



2023 ANNUAL REPORT



GROWTH AND DEVELOPMENT TRENDS IN THE CITY OF PALM COAST

COMMUNITY DEVELOPMENT DEPARTMENT



2023 ANNUAL REPORT



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SECTION 1: OVERVIEW

INTRODUCTION

The Community Development Department has prepared this annual report in order to summarize growth and development trends occurring in the City, and also better project growth in the future. In addition, this annual report is provided to both public and private agencies in order to better coordinate future growth with infrastructure needs and services.

The majority of data displayed in this report is orientated to traffic analysis zones, or TAZs, which are the smallest geographic units that the City tracks for growth data and are utilized in the City's transportation modeling efforts. Building permits, Certificates of Occupancy, and development approvals (in the form of Final Plats, or Development Orders) are tracked and referenced to TAZs by the Community Development Department. Each TAZ is numbered on the maps and throughout the report will be referenced for the reader's benefit and use.

GENERAL DEMOGRAPHICS

A comparison of the 2010 and 2022 demographics using the 5-year American Community Survey (ACS) is provided below. A comparison between the 2010 ACS and the latest 5-year ACS shows that the percentage of total population under 18 years of age in the City decreased while the percentage of total population over 65 years old increased. This is reflected in the increase in median age from 44.4 years to 50.3. Overall, the City continues to age and tends to be older than the average for the State of Florida in terms of median age and percentage of population 65 years and older.

FIGURE 1.1 — GENERAL DEMOGRAPHICS TABLE

	City of Palm Coast 5-Year American Community Survey (2006-2010)	City of Palm Coast 5-Year American Community Survey (2018-2022)	Florida 5-Year American Community Survey (2018-2022)
% of Population Under 18	21.30%	17.6%	20.0%
% of Population 65 Years and	21.8%	29.5%	20.9%
Median Age	44.4	50.3	42.4
Average Household Size	2.6	2.52	2.53
Median Household Income	\$48,042	\$68,824	\$67,917
Per Capita Income	\$23,044	\$37,904	\$38,850
Families Below Poverty Level	8.70%	7.30%	9.1%
Household Units	27,184	35,961	8,353,441
Tenure of All Occupied Housing Units (Owner Occupied)	79.6%	77.9%	66.9%

POPULATION ESTIMATES / PROJECTIONS

The Bureau of Economic Business Research (BEBR) provides population estimates of the City's population every April 1st. Based on these estimates, the City's population grew by over 18% between 2019 and 2023 (See Figure 1.2).

FIGURE 1.2 — BUREAU OF ECONOMIC BUSINESS RESEARCH POPULATION ESTIMATES AND GROWTH

	2019	2020	2021	2022	2023
Population	86,768	89,258	92,866	96,504	101,737
Growth Rate	2.59%	2.87%	4.04%	3.92%	5.42%

RATES TABLE

Based on the BEBR population projections for Flagler County, the City can generate population projections as a share of the County projections. The population projection indicates that by 2050, the City's population will grow to about 161,498 (approximately 79% of the total Flagler County population). This is based on a population projection using an average of the Medium and High Population Projections. These projections will be updated when BEBR provides an updated population projection. These projections are based on BEBR projections as noted in the footnote below (See Figure 1.3 and 1.4 below).

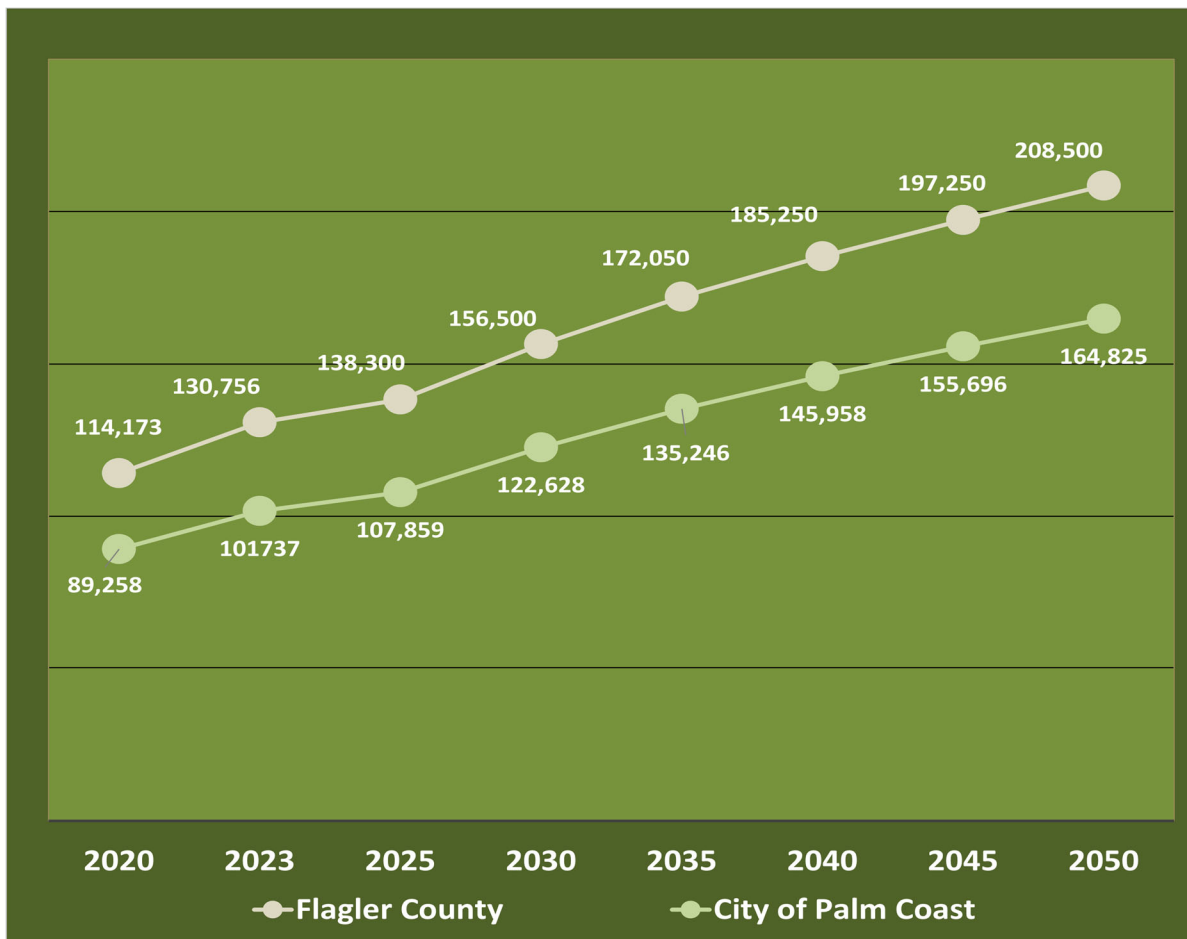
FIGURE 1.3 — BEBR POPULATION PROJECTIONS TABLE (WITH 5-YEAR GROWTH RATES)

	2020*	2025	2030	2035	2040	2045	2050
County Population	114,173	138,300	156,500	172,050	185,250	197,250	208,500
City Population Projec-	89,258	107,859	122,628	135,246	145,958	155,696	164,825
City Growth Rate		20.84%	13.69%	10.29%	7.92%	6.67%	5.86%

*2020 U.S. Decennial Census

**University of Florida, Bureau of Economic and Business Research, Florida Population

*** Assumes % of total Flagler County Population Growth Projection



SECTION 2: RESIDENTIAL DEVELOPMENT

CONSTRUCTION COMPLETED

The Building Division of the Community Development Department issues and tracks Certificates of Occupancy, or “COs” for residential construction projects. COs indicate that a residential construction project has been completed and is ready for occupancy.

During the past year a total of 2,640 dwelling units were issued a CO, this total is a 60.6% increase from 2022. The significant increase in the number of new residential units came from the various types of housing units, including the completion of 300-unit apartment complex (Pointe Grand), a 66% increase in the number of duplex/townhome units, as well as a 38% increase in new single-family homes from the previous year.

FIGURE 2.1 — RESIDENTIAL CONSTRUCTION COMPLETED TABLE (2019–2023)

	2019	2020	2021	2022	2023
Single-Family Detached Dwelling Units	736	918	1,311	1,399	1,933
Single-Family Attached Dwelling Units (Townhome/Duplex)	168	196	256	244	407
Multi-Family Dwelling Units	0	411	18	0	300
Total Dwelling Units	904	1525	1585	1643	2640

FIGURE 2.2 — RESIDENTIAL CONSTRUCTION COMPLETED CHART (2019–2023)

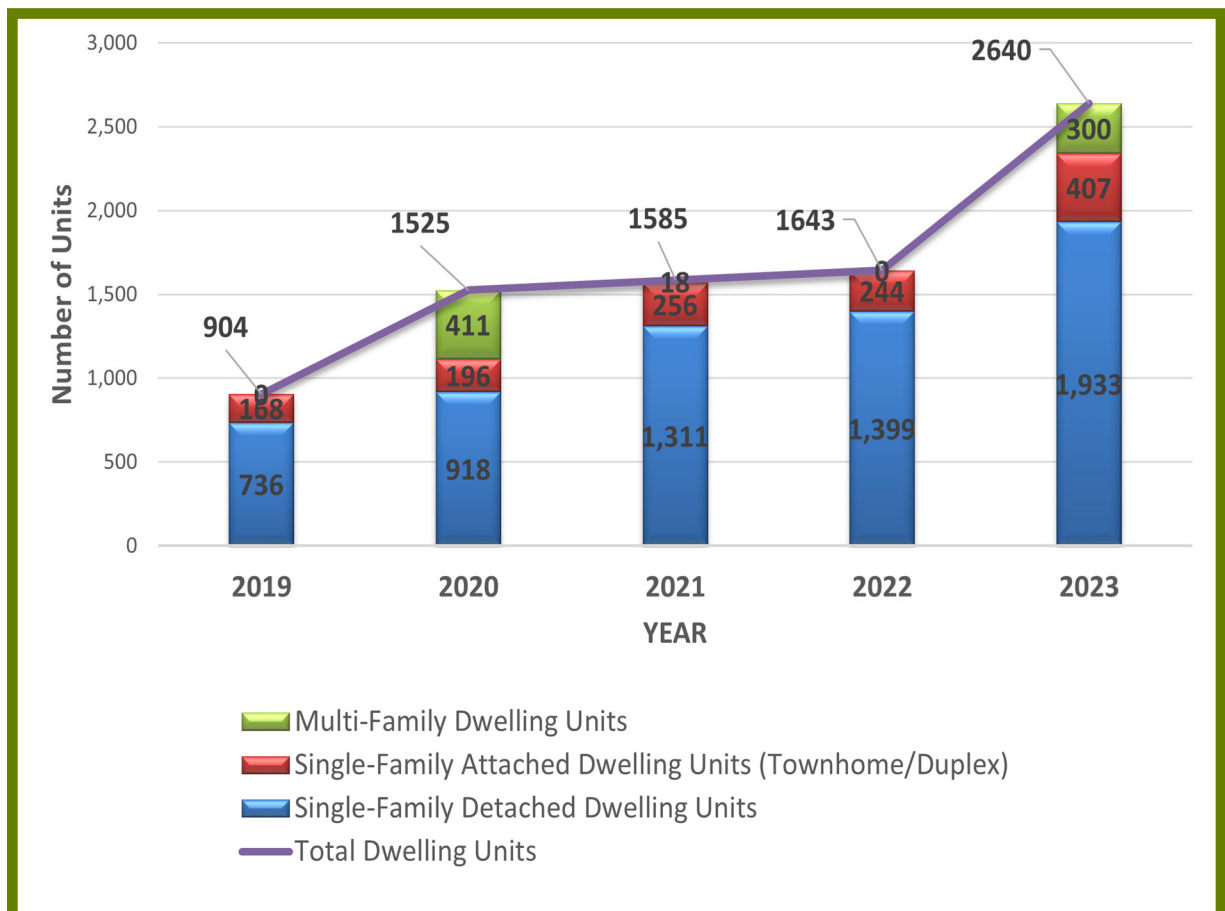
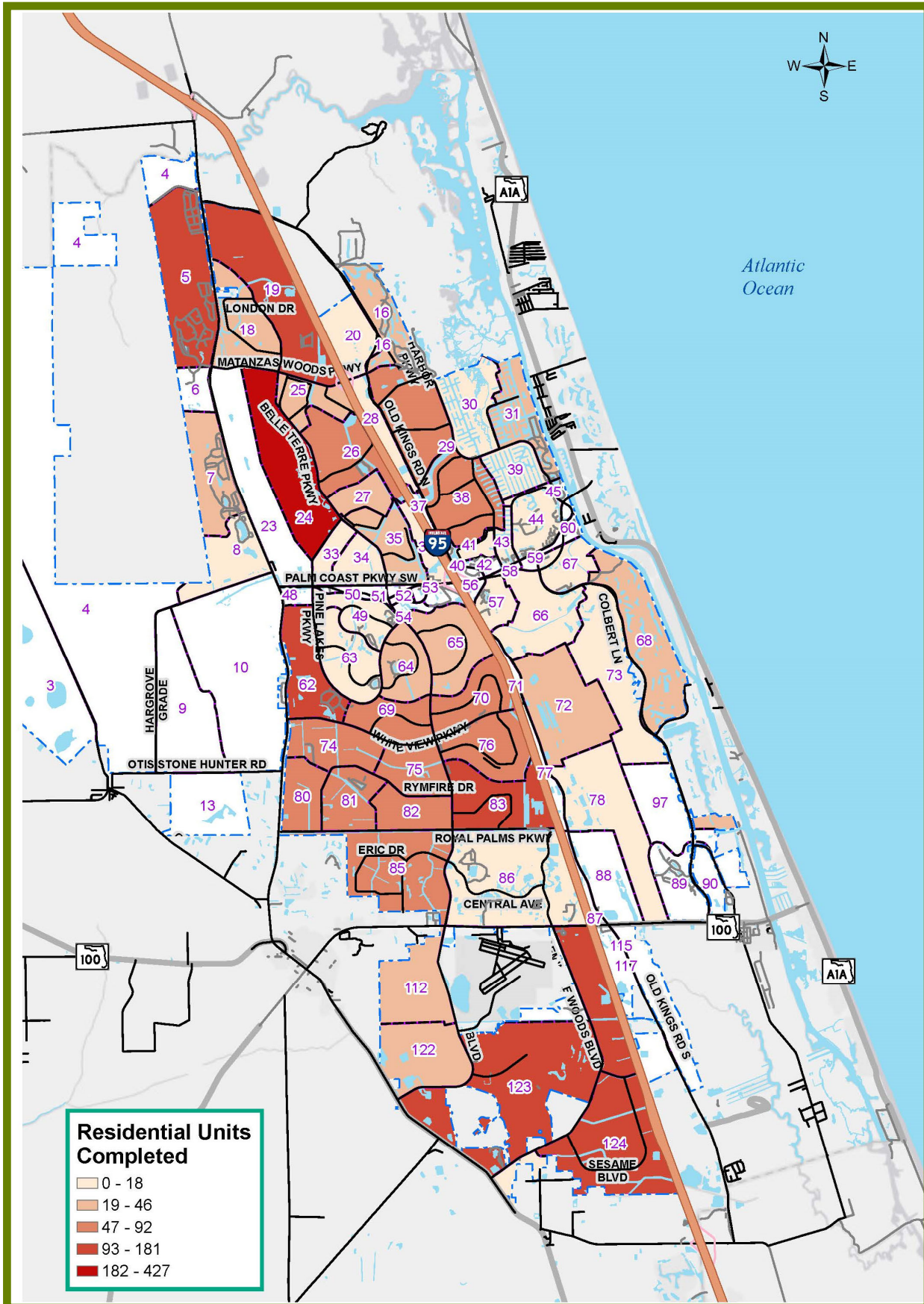


FIGURE 2.3 — RESIDENTIAL CONSTRUCTION COMPLETED MAP (2023)



BUILDING PERMITS ISSUED

The Building Division of the Community Development Department issues and tracks building permits for residential construction projects. Building permits indicate that a residential construction project is under construction and may be completed in the near future (0-3 years).

During the past year a total of 1339 single-family detached dwelling units and 266 single-family attached dwelling units were issued building permits. Additionally, 526 multi-family dwelling units received a permit. A majority of these multi-family units (364) were issued for projects within Town Center. Overall, the number of units issued a building permit decreased by approximately 10.5% from 2022.

FIGURE 2.4 – RESIDENTIAL BUILDING PERMITS ISSUED TABLE (2019–2023)

	2019	2020	2021	2022	2023
Single-Family Detached Dwelling Units	810	1,225	1,758	1,739	1,339
Single-Family Attached Dwelling Units (Townhomes/Duplex)	196	272	338	346	266
Multi-Family Dwelling Units	321	108	0	300	526
Total Dwelling Units (Permits)	1327	1605	2096	2385	2131

FIGURE 2.5 – RESIDENTIAL BUILDING PERMITS ISSUED CHART (2019–2023)

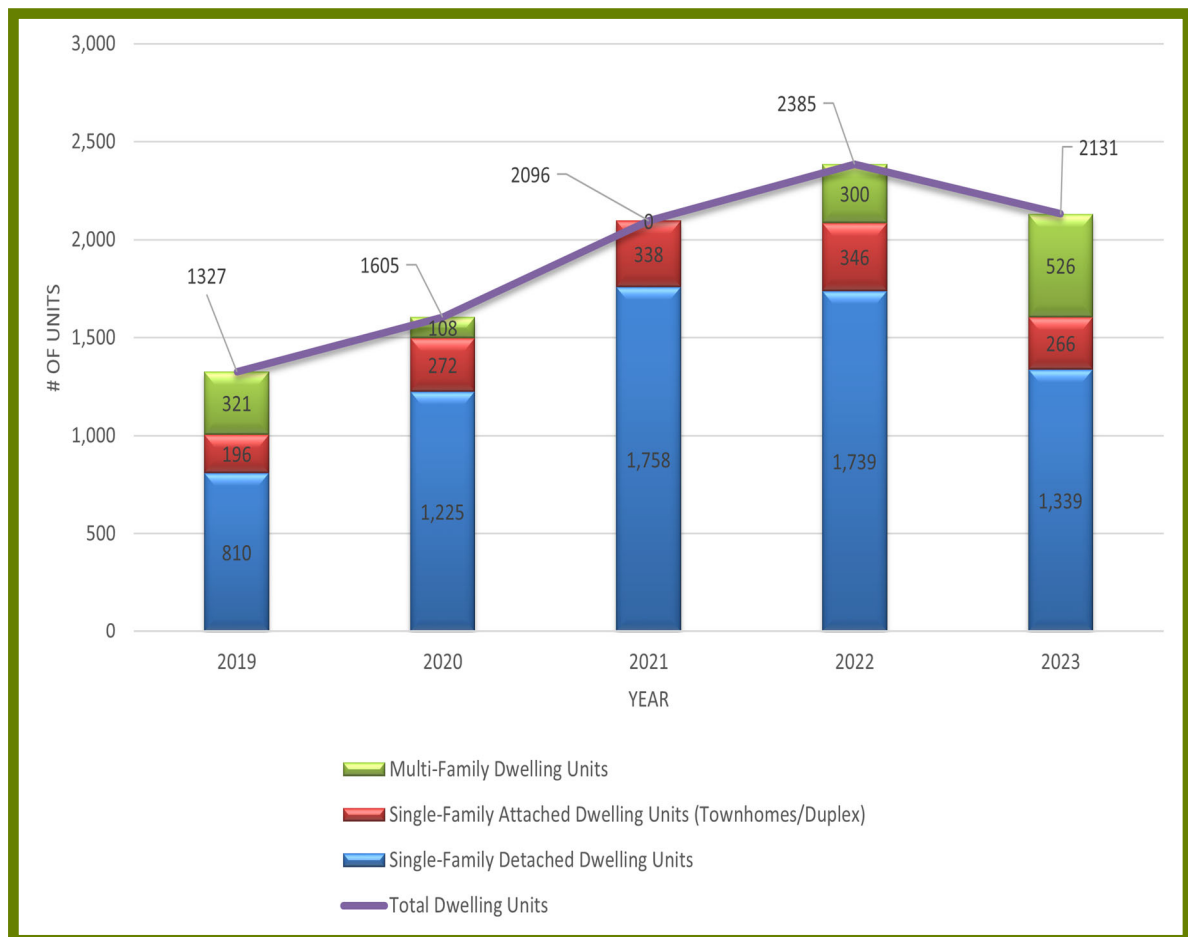
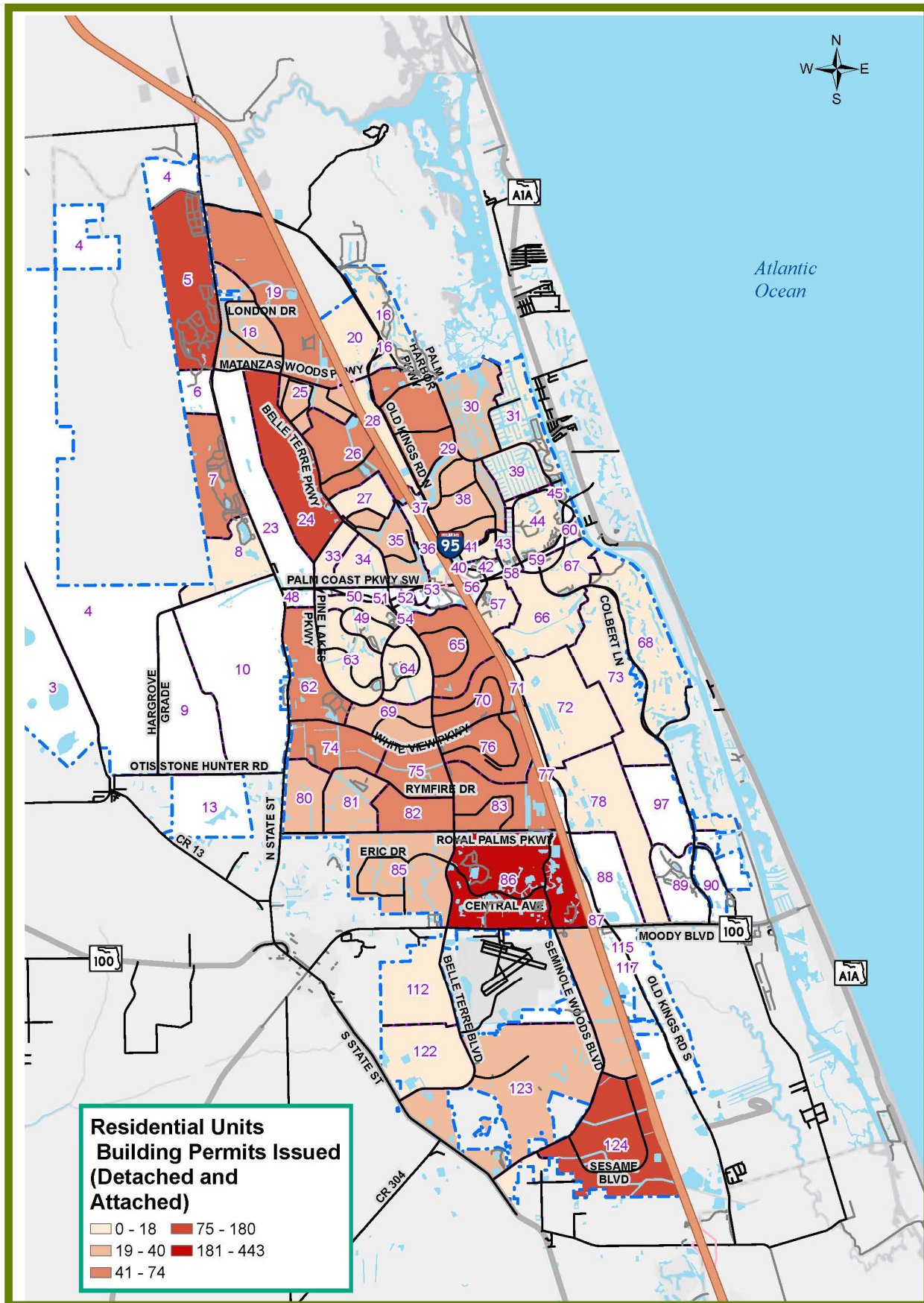


FIGURE 2.6 — RESIDENTIAL BUILDING PERMITS ISSUED MAP (2023)



DEVELOPMENT APPROVED

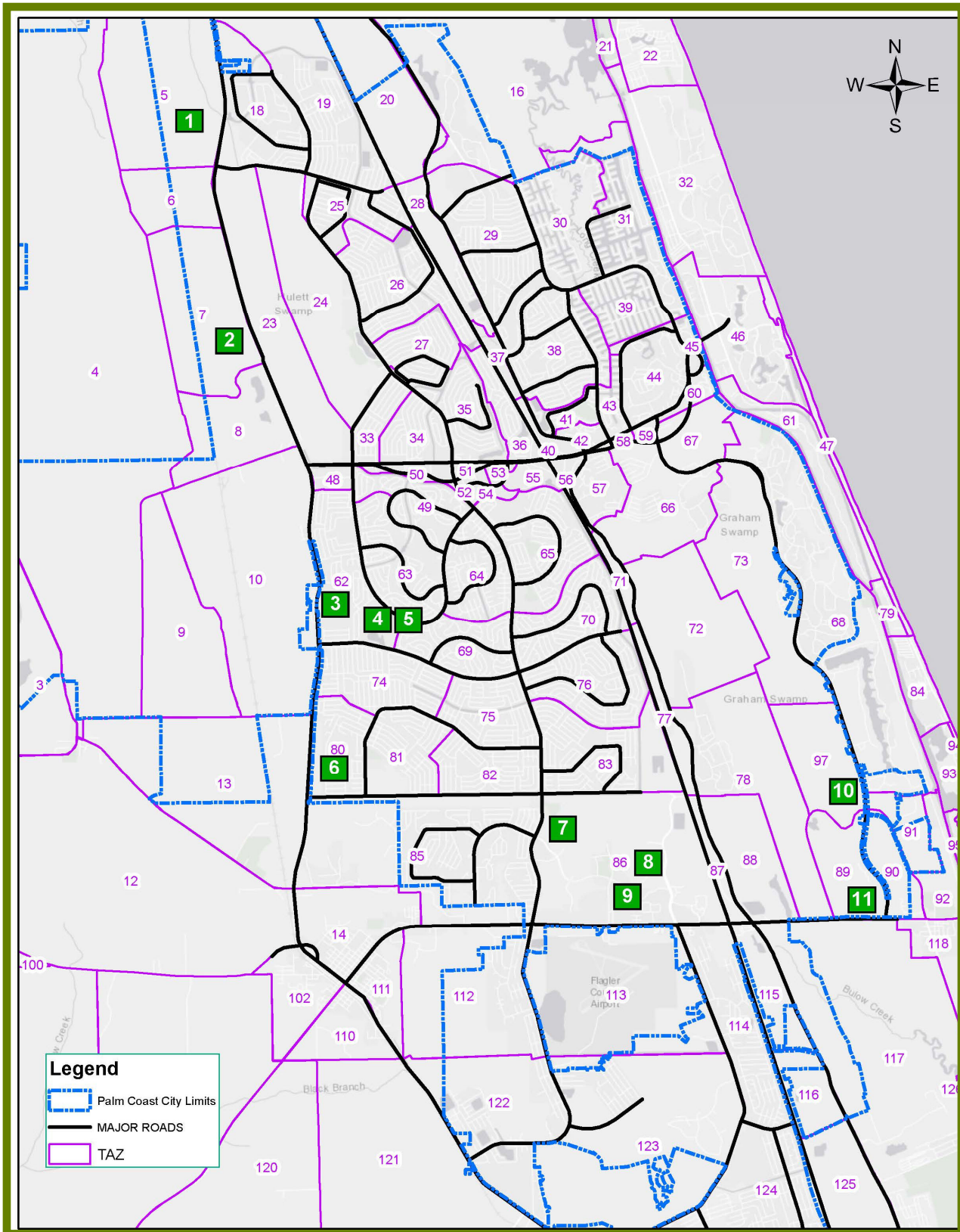
The Planning Division of the Community Development Department issues development orders for residential projects. Development orders allow an applicant to apply for a building permit to construct the residential project and may predict future growth in the short term (1–5 Years), depending on a variety of factors.

In 2023, the following Plat and Development Orders were approved for residential development. The total of 2771 dwelling units is an increase of approximately 110% from the previous year's (Year 2022) total.

FIGURE 2.7 — RESIDENTIAL PLAT AND DEVELOPMENT ORDERS APPROVED (2023)

Map ID #	Project Name	TAZ	# of Units	Description
1	Sawmill Branch Phase 2A	5	243	Single-Family
2	Reverie at Palm Coast Phase 1	7	272	Single-Family
3	Evolve	62	256	Multi-Family
4	Whiteview Village Phase 2	62	202	Single-Family
5	Whiteview Multi-family	62	316	Multi-family
6	Red Mill Apartments	80	214	Multi-family
7	Retreat at Town Center	86	66	Single-Family
8	Legacy At Palm Coast	86	300	Multi-family
9	Cameron At Palm Coast	86	246	Multi-family
10	Lighthouse Harbor	97	240	Multi-family
11	Ocean Village	89	416	Multi-family
	Summary of Residential Units Approved in 2023		2771	Dwelling Units

FIGURE 2.8 — RESIDENTIAL PLAT AND DEVELOPMENT ORDERS APPROVED MAP (2023)



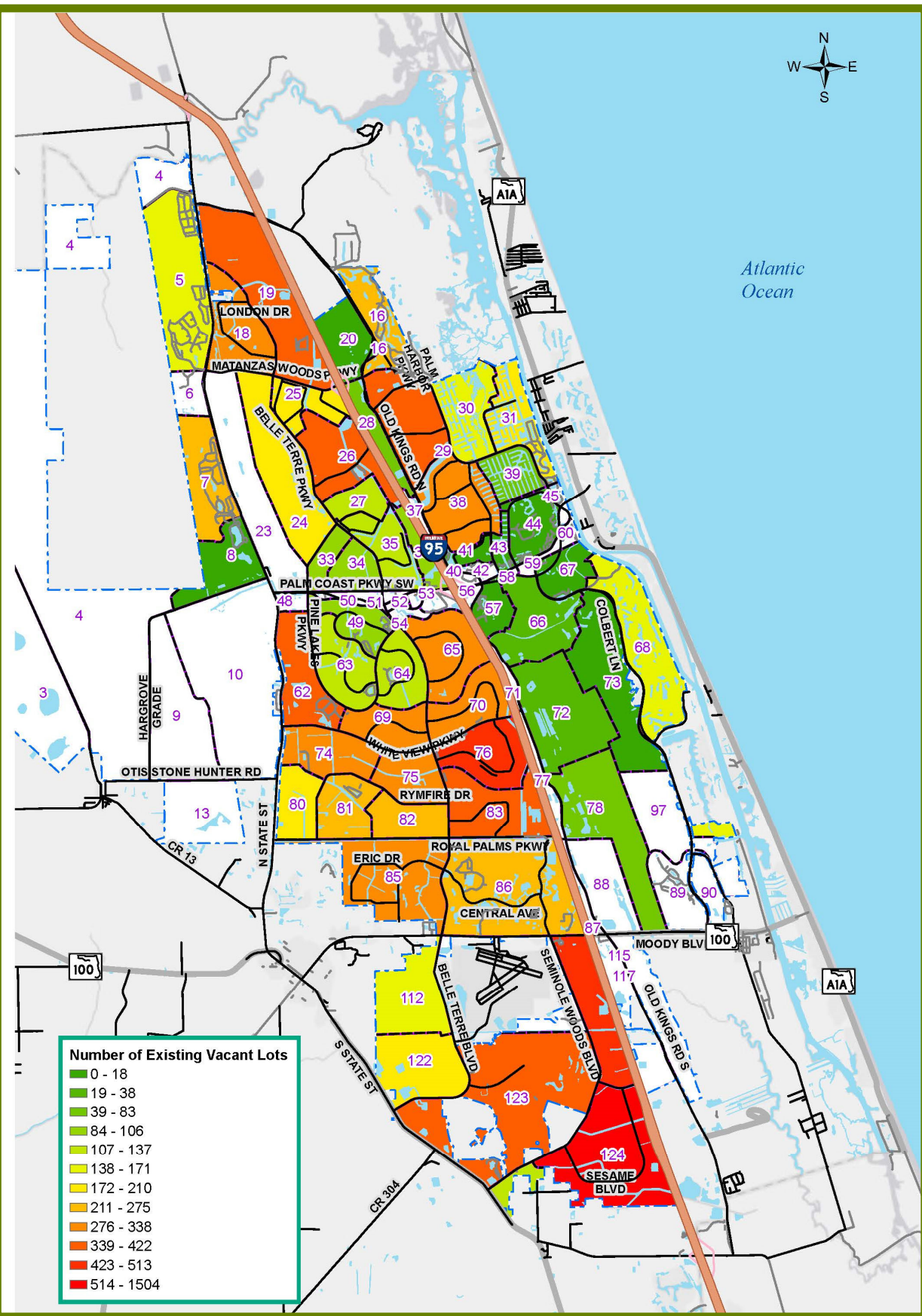
EXISTING VACANT LOTS

The City maintains a database of existing vacant lots for use by its various departments. At the end of 2023, the City contained approximately 11,616 vacant lots. The number of existing vacant lots represents future potential growth in the City over a period of approximately 10 to 15 years. It is important to note that the data for Total Lots on this table may change from year to year depending on the platting of additional residential lots. (e.g. a 100 acre tract counts as 1 lot, however, if this tract receives final plat approval for 250 lots, then the number of total lots will increase by that number of new lots).

FIGURE 2.9 — VACANT RESIDENTIAL LOTS BY TAZ

TAZ	Total Lots	Occupied Lots	Vacant Lots	Percentage Vacant
5	502	331	171	34.1%
7	272	26	246	90.4%
8	1	0	0	0.0%
16	354	125	229	64.7%
18	1040	746	294	28.3%
19	1513	1134	379	25.0%
20	22	4	18	81.8%
24	274	64	210	76.6%
25	859	669	190	22.1%
26	2029	1634	395	19.5%
27	774	659	115	14.9%
28	236	161	75	31.8%
29	1875	1453	422	22.5%
30	1033	866	167	16.2%
31	1449	1254	195	13.5%
33	601	495	106	17.6%
34	786	685	101	12.8%
35	1309	1172	137	10.5%
36	467	365	102	21.8%
38	2309	2013	296	12.8%
39	959	876	83	8.7%
41	362	357	5	1.4%
43	321	305	16	5.0%
44	967	960	7	0.7%
49	977	885	92	9.4%
57	424	420	4	0.9%
62	1496	1107	389	26.0%
63	1493	1362	131	8.8%
64	1177	1059	118	10.0%
65	1694	1379	315	18.6%
66	577	539	38	6.6%
67	33	31	2	6.1%
68	2474	2325	149	6.0%
69	1291	1002	289	22.4%
70	1543	1225	318	20.6%
72	78	46	32	41.0%
73	183	177	6	3.3%
74	1708	1380	328	19.2%
75	1445	1138	307	21.2%
76	2018	1519	499	24.7%
78	503	439	64	12.7%
80	888	692	196	22.1%
81	1117	886	231	20.7%
82	1242	967	275	22.1%
83	1752	1339	413	23.6%
85	2511	2173	338	13.5%
86	274	21	253	92.3%
112	730	563	167	22.9%
114	1301	788	513	39.4%
122	738	531	207	28.0%
123	1388	1023	365	26.3%
124	3156	1652	1504	47.7%
132	486	372	114	23.5%
TOTAL	55011	43394	11616	21.1%

FIGURE 2.10 — EXISTING VACANT RESIDENTIAL LOTS MAP (2023)



SECTION 3: NON-RESIDENTIAL DEVELOPMENT

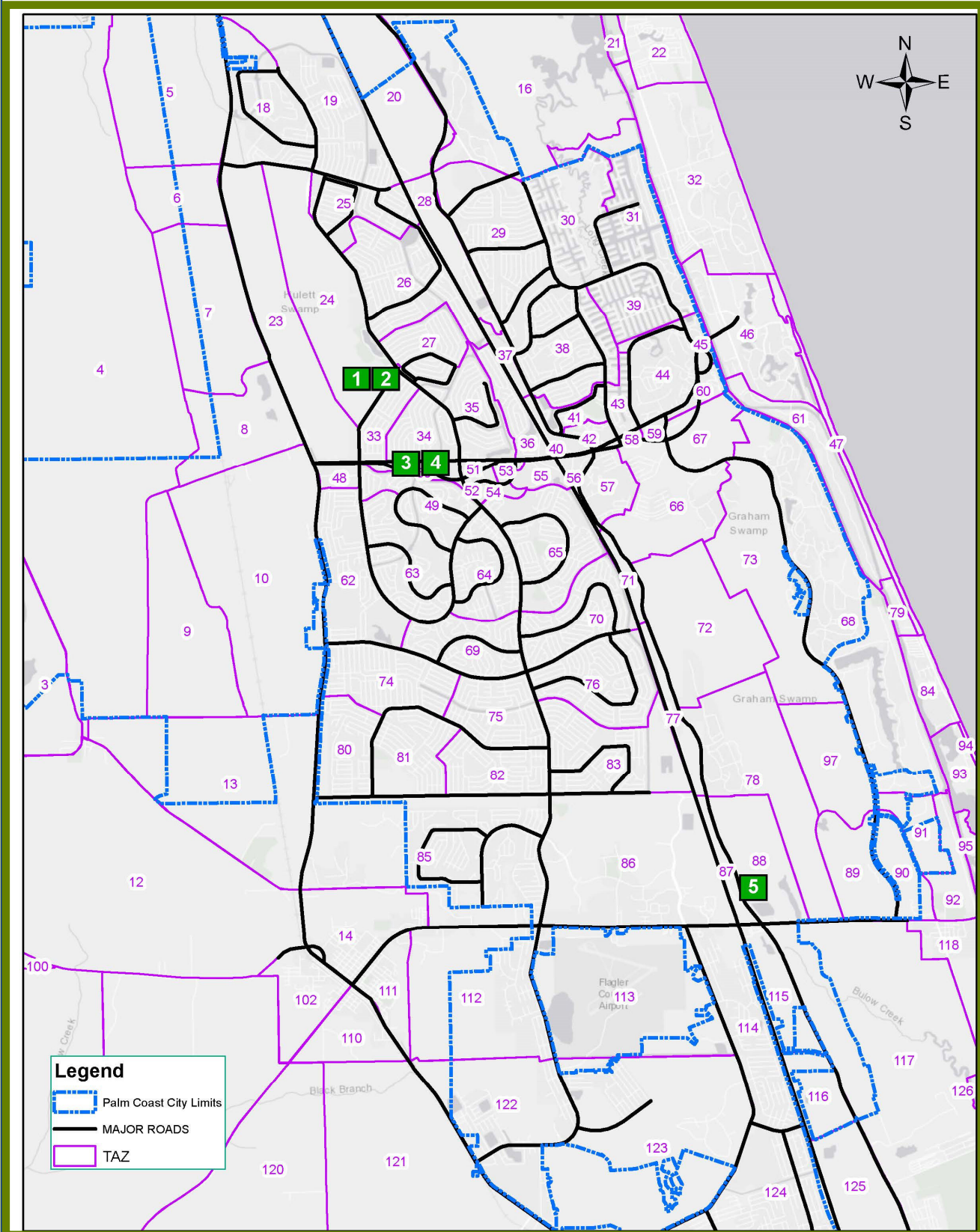
CONSTRUCTION COMPLETED

The Building Division of the Community Development Department issues and tracks Certificates of Occupancy, or “COs” for non-residential construction projects. COs indicate that a non-residential construction project has been completed and is ready for occupancy. During the past year, COs were issued for projects with a total of 188,856 sq. ft. of non-residential space. The total for 2023 is a decrease from the previous year’s total of 225,526 square feet. This year’s non-residential projects is driven mainly by the completion of AdventHealth Palm Coast Parkway Hospital along with an adjacent medical office building.

FIGURE 3.1 — NON-RESIDENTIAL CONSTRUCTION COMPLETED TABLE (2023)

Map ID #	Project Name	TAZ	Sq. Ft.	Description
1	Pointe Grand Apts. - Clubhouse	24	3,976	Residential Amenity
2	Pointe Grand Apts. - Fitness Bldg.	24	1,824	Residential Amenity
3	Advent Hospital - 100 beds	50	146,336	Hospital
4	Medical Office	50	30,000	Professional Office Bldg.
5	Tire Outlet	88	6,720	Retail
Summary of Non-Residential Building Construction Completed in 2023		188,856 Sq. Ft. of non-residential		

FIGURE 3.2 — NON-RESIDENTIAL CONSTRUCTION COMPLETED (2023)



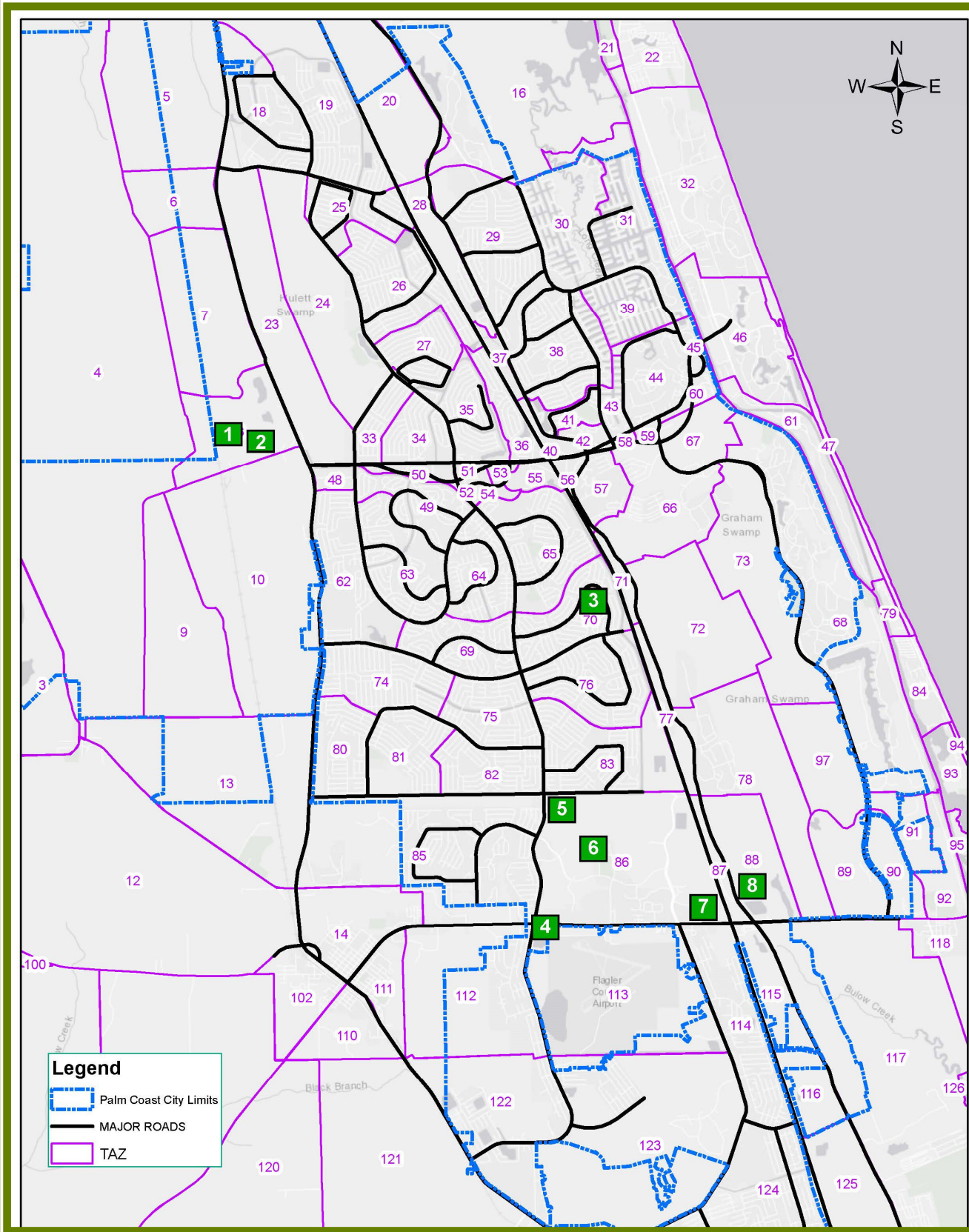
BUILDING PERMITS ISSUED

The Building Division of the Community Development Department issues and tracks building permits for non-residential construction projects. Building permits indicate that a non-residential construction project is under construction and may be completed in the near future (0-3 years). During the past year, building permits were issued for projects that included a total of 126,430 square feet of non-residential space, this amount is a decrease from last year's total of 302,265 sq.ft.

FIGURE 3.3 — NON-RESIDENTIAL BUILDING PERMITS ISSUED TABLE (2023)

Map ID #	Project Name	TAZ	Sq. Ft.	Description
1	Warehouse Shell & Core	10	11,000	Flex Space/Industrial
2	Building Shell	10	36,000	Warehouse/Office
3	American Village Pool Pavilion	70	873	Residential Amenity
4	Take 5 Car Wash	112	3,650	Car Wash
5	City of Palm Coast Southern Recreation Center	86	29,761	Recreational Center
6	The Haven Clubhouse	86	3,564	Residential Amenity
7	Advent Health Cancer Center	86	34,862	Professional Office
8	Tire Outlet	88	6,720	Retail
Summary of Non-Residential Building Permits Issued in 2023		126,430 Sq. ft. of non-residential		

FIGURE 3.4 — NON-RESIDENTIAL BUILDING PERMITS ISSUED MAP (2023)



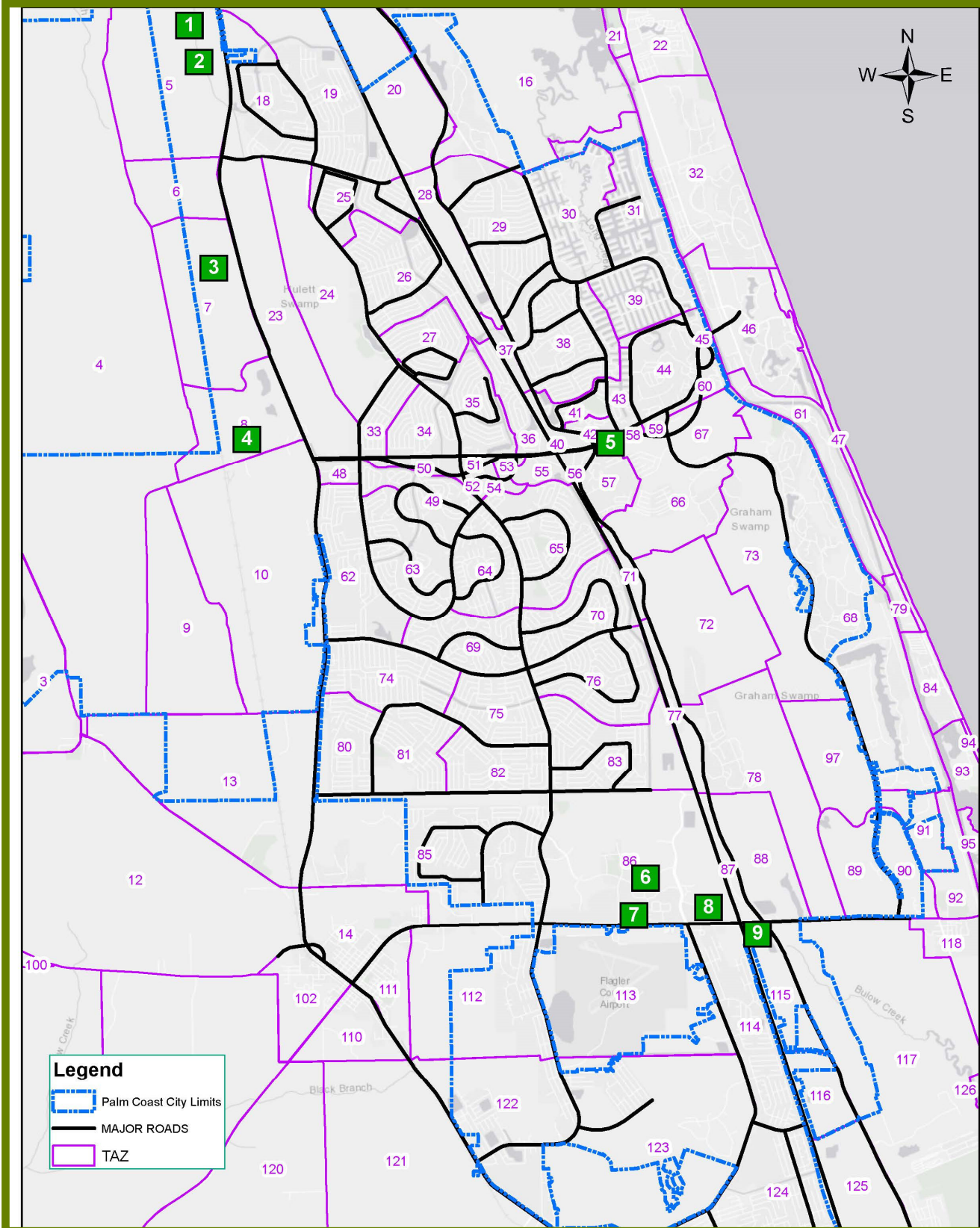
DEVELOPMENT APPROVED

The Planning Division of the Community Development Department issues development orders for non-residential projects. Development orders for non-residential projects allow an applicant to apply for a building permit to construct non-residential project and may predict future growth in the short term (1–5 years), depending on a variety of factors. In 2023, development orders totaled 526,573 sq.ft. of non-residential uses, this is an increase from 2022 total of 423,885 sq. ft.

FIGURE 3.5 — NON-RESIDENTIAL DEVELOPMENT APPROVED TABLE (2023)

Map ID #	Project Name	TAZ	Sq. Ft.	Description
1	Freedom at Sawmill Amenity Center	5	3,543	Residential Amenity
2	Sawmill Landings Amenity Center	5	8,149	Residential Amenity
3	Somerset Amenity Center	7	3,679	Residential Amenity
4	Hargrove Mini Storage	8	150,898	Boat & RV Storage
5	Wawa	58	5,636	Convenience Store/Fuel Pumps
6	Town Center Phase 2, Lots 1-3	86	35,000	Retail & Office Bldg.
7	Secure Space Storage	77	283,968	Mini Storage, Boat & RV Storage
8	Advent Health Cancer Center	86	35,000	Professional Office Bldg.
9	Eliano's Coffee Shop	115	700	Food Service
Summary of Non-Residential Development Approved in 2023		526,573 Sq. Ft. of Non Residential		

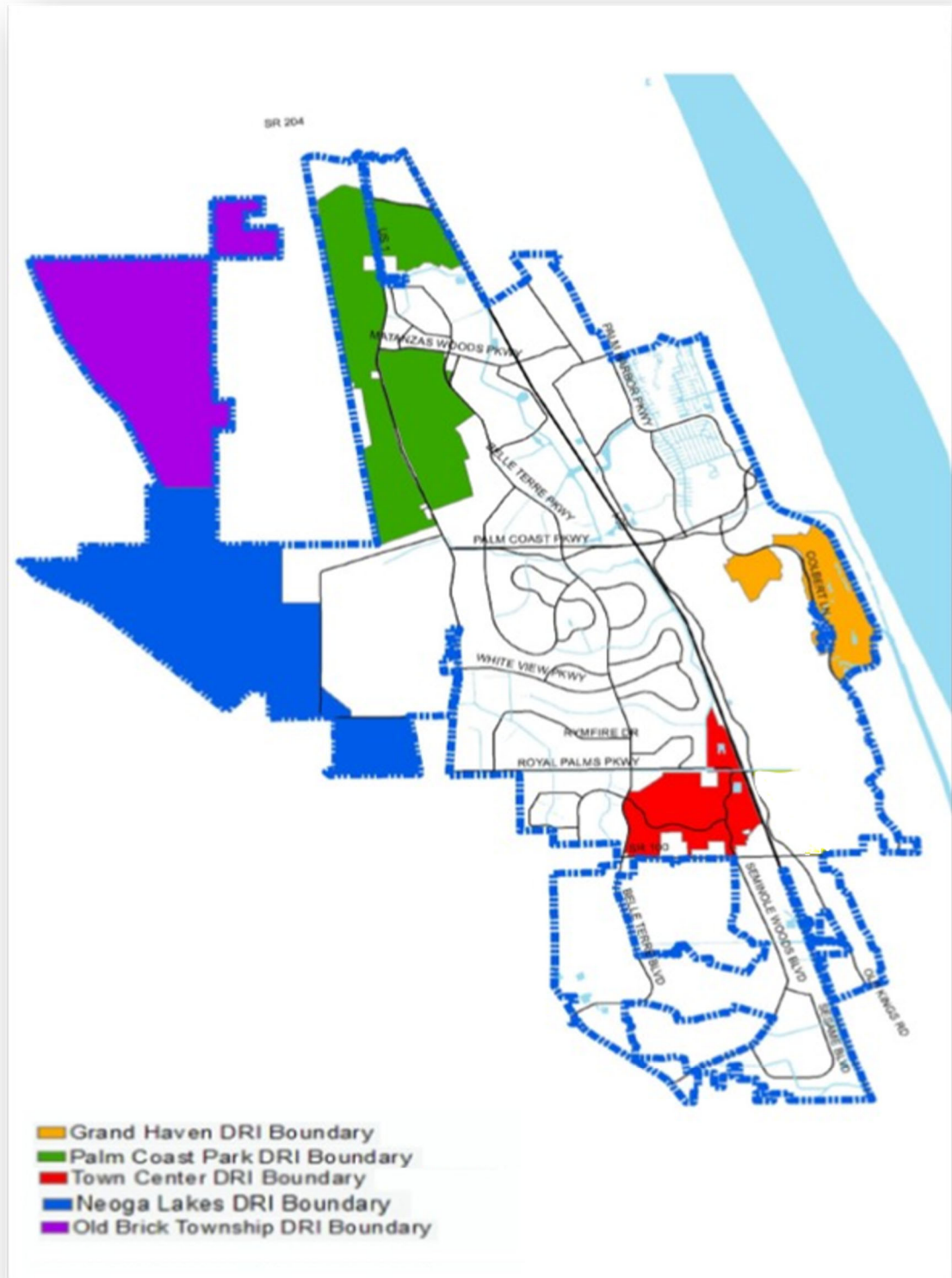
FIGURE 3.6 — NON-RESIDENTIAL DEVELOPMENT APPROVED MAP (2023)



SECTION 4: STATUS OF MAJOR DEVELOPMENTS

Six (6) major developments, or Developments of Regional Impact (DRI), are approved within the City and will contribute to the overall growth of the City over the long term (up to 25 years). The Grand Haven DRI is substantially complete, with the exception of the remaining non-residential component. The other five (5) major approved developments could contribute 20,511 dwelling units and 10,626,000 square feet of non-residential space over the next 25 years. A location map of these major developments is shown below and the pages following provide a detailed status of the approved major developments.

FIGURE 4.1 — MAJOR DEVELOPMENT LOCATION MAP



PALM COAST PARK DRI

The Palm Coast Park DRI was approved on December 7, 2004. In 2023, the Development Order was amended to increase the maximum number of dwelling units to 6,454. The development order has a buildout date through Dec. 31, 2034.

FIGURE 4.2 — PALM COAST PARK DRI MAP AND TABLE

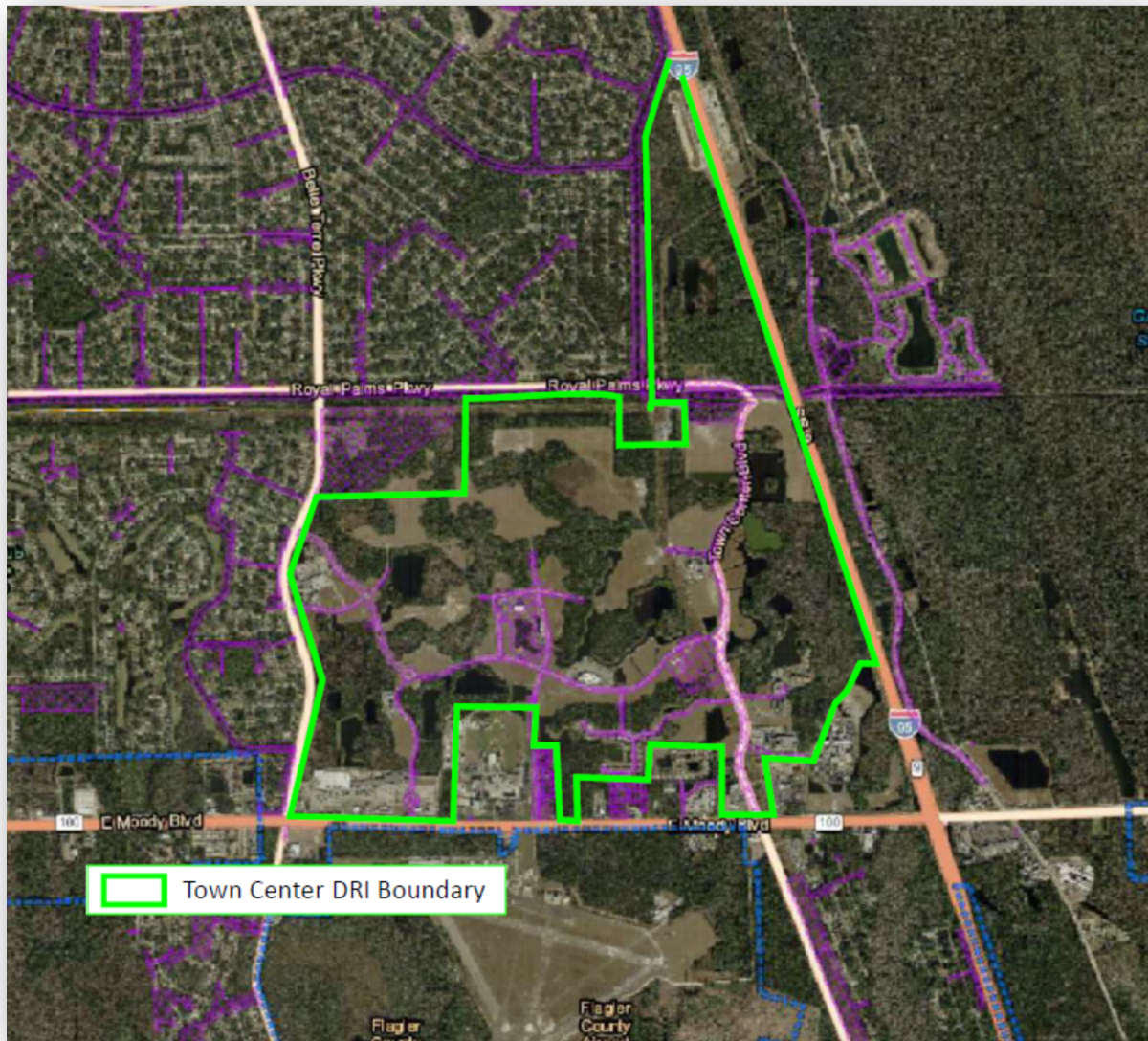


	Entitlement	Approved Development (Plats or DOs)	Construction Completed (COs)
Residential	6,454 du	2,839	464
Office	538,112 sf	-	-
Retail Commercial	1,089,800 sf	6,106	6,106
Industrial	1,100,000 sf	-	-
Institutional	100,000 sf	-	-

TOWN CENTER DRI

The Town Center DRI was approved on July 11, 2003 and the development plan includes 3,575 dwelling units, over 5 million square feet of non-residential space, over 3 phases through 2035. A summary of development approvals is provided in the table below.

FIGURE 4.2 — TOWN CENTER DRI MAP AND TABLE

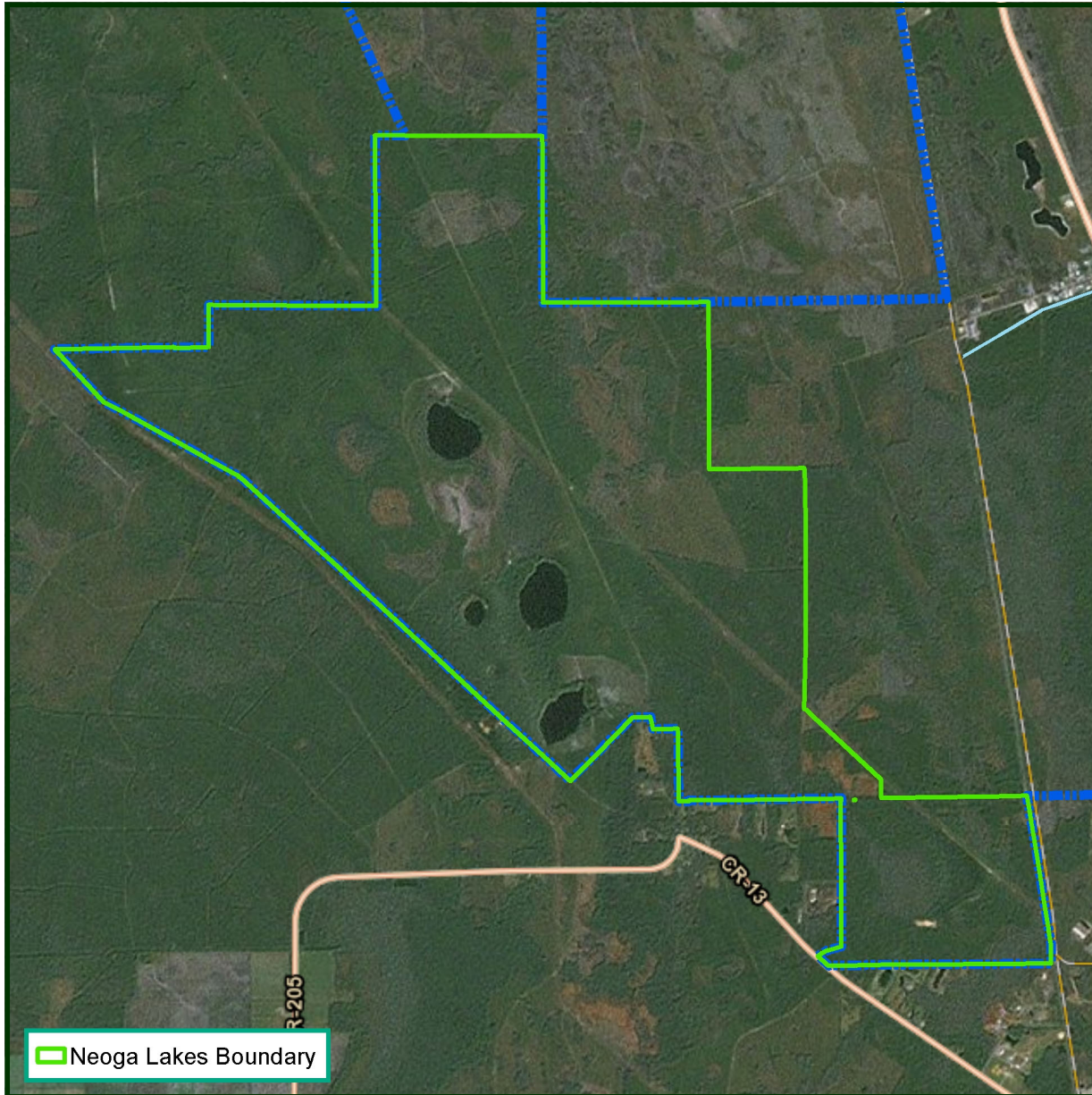


	Entitlement	Approved Development (Plats or DOs)	Construction Completed (COs)
Residential	3,575 du	953	554
Retail/Comm/Office	5,014,657	814,260	814,260
Movie Theater	2,400 Seats	2,400	2,400
Lodging	480 rooms	125	125
Nursing Home	240 beds	202	202

NEOGA LAKES DRI

The Neoga Lakes DRI became effective after the settlement of the Department of Community Affairs' appeal on July 27, 2011. The development plan includes 7,000 dwelling units, 2,491,000 square feet of non-residential space (including sites for a school and a wastewater treatment plant), recreation areas, open space and conservation areas. The project has three phases through November 2030.

FIGURE 4.4 — NEOGA LAKES DRI MAP AND TABLE

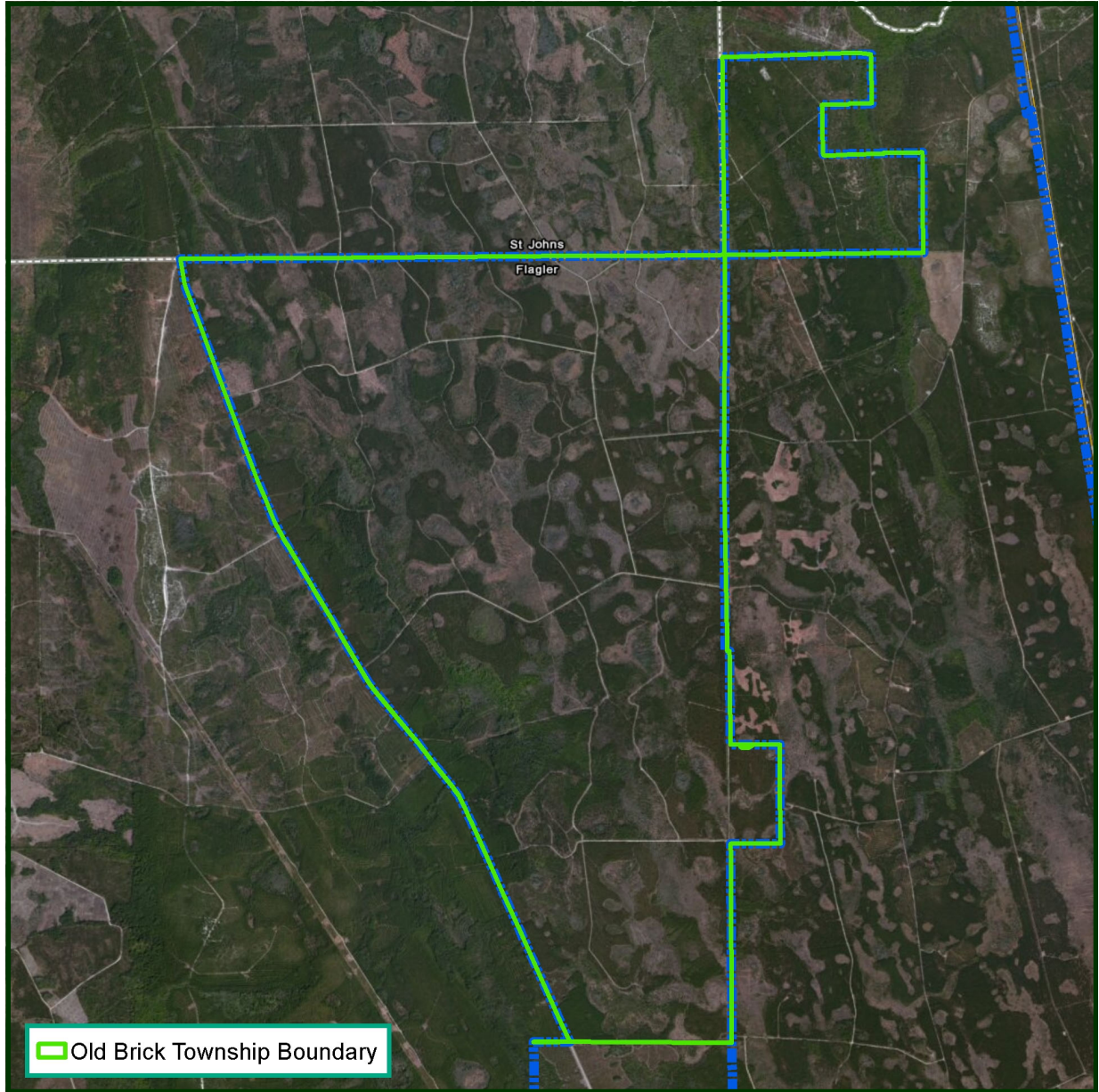


	ENTITLEMENT	Approved Development (Plats or DOs)	Construction Completed (COs)
RESIDENTIAL	7,000 du	-	-
RETAIL USES	354,000 sf	-	-
OFFICE USES	45,000 sf	-	-
CIVIC USES	222,000 sf	-	-
EMPLOYMENT CENTER	1,870,000 sf	-	-

OLD BRICK TOWNSHIP DRI

The Old Brick Township DRI became effective after the settlement of the Department of Community Affairs' appeal on July 27, 2011. The development plan includes 5,000 dwelling units, 1,150,000 square feet of non-residential space, a school site, recreational amenities, and conservation areas. The project has three phases through August 2031.

FIGURE 4.5 — OLD BRICK TOWNSHIP DRI MAP AND TABLE



	ENTITLEMENT	Approved Development (Plats or DOs)	Construction Completed (COs)
RESIDENTIAL	5,000 du	-	
COMMERCIAL	100,000 sf	-	-
OFFICE	50,000 sf	-	-
INDUSTRIAL	1,000,000 sf	-	-

SECTION 5: ADDITIONAL INFORMATION FOR THE SCHOOL DISTRICT

The *Interlocal Agreement for Public School Facility Planning* requires that the City provide information to the School District annually regarding Future Land Use Map amendments, conversion of residential units, and development approvals with school sites, in addition to the information regarding residential growth already contained in this report.

FUTURE LAND USE MAP OR ZONING MAP AMENDMENTS

The City processed the following Future Land Use Map Amendments or Zoning Map Amendments that would impact school capacity.

- A Zoning Map Amendment for 26.31 acres from MFR-1 to SFR-1. This reduced the potential number of units on the property from 210 multi-family units to 108 single-family units.

- A Future Land Use Map Amendment and Zoning Map Amendment for 41.57 acres. This amendment increased the potential number of units on the property from 41 single-family units to 177 single-family units.

- A Future Land Use Map Amendment along with a companion Zoning Map Amendment for 505+/- acres. This amendment is for an approved DRI which permitted a maximum of 2,411 dwelling units (single-family and multi-family) to a proposed maximum of 750 single-family units.

- An amendment to the Marina Village Master Planned Development Agreement which increased the maximum number of dwelling units from 663 to 1,085.

- A Zoning Map Amendment for 40 acres from General Commercial (COM-2) to Master Planned Development (Belle Terre Estates). The MPD agreement permits a maximum of 275 lots/units.

- An Amendment to the Palm Coast Park DRI-DO and PUD-DA to increase the maximum number of residential units by 750. This brought the maximum residential entitlements of the project to 6,454.

CONVERSION OF RESIDENTIAL UNITS

The City did not review any conversions or redevelopment of residential units in 2023.

DEVELOPMENT APPROVALS WITH SCHOOL SITES

PALM COAST PARK DRI SCHOOL SITE

No action that impacts demand on school capacity.

JX STATE ROAD 100 DRI SCHOOL SITE

The City approved a Future Land Use Map Amendment and Zoning Map Amendment that reduced the permitted number of units. The amendment will reduce the impact below the DRI level. City Council subsequently approved a Resolution to abandon the JX State Road 100 DRI.

OLD BRICK TOWNSHIP DRI SCHOOL SITE

No action that impacts demand on school capacity.

NEOGA LAKES DRI SCHOOL SITE

No action that impacts demand on school capacity.





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