

Delaware Together

Southwest Industrial Area Opportunities Assessment



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Prepared for Planning NEXT
and the City of Delaware

INTRODUCTION

This report presents findings from an Opportunities Assessment for business and real estate development in the southwestern quadrant of the city of Delaware, as input to broader economic development and city-wide planning, especially future land use planning. A Baseline Economic Assessment (Report 1) provided an overview of existing economic and real estate conditions in Delaware and the regional context. This assessment takes the analysis one step further to identify possible economic development opportunities for this sub-area. The assessment does not constitute a detailed target industrial or real estate market analysis but does provide conceptual input based on a review of the area's competitive advantages and existing conditions.

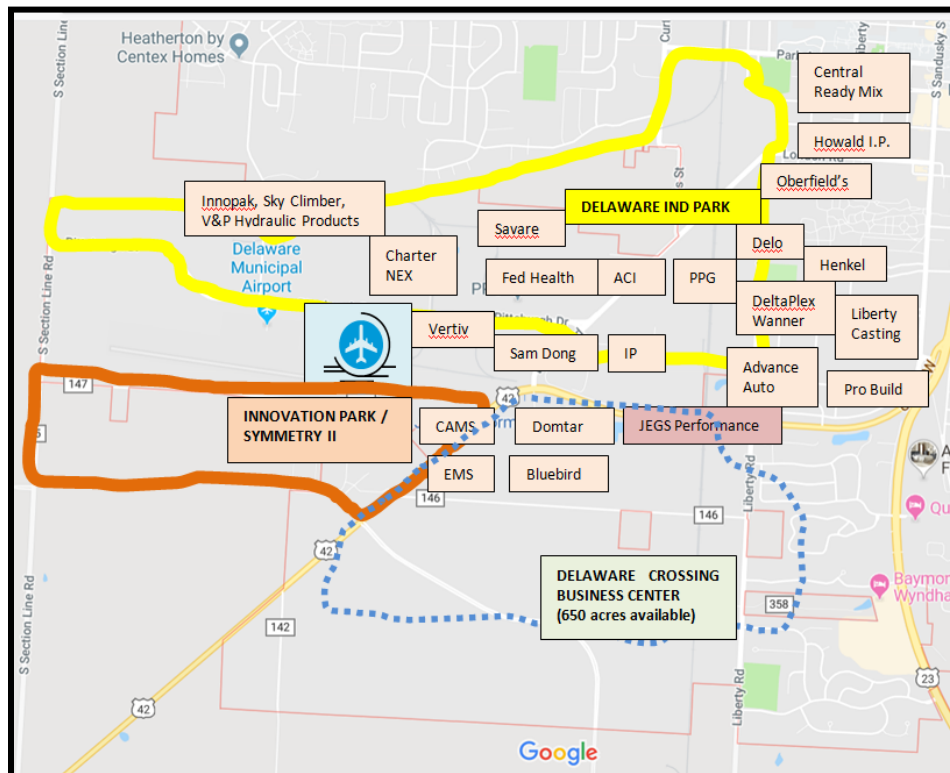
Section 1 of this report provides a review of existing conditions within the southwest sub-area, with particular attention to the existing industrial business base and business operating conditions. Section 2 provides findings from a general opportunities assessment which drew from the market overview, existing conditions assessment, and input from key business stakeholders. Section 3 applies those findings to concepts for land use and development within the sub-area, focused on refining the key economic development nodes and corridors.

Section 1. EXISTING CONDITIONS & SITE ANALYSIS

This section provides an assessment of existing physical conditions and a site analysis of the southwest area of Delaware. While other industrial nodes like the Kroger Distribution Center on the east side are critical to Delaware’s economy, this report focuses primarily on industrial areas in the southwestern quadrant of the city. The assessment examined the existing industrial business conditions and the relative competitiveness of the area for attracting and retaining industry. Existing industrial parks and industrial business areas are identified and inventoried. The business base is categorized in terms of key clusters and typologies. The Site Analysis examined factors impacting on the competitiveness of the area as a business hub. Business input on operating conditions and opportunities was gathered through surveys and interviews with area businesses. Findings from these various assessments and inputs are summarized below.

Industrial Parks & Areas

The southwestern quadrant of Delaware has three areas that are loosely categorized or marketed as the “industrial parks” delineated below: Delaware Industrial Park, Innovation Park and Delaware Crossing Business Center.



Delaware Industrial Park is the oldest and most established of these three areas. While delineated on maps, there is little visible physical demarcation or definition of this area as an “industrial park,” per se. Still, a number of the city’s large and small industrial businesses are clustered here or nearby, including Oberfield’s, Liberty Casting, PPG, ACI, Savare, ACI, DeltaPlex/Wanner, Henkel, Delo, ProBuild, Advance Auto, IP, Sam Dong, Vertiv, and Charter NEX. Also located here are newer tenants in the Delaware Municipal Airport area including Innopak, Sky Climber, and V&P Hydraulic Products. The park is generally defined for the purposes of this analysis as the “triangle” bound by Liberty Road (east), U.S. 42 / Pittsburgh Drive (south), and the railroad (north/west). This area extends along Pittsburgh Drive to Section Line Road and includes the airport.

The newer **Innovation Park** (including Symmetry II) is located on the south side of the Delaware Municipal Airport, generally bound by Airport Road (north), South Section Line Road (west), Sawmill Parkway/Slack Road (south), and U.S. 42 (east). This area has been pro-actively marketed for industrial uses and current businesses there include CAMS, EMS, Domtar, and Bluebird.

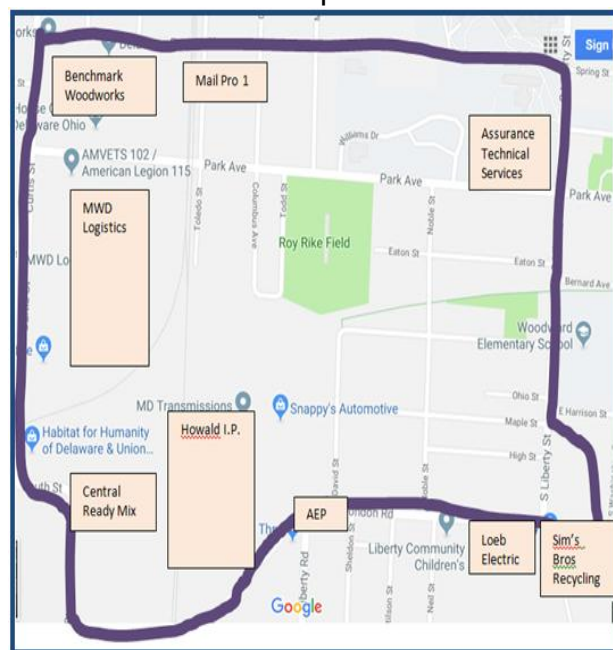
The **Delaware Crossing Business Center** is still conceptual as a future business location, with 848 acres potentially available for development on the south side of U.S. 42 (including 133 acres located in the city). The boundaries would be generally defined as U.S. 42 (north and west), Liberty Road (east), and south of Sawmill Parkway (south to Bunty Station Road). At present, the only large business operating in this area is JEGS Performance.

“Central Industrial Area”

In addition to these loosely defined industrial business parks is an undefined area of central/southwest Delaware that includes several industrial businesses and related activities plus a residential neighborhood that has probably housed workers in area industries.

This area is roughly defined as bounded by West William Street (U.S. 36, on the north), Curtis Street (west), London Road (south), and South Liberty Street (east).

Among the businesses in or near this area are Central Ready Mix, tenants in the Howald Industrial Park, AEP, Loeb Electric, Sims Brothers Recycling, MWD Logistics,

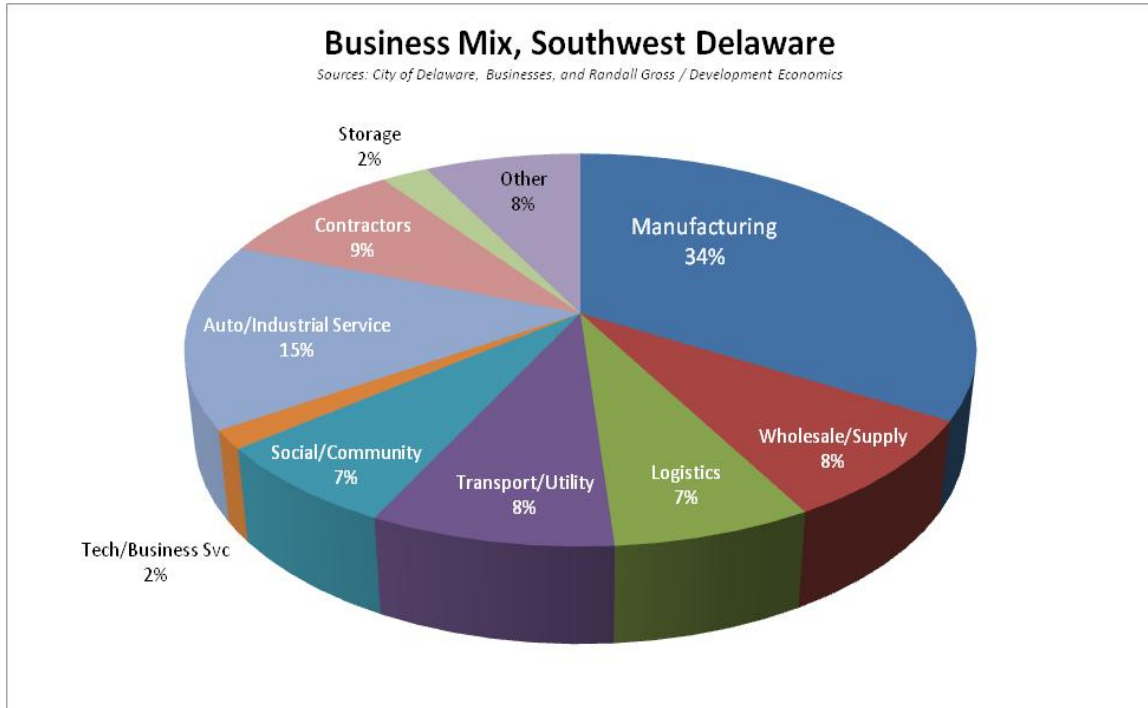


Assurance Technical Services, Mail Pro 1, and Benchmark Woodworks, among others.

Inventory & Business Base

An inventory was conducted of existing uses within this area, with a focus on industrial and other businesses. The inventory identified approximately 130 diverse businesses, with the largest share (34%) being in manufacturing.

Chart 1



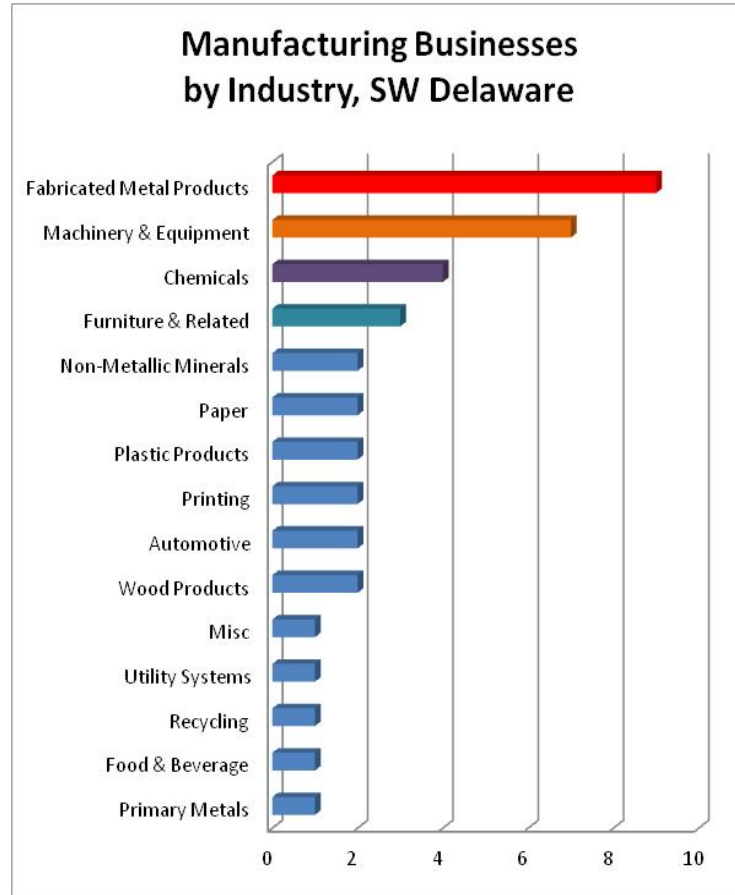
About 15% are in automotive and other industrial services, comprising the second-largest group of businesses. There are a similar number of contractors, wholesale suppliers, transportation & utility companies, social & community service providers, logistics companies, and other businesses, each comprising approximately 7 to 9% of the total. There are also a handful of technical/business service companies and storage services. Overall, the area can be characterized as being a manufacturing center, with ancillary transportation, supply, and industrial service providers.

Manufacturing

The manufacturing base occupies a total of 3,034,800 square feet of space, based on data collected by the City of Delaware. This manufacturing base represents about 3,000+ employees and includes nine of the city's 12 largest employers. Major manufacturing employers include Domtar, PPG, Vertiv, Midwest Acoust-A-Fiber, Liberty Casting, International Paper, and Sam Dong.

The manufacturing businesses were further disaggregated by industry, as summarized below.

Chart 2

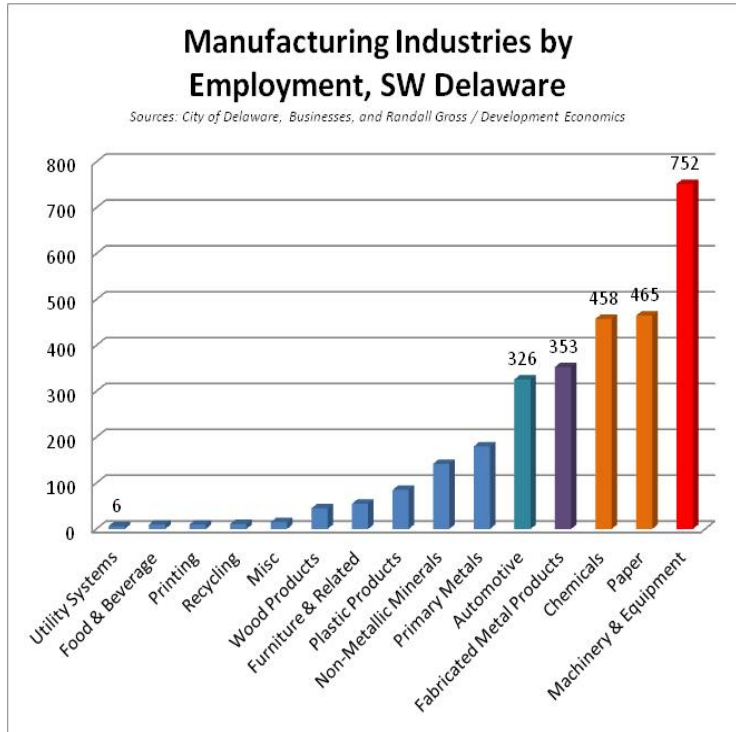


The largest number of manufacturing businesses is engaged in producing fabricated metal products, followed by machinery & equipment and chemicals. Among the industries represented by at least two or three companies in this area are furniture/related, non-metallic minerals, paper, plastic products, printing, automotive, and wood products. There are also a handful of companies in other industries including utility systems (design and installation), recycling, food & beverage, and primary metals, among others.

These companies produce a very diverse selection of specific products ranging from personal hygiene products to chicken pluckers: *Millwork, Hygiene Products, 3-D Printing, Polyethylene Films, Chicken Pluckers, Adhesives, Signs, Ice, Machine Parts, Aggregates, Heat Exchangers, Cardboard, Paints, Portable Water Systems, Hydraulic Cylinders, Floor Molding, Heat Exchangers, and others.*

Employment in the area’s manufacturing industries is concentrated in the production of machinery & equipment, with more than 750 employed in that industry. Close to 500 each are employed in paper and chemicals production.

Chart 3



Another 350 are employed in producing fabricated metal products and 330 in the automotive industry. More than 100 employees work in each of primary metals and non-metallic minerals, but less than 100 work in most of the other industries.

Transportation & Logistics

The southwest area is also home to several transportation hubs and transport-related businesses. Delaware Municipal Airport provides an anchor for the area, with Jetstream, Spencer Aviation, and Shamrock Air Service among the associated service providers. A master planning process is underway for the airport. Delaware Area Transit Authority (DATA) is also based in this area. Transport-related businesses include Delaware NEX Transport, Henderson Trucking, U-Haul, Buckeye Coach, and others.

Distribution. There are several distribution companies in the area, occupying a total of 1,508,000 square feet, based on the City’s data. These companies employ about 1,660 and include Advance Auto Parts Distribution, JEGS Automotive (a mail order/Internet seller/distributor of automotive parts with

a 350,000 square-foot warehouse), Wanner Metal Worx, MWD Logistics and others.

Wholesale Trade / Supply

Wholesale trade and supply businesses in the area supply a mix of electrical equipment, geo-tech products, carpet & flooring, industrial chemicals, dental supplies, water softener equipment, and other products.

Site Analysis

Field reconnaissance and a site analysis were conducted to assess the area's physical conditions and general marketability as an industrial business location. Key observations from this analysis are summarized below.

Delaware Industrial Park & Central Industrial Area

These older industrial areas generally lack physical definition and pro-active marketing oriented to their specific competitive advantages. The "Central Industrial Area" around Liberty, London, and Curtis in particular lacks any definition as a designated and programmed industrial node. There are several aging multi-tenant industrial facilities in this area that appear to have declining appeal to companies seeking affordable but high-quality space.

Some of the area seems an odd mix of agricultural land with a rural character, factory housing, and spotty site-specific industrial development. There is undeveloped land but arranged in a somewhat inefficient and piecemeal patchwork, and much of this land is not available for sale. There is generally a lack of transition between industrial and non-industrial uses. As an investor, it would be challenging to determine how and where to develop within this context.

Pittsburgh Drive has provided an attractive gateway and has succeeded as an industrial location for high-profile global brands like PPG and International Paper, but its traditional "pad" site development format is largely built-out and favors "drop in" industrial development that may not fit the model for how most light industrial companies seek space in today's market. Many companies are looking for industrial space with flexible fit-out that is ready for move-in, rather than greenfield sites to construct large, purpose-built manufacturing plants.

Innovation Park/Symmetry

The newer industrial development areas south of the airport have also succeeded in attracting businesses. But the area generally lacks amenity value and such issues of character and amenity environment may impact on the long-term marketability of the area to firms that need to recruit workers from outside of the city. Like Pittsburgh Drive, this area is being developed in a way that is

consistent with the traditional “industrial park” or suburban business park model with separated pad sites for businesses and a lack of walk-able amenities for workers. Such amenities could include restaurants, breweries, personal services and other businesses to serve the needs and lifestyle of workers.

Delaware Municipal Airport

The airport is an important asset within the Columbus region, providing opportunities as an amenity for various types of businesses. Jim Moore Field is home to approximately 100 aircraft and handles about 40,000 operations per year on its 5,800-foot runway. According to the City’s web site, the field’s Wide Area Augmentation System (WAAS) is among the several aviation upgrades including terminal and lounge improvements that have enhanced the airport’s capacity for diverse operations and improved comfort for users.

Access Challenges

While the southwest area offers transportation access through a general aviation airport and several federal highways (U.S. 42, U.S. 23, and U.S. 36), as well as the new Sawmill Parkway, it is poorly located to provide direct access to the interstate highway system. This issue alone limits the area’s capacity and marketability for distribution and manufacturing uses that are highly dependent on just-in-time delivery. That being said, access to Interstate 71 is within nine to ten miles or 25 minutes, which can provide some benefit.

The area also lacks direct access to executive and middle-management housing, which will be important in attracting companies to this part of Delaware. Certainly there is housing for young families and workers to the north and south-east of the area, but there are limited opportunities and amenity-rich communities for higher-level management within a short drive. At the same time, Dublin and southern Delaware County are located within a relatively short commute. Ultimately, however, having housing for executives in Delaware can help enhance the likelihood that they will locate their business there.

Business Input

Surveys and interviews were conducted to gather input from a sample of businesses on the challenges and opportunities relating to a Delaware location (with particular attention to southwest Delaware). The general consensus was that Delaware provides several advantages relating to location (centrally located within Ohio and the north Columbus area) and affordability (relatively low real estate costs compared to other areas closer in to Columbus). But Delaware lacks the necessary labor pool (un/semi-skilled and skilled production workers) to support significant industrial growth. Key issues relate to the lack of amenities, housing, and the environment that is created around industrial zones for attracting workers to Delaware.

Delaware as a Location

Representatives of the area's industrial companies were asked why they located in Delaware. In general, they either started the business there or purchased an existing plant in Delaware (so it was already there). Some of the businesses consolidated existing business in Delaware that had been in several locations (including Delaware) before. Finally, some businesses noted that Delaware is proximate to their client or customer base, such as the Honda plant in Marysville.

Key Factors in Location Decisions

Business representatives listed the key factors they have considered in their location decisions. Among them are location and market access, access to low/semi-skilled labor, low operating costs & taxes, and safety & security. They perceive that Delaware ranks fairly high on all of those factors with the exception of access to a large labor pool.

Growth Plans

About 30% of the surveyed and interviewed companies had plans to grow their labor force, as of spring 2019. Trade and other factors placing pressure on the manufacturing sector in the current market may have pushed that number down since that time.

What Assistance Could Help Local Businesses?

Business representatives agreed that more job readiness and basic life skills training is needed to enhance the local labor force's employability. Given the tight labor market and the lack of a large labor pool in Delaware, employers are trying to locate workers who meet the basic standards of showing up on time for work, prepared and ready to work. There was also a need stated for better transit or public transportation to get workers to their places of employment. Also mentioned was a need for more affordable workforce housing to attract and retain quality workers in Delaware.

Southwest Industrial Land Use

Finally, business input was sought on how best to plan for industrial business development in southwest Delaware. On this point, there appear to be two opposing minds. One group felt that there is a need to "encourage development of distinct nodes based on the character of the use for marketing and industrial development purposes." The examples that were given included some sense of marketing and physical definition for tech uses, heavy manufacturing, and a "commercial / light industrial mix."

Another group felt that there is a need to “keep all industrial areas exclusively for industrial uses,” and not let infiltration of mixed-use into the industrial zones. It may be that these two thoughts are not mutually exclusive, since there can be sub-areas that are oriented more exclusively to heavy and “noxious” industries that may otherwise have a negative impact on other types of uses. This separation of noxious uses is, in fact, how zoning originated in the United States. Ultimately, representatives of diverse businesses agreed that there is a need for more physical definition for industrial business areas in southwest Delaware, whether for marketing, investment, or separation of certain uses.

Section 2. OPPORTUNITIES

This section provides input on conceptual opportunities for economic development within the southwest portion of Delaware. Identification of opportunities was based on the economic and real estate baseline analysis, site assessment, review of the existing business base, stakeholder input, and the prior target industries identified for the city of Delaware as part of the 2014 Delaware Economic Development Plan.

Current Target Industries

(2014 Delaware Economic Development Plan)

The 2014 *Delaware Economic Development Plan* identified primary and secondary targets for business recruitment and retention in the city. The primary target industries were mainly focused on targeting jobs for residents of Delaware based on their skills and the need to reduce commutation out of the city. Among the primary targets were “boutique” manufacturers; research & development; other professional, scientific & technical services; finance & insurance; wholesale trade; and information services.

Secondary targets were also identified, mainly as an approach to fill the gap in available jobs in Delaware in these sectors. The secondary targets identified in the 2014 *Plan* included retailers and arts, entertainment, and recreation employers.

Airport – Related Economic Development

There is also an opportunity within the southwest portion of Delaware to focus on the airport as an asset for attracting business to the area. Certain types of economic activities are attracted to locations near general aviation airports. These activities are discussed below as a basis for planning and economic development associated with the airport and surrounding areas.

Extensive and Immediate Travel Needs

Certain types of companies have management and employees with extensive and immediate travel needs that are met through direct proximity and access to private planes. Among the types of companies that form a target base for recruitment in southwest Delaware could be the following:

- Consulting, law, medical, advertising, and financial services firms
- Transportation services companies
- Agri-businesses

- Executives and boards of manufacturing companies, particularly those engaged in electronic equipment manufacturing, miscellaneous machinery manufacturing, and other selected industries.

High-Attention Marketing

Certain firms require a high-level of personalized attention for their clients as well as frequent visits by clients and potential customers. These firms have a high demand for private, general aviation services.

General Aviation Freight

There are several types of manufacturing companies that tend to utilize the services of general aviation airports on a regular basis because of the type of product or specific requirements for distribution. The factors and types of manufacturing businesses associated with high general aviation freight use are the following:

- Critical Needs: Medical emergencies and supplies
- High-Value Product: High-tech electronic equipment & parts, medical equipment, precious stones
- Perishables: Seafood, fruit

Objectives & Opportunities

Several objectives have been defined for economic development within Delaware and the southwest area of the city, and matching opportunities are identified that respond to those objectives. As noted earlier, the City has already identified target industries, so this effort is meant to refine and append those opportunities that may be best suited to the southwest portion of the city.

Diversification

There is a need to diversify the city's economic base and the business base within the southwestern portion of Delaware. Diversification and balance helps reduce or mollify the impacts of a downturn in any one sector. Diversification can also lead to collaboration and new product development, where diverse companies work together to share technologies for example on open platforms. Key to Delaware's diversification is to build on the city's existing strengths. Those strengths include its central location and its clusters in **transportation** and **construction**. Also a key strength is Delaware's **airport** as a marketing anchor for recruiting the types of businesses identified above that are attracted to general aviation airports. Enhancing the airport's services and "perks" for patrons will increase its competitiveness and thereby, the business recruitment potential for southwestern Delaware. This concept is developed further later in this report.

Also important to diversification is the need for collaboration, including institution building and partnering among and between businesses in the area. Creating a southwest Delaware business consortium that promotes cross-pollination of ideas between businesses will be helpful. Finally, there is the opportunity for more interaction between consumers and production, such as through food & beverage as well as the “maker” culture that brings an audience and consumer appetite for local products.

Recruiting Resident Employers

The 2014 *Plan* initially identified a need to recruit businesses that employ local residents, since there is significant out-migration of residents and reverse in-migration of workers to Delaware (as noted in the Economic Baseline Assessment). Based on the Baseline Assessment, several specific industries are recommended to augment the target industry effort, including the following:

- Management Services
- Scientific & Technical Services, with a more specific emphasis on Industrial Testing, which could be recruited to the southwest area.
- Finance & insurance back office processing and services

Strengthening Brand & Identity

There are opportunities to enhance recruitment power by strengthening the southwest area’s brand and identity. A key element of this strategy would be to define and delineate districts and nodes. Also important is to enhance amenity value and create more “cache” for the location. Finally, implementation of Delaware’s existing *Branding & Wayfinding Strategy* will help reinforce these efforts.

Section 3. DISTRICTS, CORRIDORS & NODES

Based on the site analysis, input from businesses, and opportunities assessment, it was determined that there is a need to define specific districts and nodes for industrial business development. Strategic recommendations are therefore made for physical definition as well as marketing concepts for several sub-areas within the southwest portion of the city. Specific recommendations are made for the Delaware Industrial Park, the Central Industrial Area, and the Sawmill District (Delaware Crossing), as defined earlier in this report.

Strengthen Delaware Industrial Park

Several strategies are recommended for strengthening the area defined as the Delaware Industrial Park in southwest Delaware. The following strategies relate to general branding; to physical improvements that help to define the area, site assemblage and creating amenity value, and to establishing a Delaware “Concierge” Airport Hub.

Branding

First, it is recommended that the area be branded and marketed in association with the transportation and electronics industrial sectors, since these sectors are represented by clustering that suggest a competitive advantage for the area in attracting those industries.

Nodes, Gateways and Physical Improvements

It is recommended that commercial/mixed-use nodes be defined and strengthened along London Road at the intersections with Pittsburgh Drive and at U.S. Highway 42 West. These nodes can help focus attention so that the area does not seem as disparate and ill-defined. Ultimately, London Road is the main industrial artery through this area, and every effort should be made to enhance the image along this corridor. London Road should have the same character, or at least a character and image that is equally attractive, to Pittsburgh Drive. Creating a sense that one has entered a more deliberate, master-planned industrial area, would help enhance the image of this corridor and the industrial sites and buildings adjacent to it. Gateway features and signage should be unique and consistent within the Delaware Industrial Park area, especially along London Road and within the nodes. Landscaping and moderate buffering at the right locations (such as between heavier industrial and residential uses) would help “upgrade” the image of the area and enhance the overall aesthetic context.

Assemble Sites and Create Amenity Value

As noted earlier, large portions of this area seem to have no coherent land use pattern, with agricultural and undeveloped land mixed haphazardly with industrial buildings, worker housing, and occasional commercial uses. It is recommended that the City consider working with property owners to facilitate a collaborative, shared-equity based site assembly strategy among private property owners that helps to create a more coherent collection of parcels for development or redevelopment.

The City could offer to examine the market and investment potential for use of these sites and to develop a request for proposals from developers on behalf of the owners, who could work in a shared equity arrangement with a prospective developer or user. The City and its Economic Development office would also help work on an infill development strategy focused on recruiting compatible uses along London Road. As part of this strategy, the City would work to define heavy industrial areas that are protected from encroachment through zoning and other regulatory mechanisms.

The City would also work with non-profit partners on projects as recommended in this comprehensive plan that help to create amenity value through delineated greenways and fitness trails, anchored by the new YMCA.

Establish Delaware Concierge Airport Hub

There is the opportunity, as identified in the previous section, of establishing a “Concierge Airport” hub associated with Delaware Municipal Airport. There would be more focus on providing corporate and personal services as part of this concierge concept that would appeal to the target clientele identified in the previous section. For example, a partnership would be formed with the nearby YMCA to provide member access to fitness facilities for those using the airport. On-site business and personal services would also be made available that are targeted to companies using the airport facilities.

The City’s Economic Development office would examine opportunities for creating transportation, construction, and electronic equipment manufacturing and distribution clusters relating to recruitment of airport-dependent businesses. Economic Development would also identify institutional, government, and corporate partnerships in establishing technology anchors such as an incubator, associated with the airport. Again, the focus of the anchor would be to recruit entrepreneurs and small tech businesses in the transportation, construction, electronic or medical equipment arena that could be nurtured locally and graduate into larger spaces in the industrial park.

Redefine Central Industrial Area As Mixed-Use Urban Industrial District

The central industrial area, as defined in this report, is the least defined of the existing industrial zones within the southwest area of the city. Here is an opportunity to create a more urban, mixed-use industrial district that provides amenity value and positively impacts on the surrounding residential neighborhoods. Key components of the strategy for this area including the following:

Create Area Master Plan

This area could be master planned as a distinct neighborhood, including a vision for infill development. The master planning effort would work to reduce conflict between uses while enhancing the overall aesthetics and amenity value of the area.

Corridor Streetscape Improvements

As part of the master planning effort, streetscape improvements would be integrated that would enhance the aesthetic appeal of the area. Streetscape efforts would be focused in the London Road Corridor to Sandusky Street, and along Curtis Street.

Integrate New Uses at Key Nodes

Protect industrial use but integrate commercial and residential where appropriate to create mixed-use environments. This area is relatively close into downtown Delaware and could become one of the city's exciting, mixed-use urban neighborhoods. New uses would be concentrated in a "signature" mixed-use node located at London Road and Liberty Road. The Howald Industrial Park would be redeveloped for mixed-use. There is a sizeable, undeveloped parcel at the front of Howald I.P. that could be developed as part of the initial phases of a mixed-use development at this node. The market to support such development would need to be tested.

One of the possible opportunities for integrating commercial / industrial "maker" uses into this area would be through food & beverage facilities including a brewery or distillery. A brewery, along with restaurants, could help establish a hub for residents and workers in southwest Delaware and could also attract other consumers from throughout the city and beyond. There is also the opportunity to integrate rental apartments or other residential into these mixed-use nodes, as tested though the residential market analysis and discussed in Report 3.

Convert Office to Maker/Tech Space

Low-performing office space in the area might be converted to use by makers, small tech firms, and entrepreneurs. This space might provide an opportunity for move-up among incubator firms or small companies looking for affordable start-up space in the area, including those originating in other parts of the northern Columbus market. Again, having amenities like a brewery and restaurants will help in marketing this space and the area in general as a location for small start-ups, makers, and entrepreneurs.

Establish Master Plan for Sawmill District (Delaware Crossing)

The Delaware Crossing Business Center or Sawmill District should be master-planned to help guide development and provide investors with a vision for the area. As a framework for planning, this area has been disaggregated into three sub-sections and described in terms of their marketability for various uses. The three sections include the area West of U.S. 42, an “Amenity Node” located at Sawmill Parkway and U.S. 42 West, and East of U.S. 42.

West of U.S. 42: “Tech/Industrial”

The area west of U.S. 42 is already developing as a mini-business park area, incorporating Innovation Park and Symmetry II. There is an opportunity to build on the industrial technology testing cluster and to promote advanced manufacturing in this area. The area could benefit from branding and services associated with the “Concierge Airport” concept, since it is situated adjacent to the airport property and could potentially offer a south entrance to the airport.

“Amenity Node” at Sawmill and U.S. 42 West

Development of a mixed-use node at Sawmill Parkway and U.S. 42 West is recommended to provide amenity value to this southwestern “corner” of the city in support of both residential and economic development. A mixed use node at this location would also provide a southern “gateway” into the city’s industrial business area. The node would offer convenience and shopper’s goods retail, personal services, and restaurants if proven to be supported by the market. There is also the possibility of integrating workforce residential development into the node and establishing an attractive environment that would attract workers to live in the area.

East of U.S. 42 “Corporate” Corridor

The portion of the Sawmill District east of U.S. 42 would have a more “corporate” business park character, although it would still accommodate a mix of industrial uses. The City would help facilitate site assembly by working with area property owners, similar to the effort recommended in the Central Industrial Area. Light manufacturing and back office administrative service uses would be among the types of businesses recruited to this area. Recruitment targets would include management consulting services in human resources, marketing, and process management; as well as firms engaged in logistics and associated consulting, consistent with the types of companies likely to locate near a general aviation airport. The district would have consistent character and design throughout, with branded elements and marketing.

Summary

The southwestern portion of Delaware is dominated by industrial uses, which fan out from downtown along U.S. Highway 42 West and nearby streets. Older industrial areas within the “Central Industrial” triangle formed by London Road, Liberty Road, and U.S. 42 accommodate a handful of heavy industrial facilities alongside residential neighborhoods and under-utilized buildings and land. The Pittsburgh Drive corridor succeeded as a suburban-style industrial park that is now largely built-out with large, single-use buildings. The growing Delaware Municipal Airport anchors this corridor. Newer areas south of the airport have attracted several light industrial uses. JEGS placed its headquarters south of 42 and plans for land along Sawmill Parkway have envisioned more industrial development further south.

The competitiveness of southwest Delaware has changed over time as interstate highway access has attracted industrial development away from older highway corridors like U.S. Highway 42 West. That being said, Delaware’s growing airport and Sawmill Parkway provide opportunities for attracting businesses through higher-value environments and amenities. This report has recommended strategies for creating more amenity value through development of mixed-use nodes and residential uses along Sawmill Parkway, and by focusing amenity-based marketing for tech and high-value industrial uses near the airport. Meanwhile, recommendations are also made for infill and redevelopment of older buildings and land within the Central Industrial area of southwest Delaware. The older areas near the city’s core provide an opportunity for recapturing a more “urban” mix of maker space, emerging tech uses, residential, and retail that could attract younger workers to the area. Companies tend to follow the work force in a tight labor market, so attracting a young workforce helps in securing opportunities for business development.