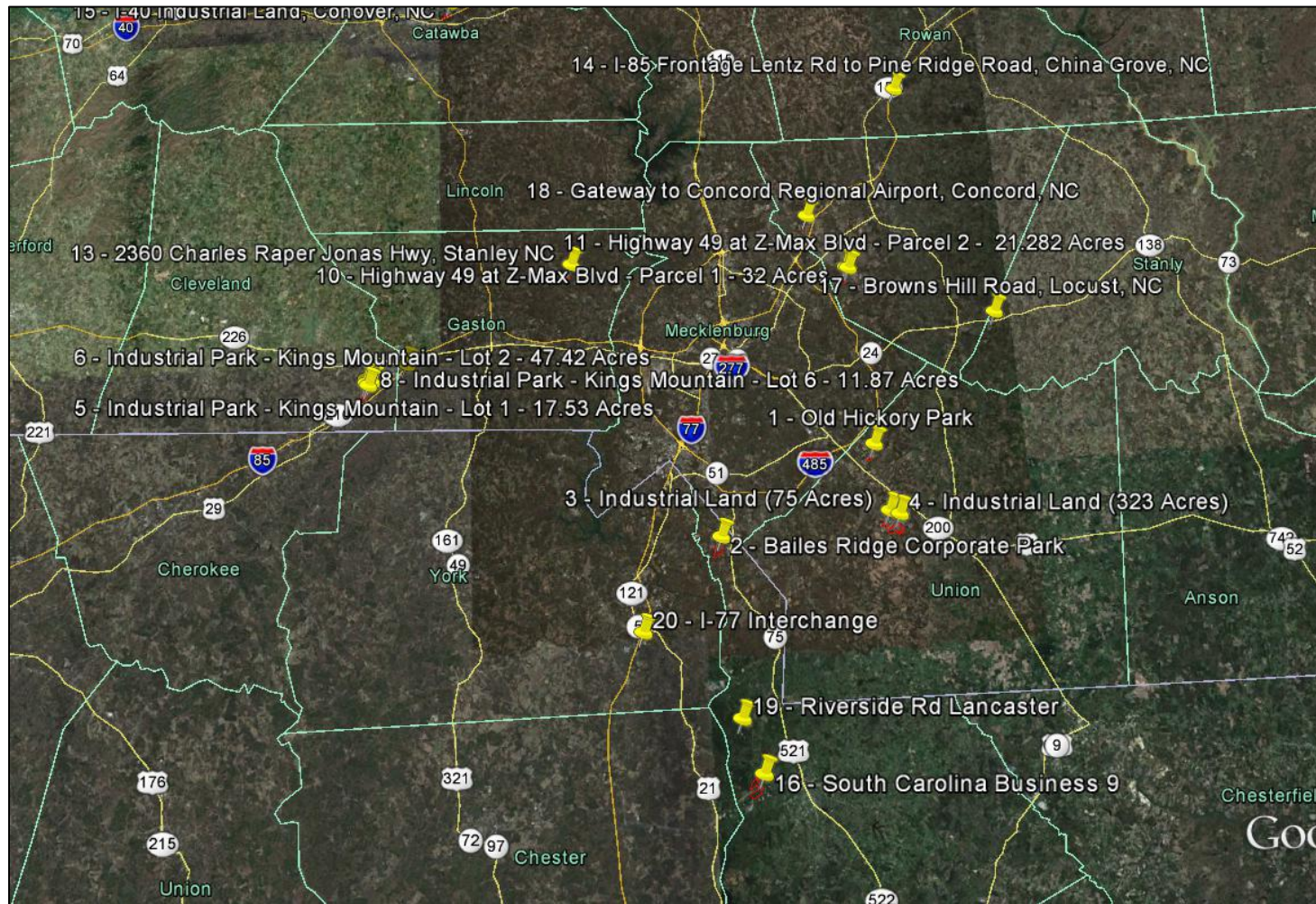
Google earth

- 
- Comerford**
Consulting Group

Columbia, SC

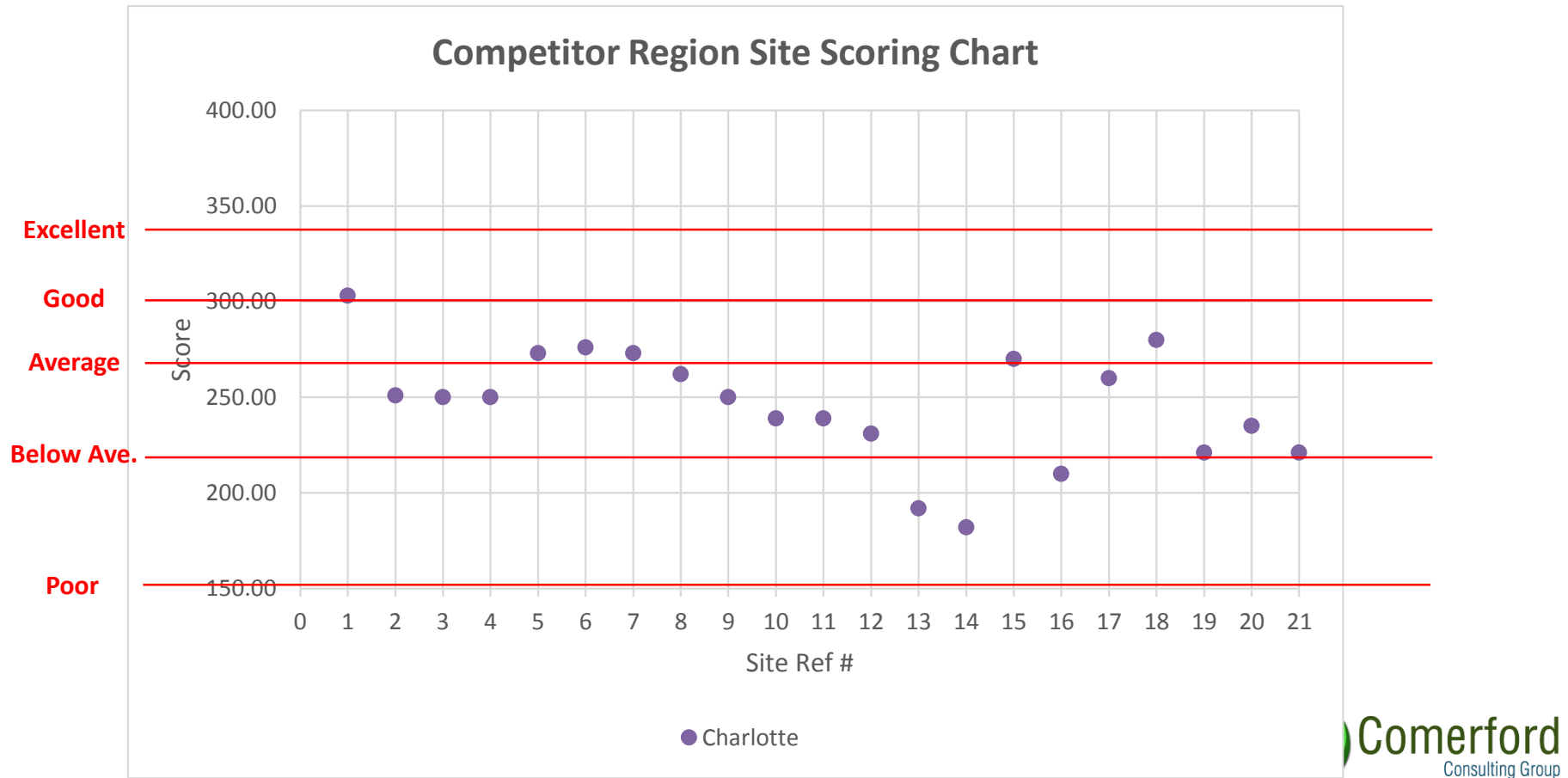


Charlotte, NC

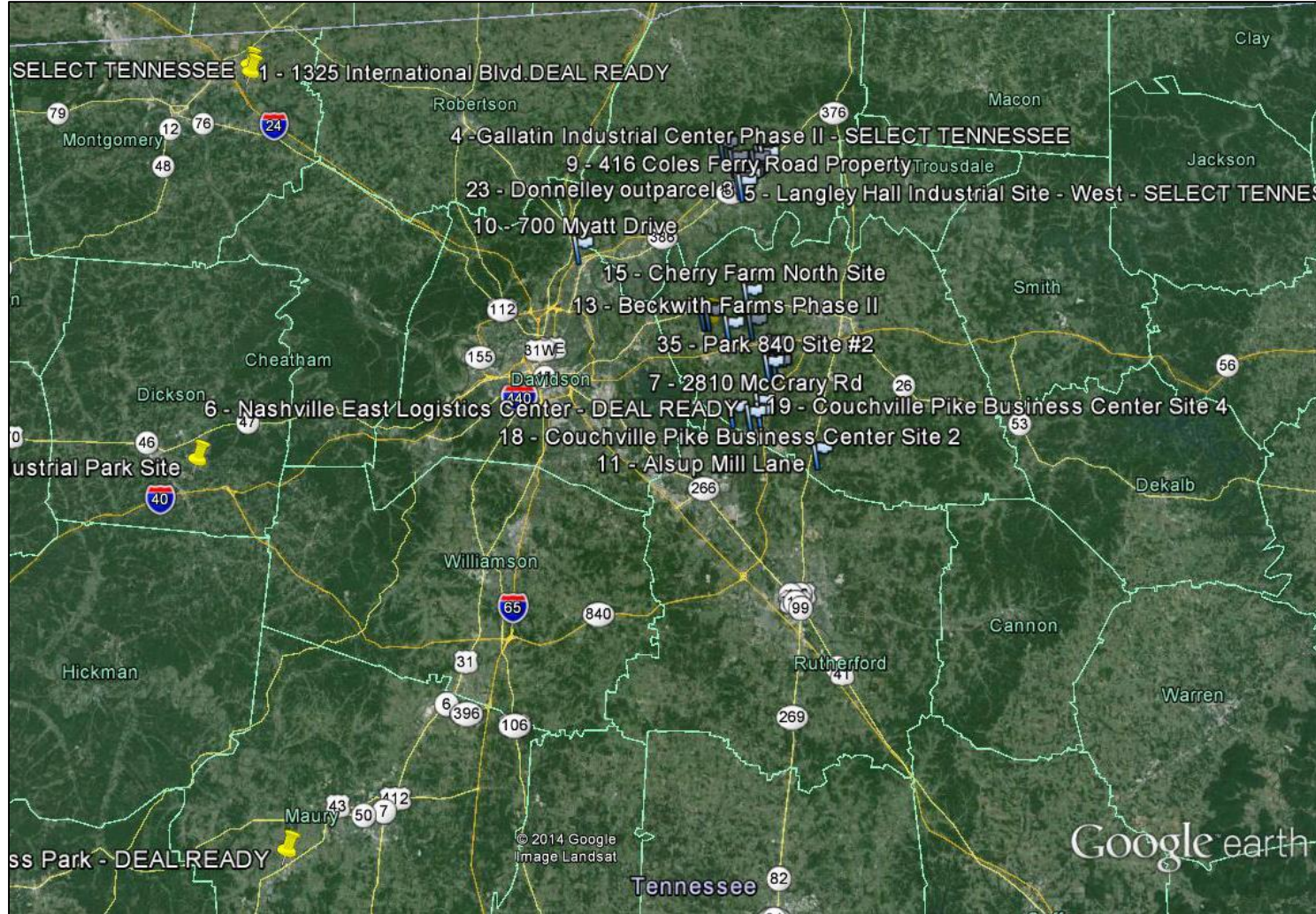


- 21 sites
- 10 counties

Charlotte, NC

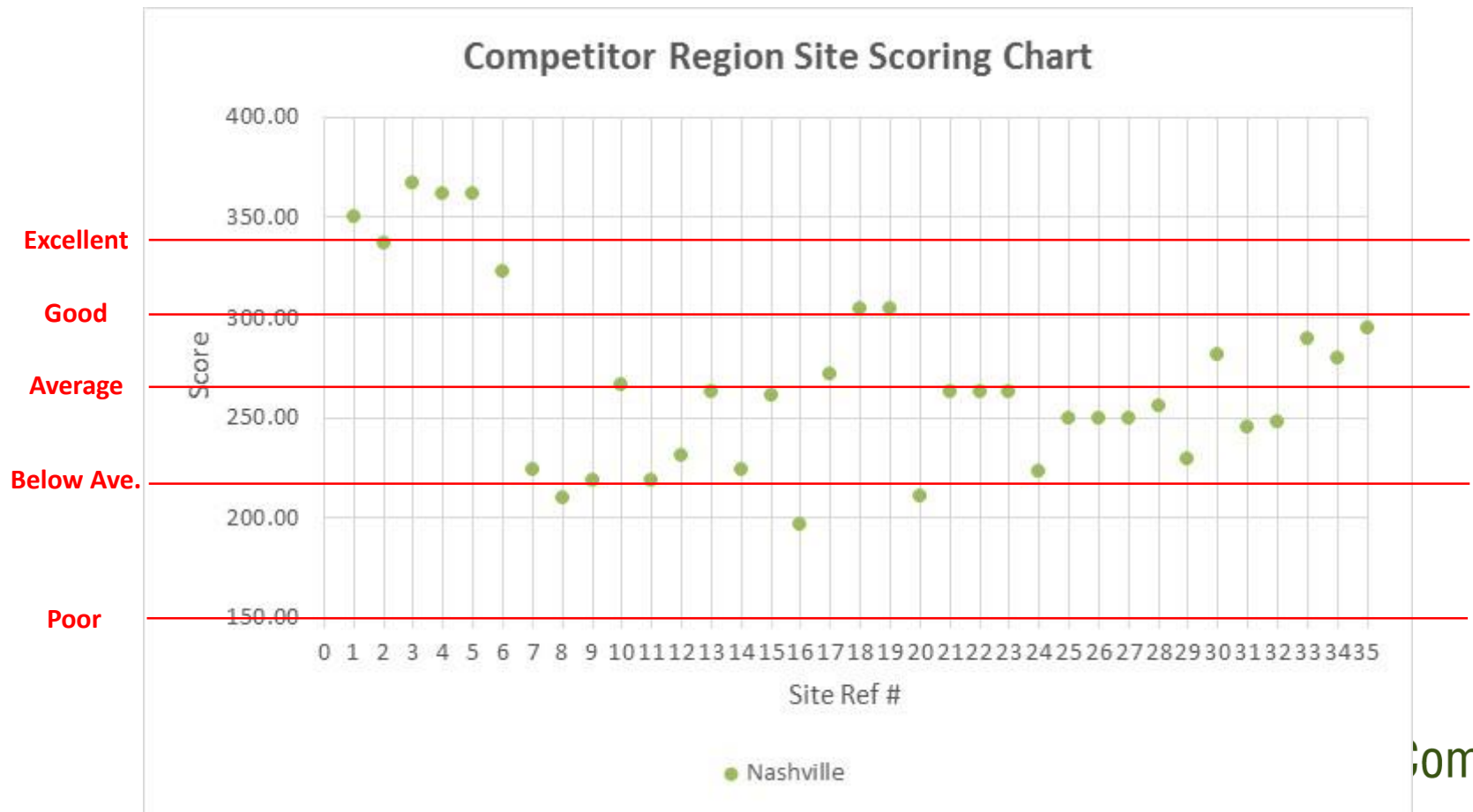


Nashville, TN

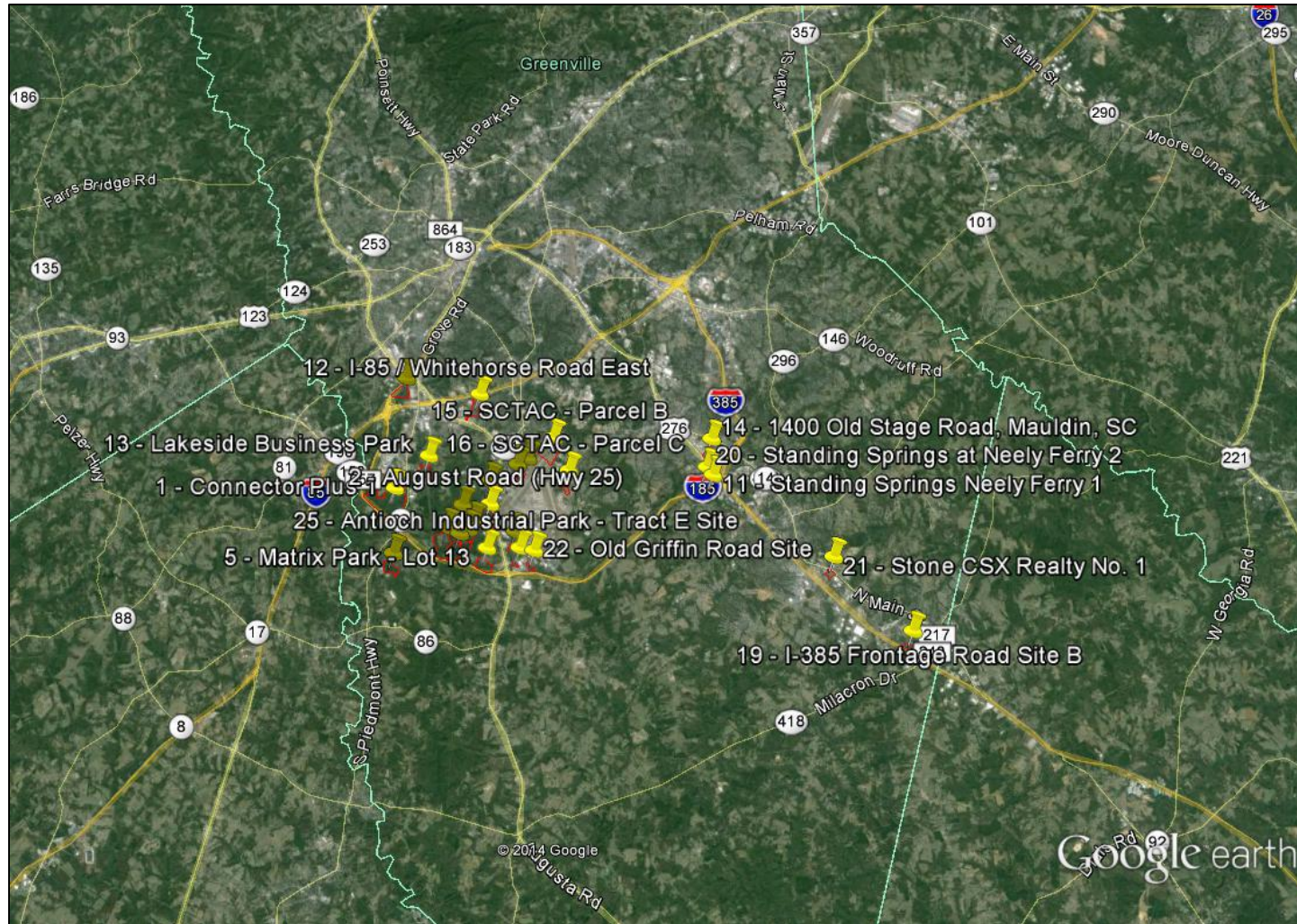


- 35 sites
- 6 counties

Nashville, TN



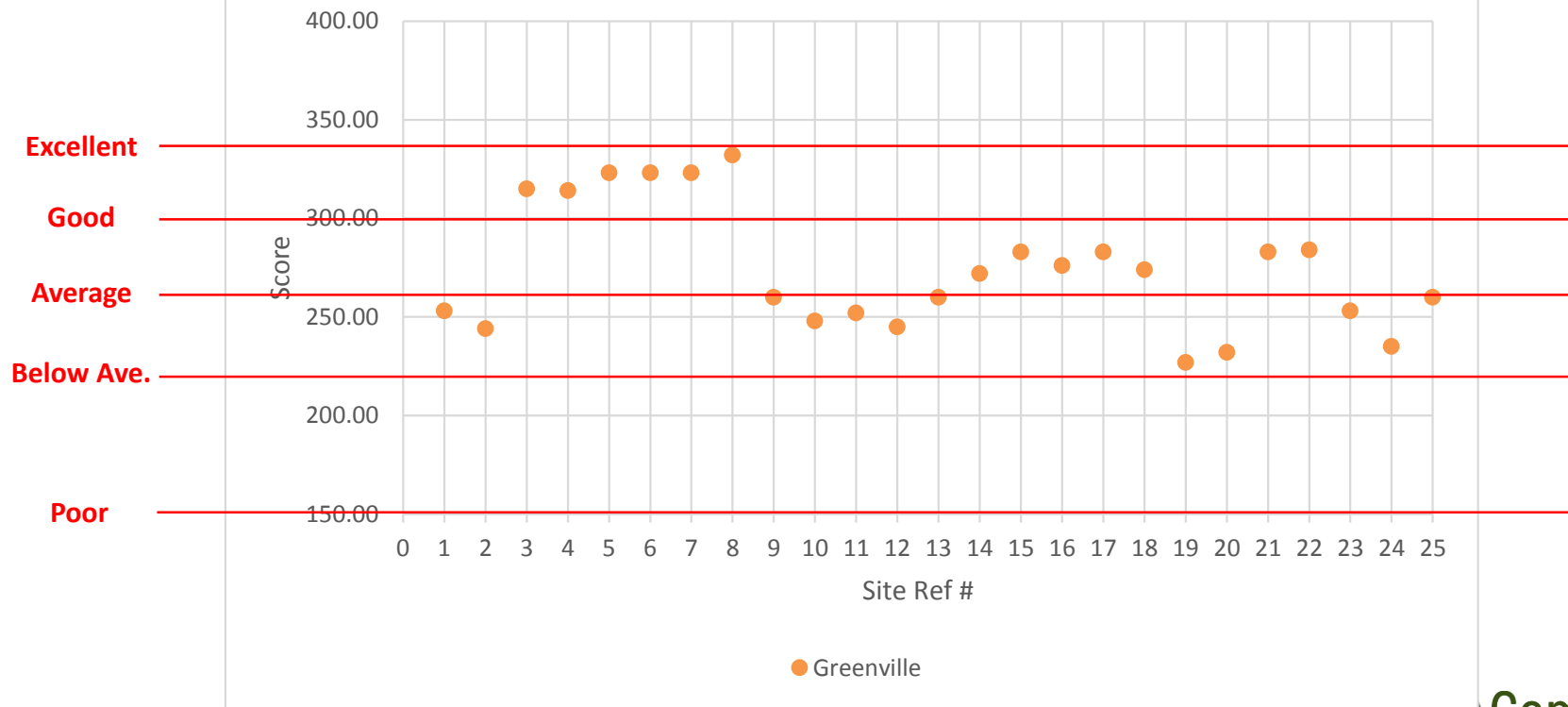
Greenville, SC



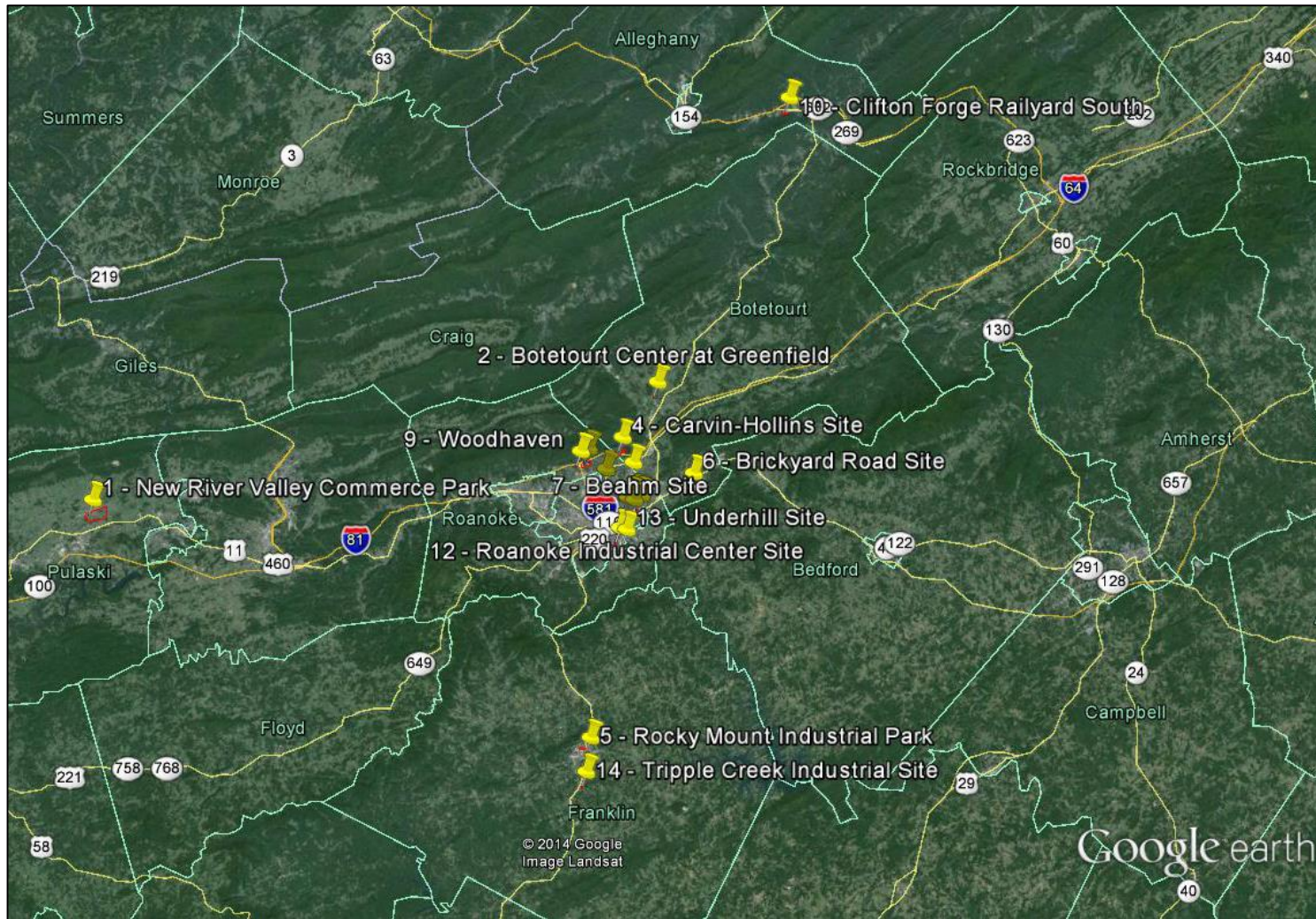
- 25 sites

Greenville, SC

Competitor Region Site Scoring Chart



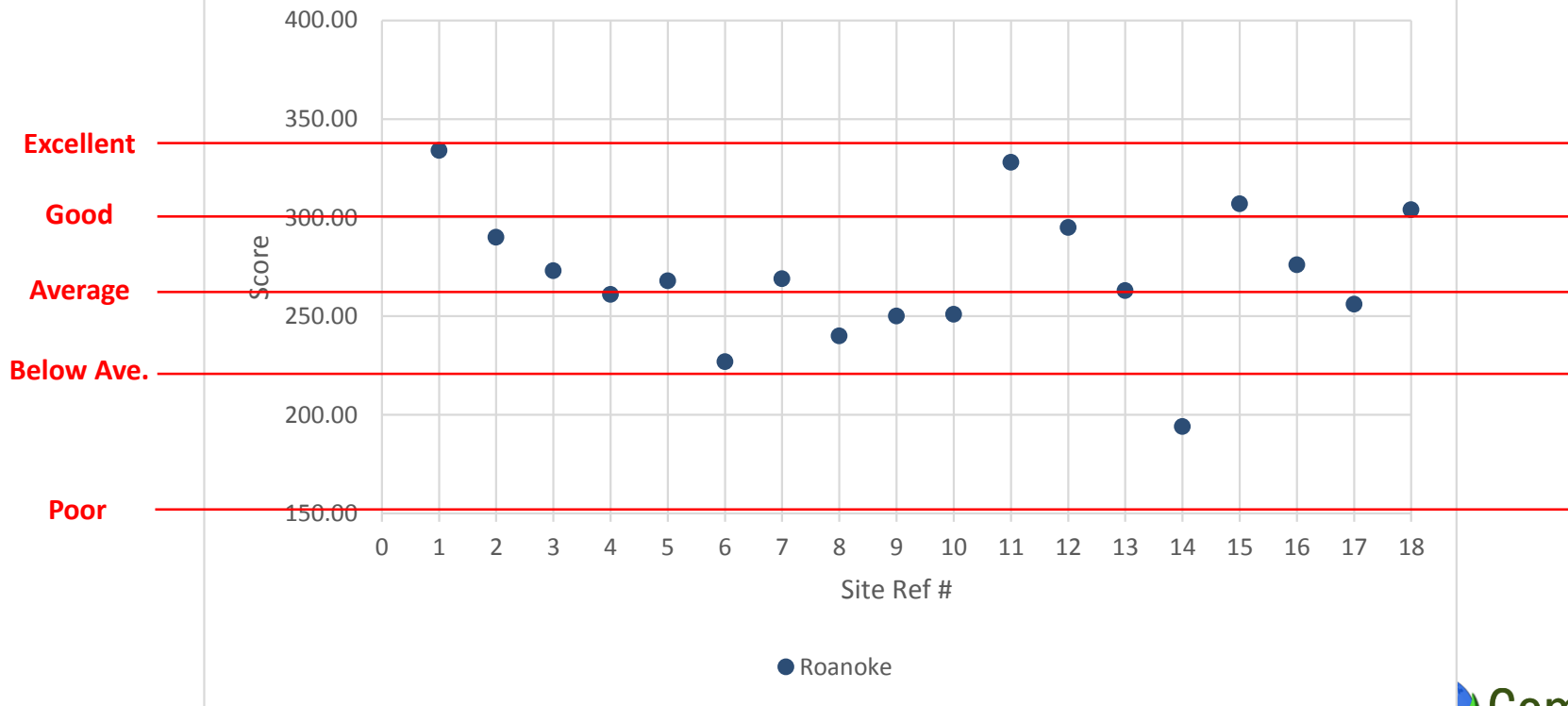
Roanoke, VA



- 18 sites

Roanoke, VA

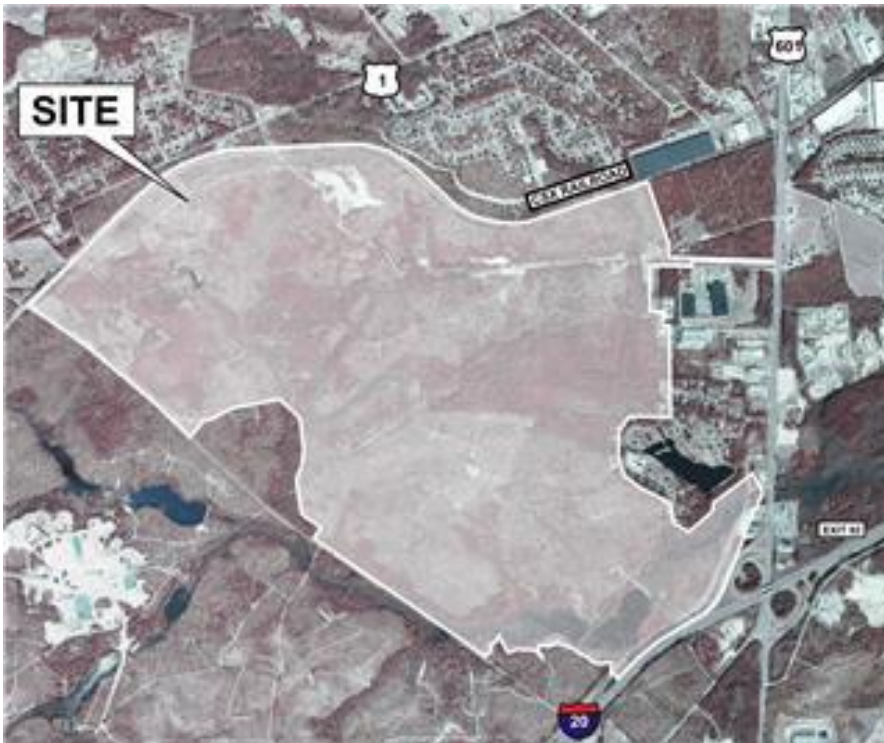
Competitor Region Site Scoring Chart



Selected Top Scoring Sites

- Columbia SC
- Nashville TN

Central South Carolina Mega Site



- 1426 acre site / “Excellent”
- Direct highway access
- All utilities at the site
- On site rail
- Due diligence studies completed including: Phase 1 & Phase 2 Environmental, Geotechnical, Wetlands Delineation, Rare Species, Archaeological
- Certified by state program

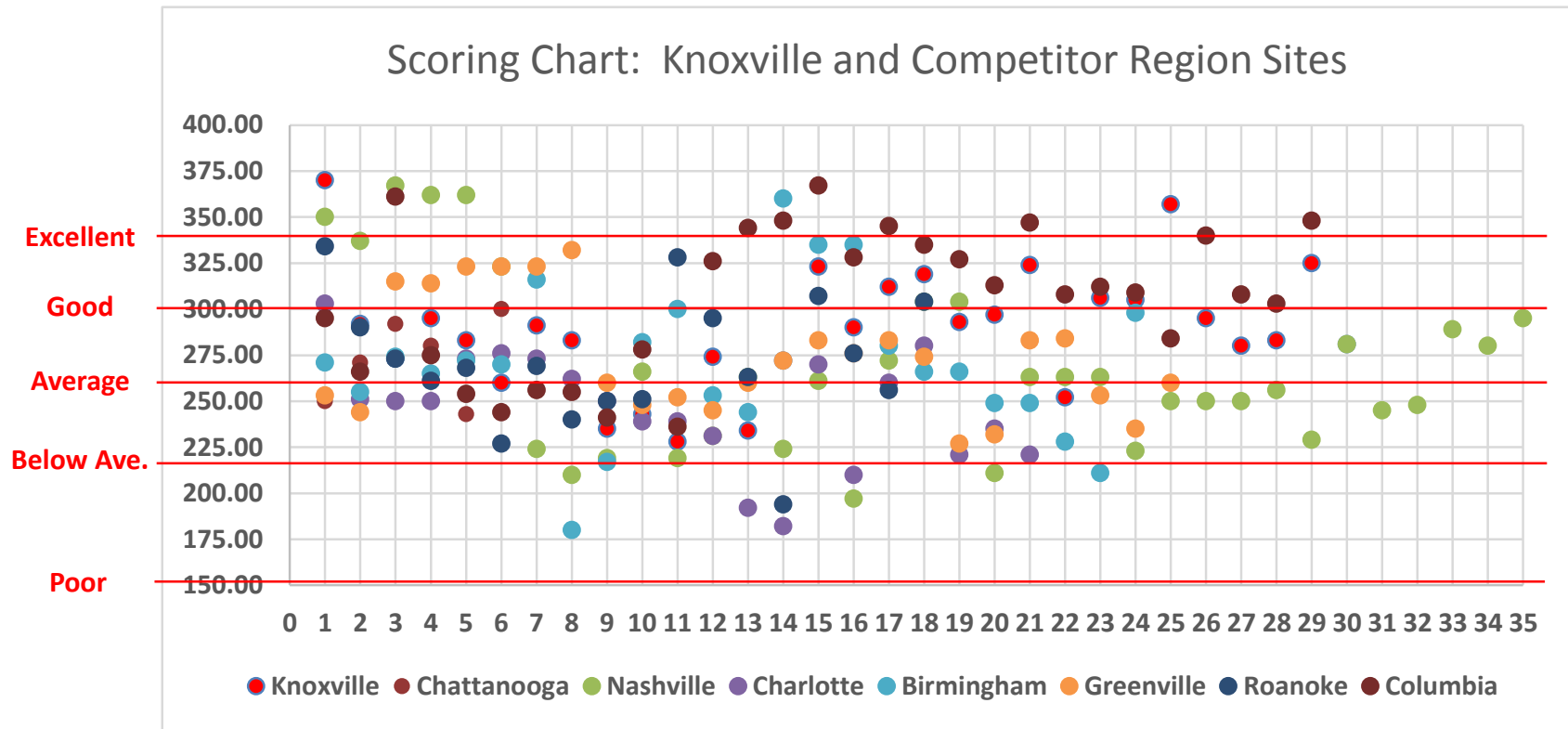
Clarksville-Montgomery County Corporate Business Park South



- 275 available acres / “Excellent”
- Direct highway access
- All utilities at the site
- Due diligence studies completed including: Phase 1 Environmental, Geotechnical, 2’ Topography, Wetlands Delineation, Rare Species, Archaeological
- Certified by Select TN program

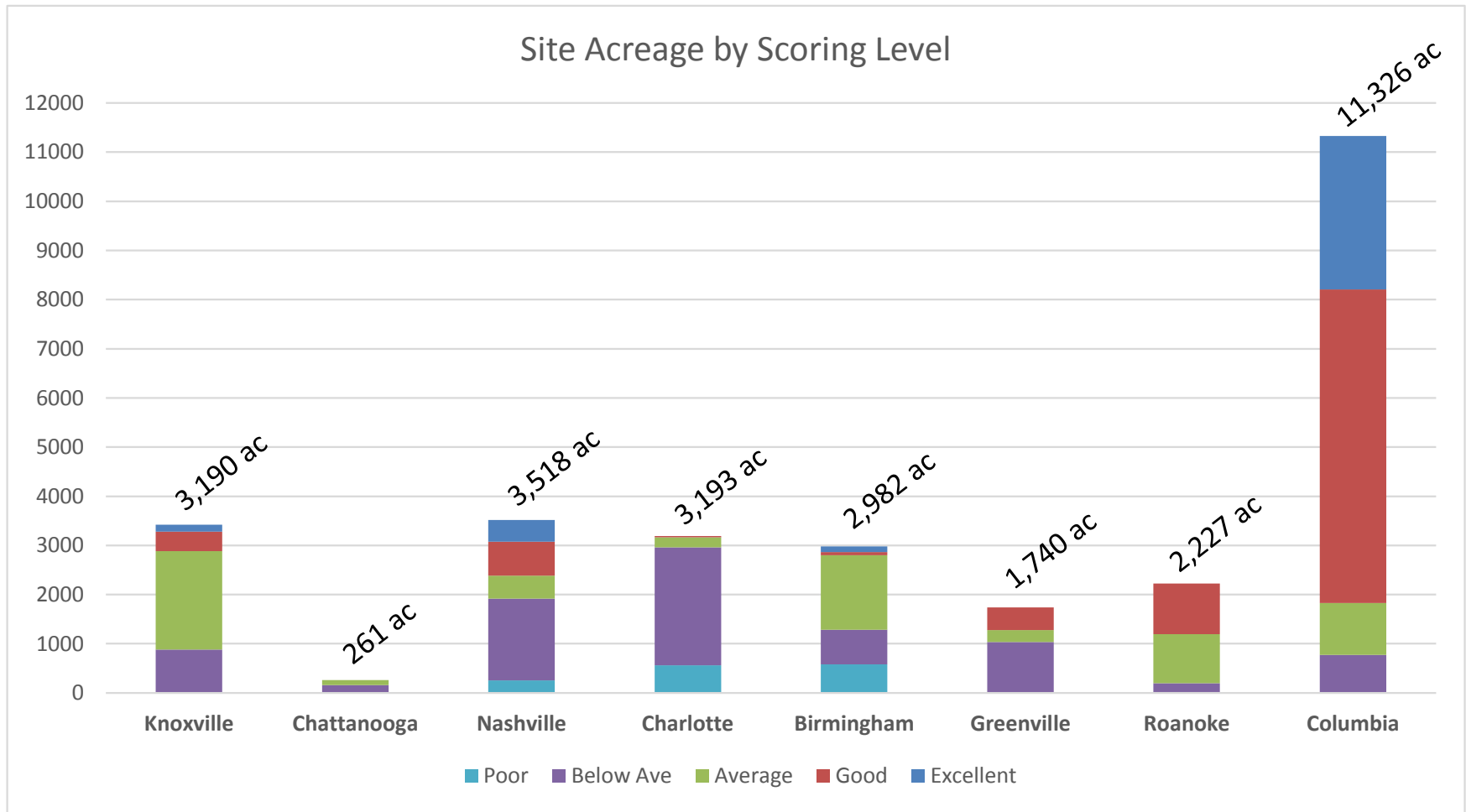
Findings and Conclusions

Scoring Breakdown - # of Sites



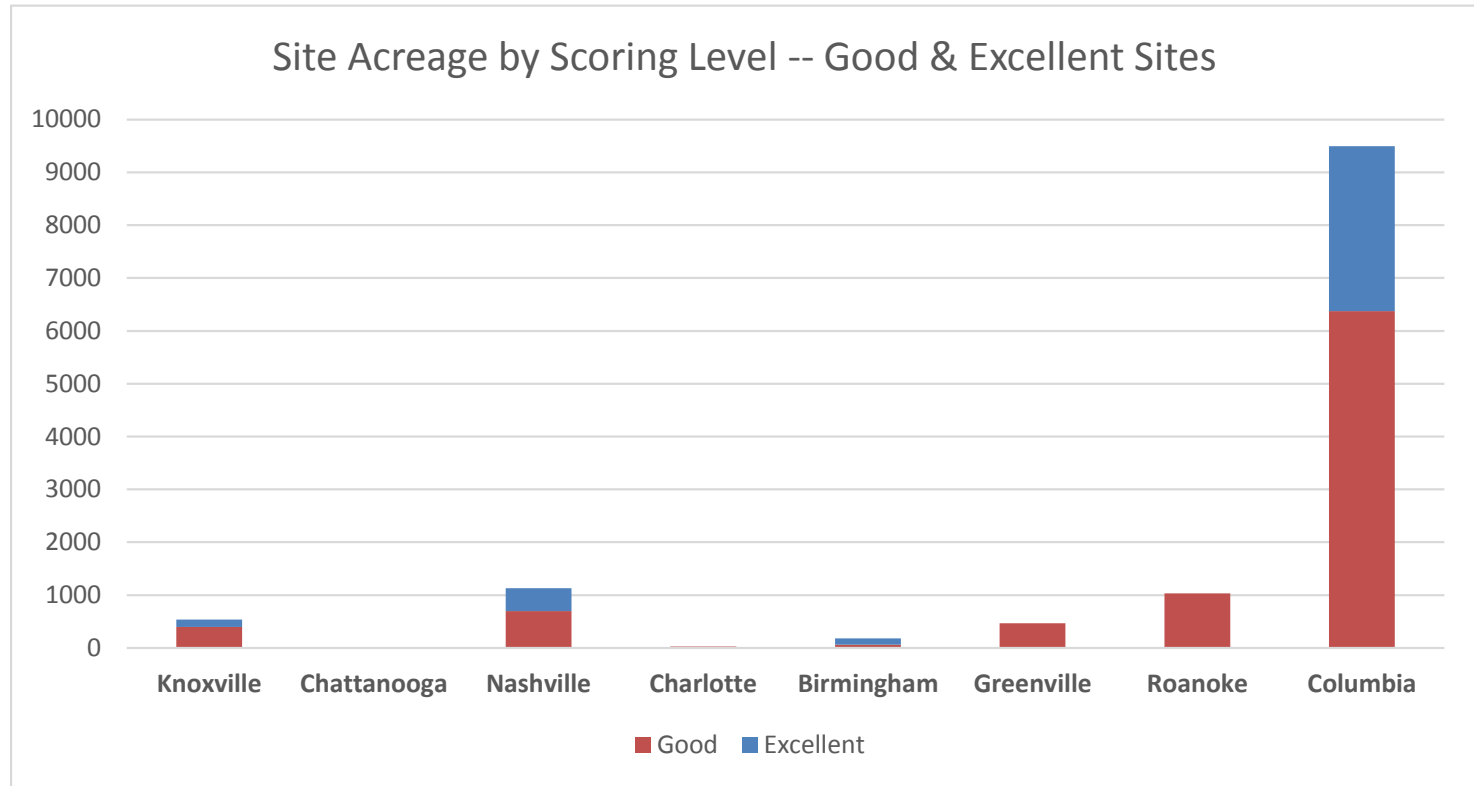
	<u>Knoxville</u>	<u>Chattanooga</u>	<u>Nashville</u>	<u>Charlotte</u>	<u>Birmingham</u>	<u>Greenville</u>	<u>Roanoke</u>	<u>Columbia</u>
Excellent	2	0	4	0	1	0	0	8
Good	7	1	4	1	4	6	4	10
Average	16	3	11	7	10	10	8	5
Below Average	5	2	11	10	6	9	5	6
Poor	0	0	5	3	3	0	1	0
TOTAL	30	6	35	21	24	25	18	29

Scoring Breakdown – Site Acreage



	Knoxville		Chattanooga		Nashville		Charlotte		Birmingham		Greenville		Roanoke		Columbia	
Excellent	142	4%	0	0%	439	12%	0	0%	117	4%	0	0%	0	0%	3118	28%
Good	397	12%	0	0%	694	20%	30	1%	64	2%	464	27%	1034	46%	6377	56%
Average	1772	56%	104	40%	467	13%	202	6%	1514	51%	244	14%	997	45%	1055	9%
Below Ave	879	28%	157	60%	1664	47%	2402	75%	708	24%	1032	59%	175	8%	776	7%
Poor	0	0%	0	0%	255	7%	559	17%	579	19%	0	0%	21	1%	0	0%
TOTAL	3190	100%	261	100%	3518	100%	3193	100%	2982	100%	1740	100%	2227	100%	11326	100%

Scoring Breakdown – Site Acreage



	Knoxville		Chattanooga		Nashville		Charlotte		Birmingham		Greenville		Roanoke		Columbia	
Excellent	142	4%	0	0%	439	12%	0	0%	117	4%	0	0%	0	0%	3118	28%
Good	397	12%	0	0%	694	20%	30	1%	64	2%	464	27%	1034	46%	6377	56%
TOTAL	539	16%	0	0%	1133	32%	30	1%	181	6%	464	27%	1034	46%	9495	84%

How does the Knoxville Region compare? – Quality of Sites

- Number vs Acreage of “Excellent” Sites:
 - Knoxville is one of four of the evaluated regions to have “Excellent” rated sites. (Columbia 8 sites, Nashville 4, Knoxville 2, Birmingham 1)
 - In acreage, this is a big difference = Columbia 3,188 ac., Nashville 439 ac., Knoxville 142 ac., Birmingham 117 ac.
- Number vs Acreage of “Good” Sites:
 - Knoxville is in the top two in terms of number of “Good” rated sites (Columbia 10 sites, Knoxville 7, followed by: Greenville 6, Nashville/Birmingham/Roanoke 4)
 - In acreage, this is a big difference = Columbia 6,377 ac., Knoxville 397 ac.; Greenville 464 ac., Nashville 694 ac., Roanoke 1,034 ac., Birmingham 64 ac.

How does the Knoxville Region compare? – Size of Sites

Number of sites by site size (minimum acreage)

Acres	<u>Knoxville</u>	<u>Chattanooga</u>	<u>Nashville</u>	<u>Charlotte</u>	<u>Birmingham</u>	<u>Greenville</u>	<u>Roanoke</u>	<u>Columbia</u>
20+	25	2	29	16	20	20	14	29
50+	18	2	13	9	12	12	7	25
100+	10	1	6	7	7	4	4	23
500+	1	0	2	1	1	0	1	8
1000+	0	0	0	1	0	0	0	3

- *Charlotte and Columbia are only regions with 1000+ acre sites*

How does Knoxville Region compare? - Marketing of Sites

- TVAsites program (tied to State ECD site and also sits on Knoxville Region webpage for sites within the region) is a best in class sites database. Features/Benefits include: ease of search, depth of information, mapping capabilities, export capabilities
 - Nashville Region utilizes same system on their website – very robust information available for many sites
 - Chattanooga does not use this on their website - lacking good information
- Central SC also has a decent sites database and depth of information, but not nearly as strong as TVAsites program.

How does the Knoxville Region compare? – Top Competitors

- Overall, Columbia and Nashville are the most competitive regions related to available site acreage and quality of the sites.
 - Columbia = 84% are “Excellent” or “Good” (9500+ acres)
 - Nashville = 32% are “Excellent” or “Good” (1100+ acres)
- Roanoke is also strong:
 - Roanoke = 46% are “Good” (1000+ acres)
- As compared to:
 - Knoxville = 16% are “Excellent” or “Good” (539 acres)
 - Greenville = 27% are “Good” (464 acres)
 - Birmingham = 6% are “Excellent” or “Good” (181 acres)
 - Charlotte = 1% are “Good” (30 acres)
 - Chattanooga = 0%

Conclusions

1. Need for more inventory in Knoxville Region
2. Need for more “ready to go” sites (raise scores for current marketed sites)
3. Need for improved presentation and depth of information on sites for marketing purposes

Conclusion #1

Need: Need for more inventory in Knoxville-Oak Ridge Innovation Valley Region.

Recommendation: Begin initiative to identify additional potential industrial sites in the region, especially those that are greater than 100 acres. Also look to identify a potential mega site in the Region. Work with land owners to purchase and/or cooperate on active listing of property.



Conclusion #2

Need: Need for more “ready to go” sites (raise scores for current marketed sites).

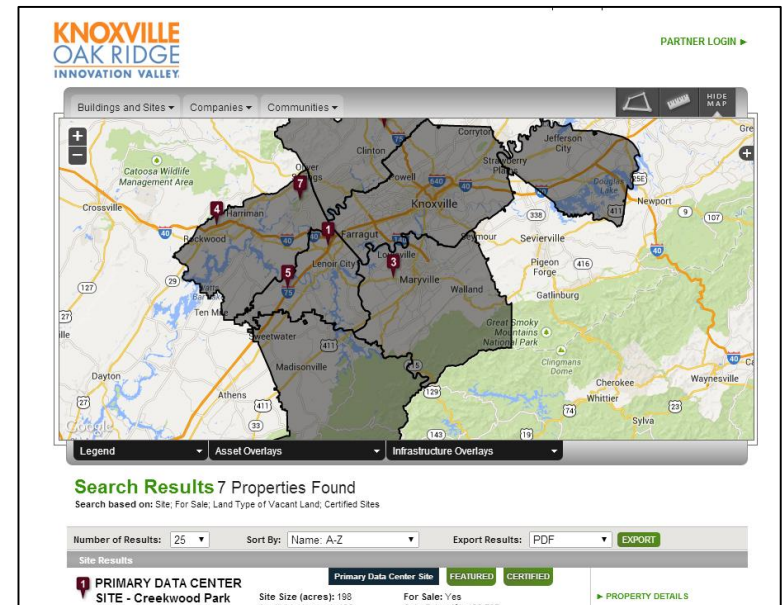
Recommendation: Identify additional prime candidates in the Knoxville-Oak Ridge Innovation Valley Region for the Select Tennessee Certified Sites program. Going through the certification process will bring readiness levels (and scores) up on current marketed sites.



Conclusion #3

Need: Improve presentation and depth of information on sites for marketing purposes.

Recommendation: Utilize Knoxville Region website (TVA platform) and populate more site information in that system. Getting information together now will save time when prospects are asking questions. Added benefit of additional marketing exposure through TVAsites website.



Q&A

THANK YOU

Michelle Comerford

Principal

Comerford Consulting Group

Email: michellemcomerford@gmail.com

Twitter: @mmcomerford

Phone: 216-973-8872

Linked In: Michelle (Marquette) Comerford

Web: www.comerfordconsultinggroup.com (coming soon!)

