

## Opportunity for North St. Louis County to align with the Greater St. Louis 2030 Jobs Plan

Released in 2021, the 'STL 2030 Jobs Plan' provides a 10-year roadmap for boosting economic growth, increasing the number of quality, living-wage jobs, and reducing racial disparities in employment and wealth-generation to boost opportunities for all. The plan is the first metro-wide jobs plan in a decade for St. Louis' 15-county region.

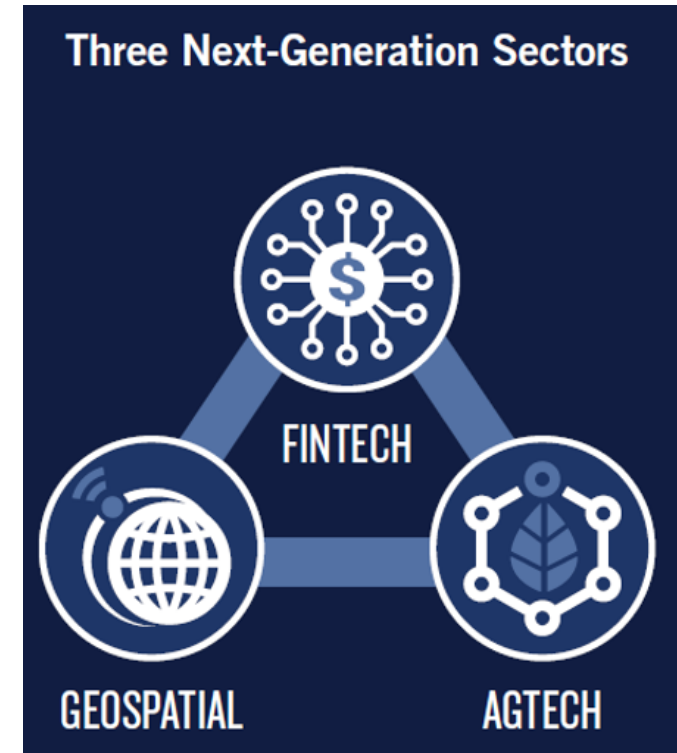
The Ag-Food Technology Campus can align with the 'STL 2020 Jobs Plan' in two key ways:

- AgTech is a Next-Generation Sector
- Advancing Racial Equity

### AgTech is a Next-Generation Sector

AgTech is identified in the Jobs Plan as a Next-Generation Sector, along with FinTech (Financial) and Geospatial, to make St. Louis Metro a hub for next-generation industries and technologies.

Positioning the Jamestown Mall site to be part of the St. Louis region's AgTech ecosystem goes beyond just individual jobs on the site. Along with other upcoming North St. Louis County investments like the Saint Louis Zoo WildCare Park, the Jamestown Ag-Food Technology Campus will elevate the perception and brand of North County.

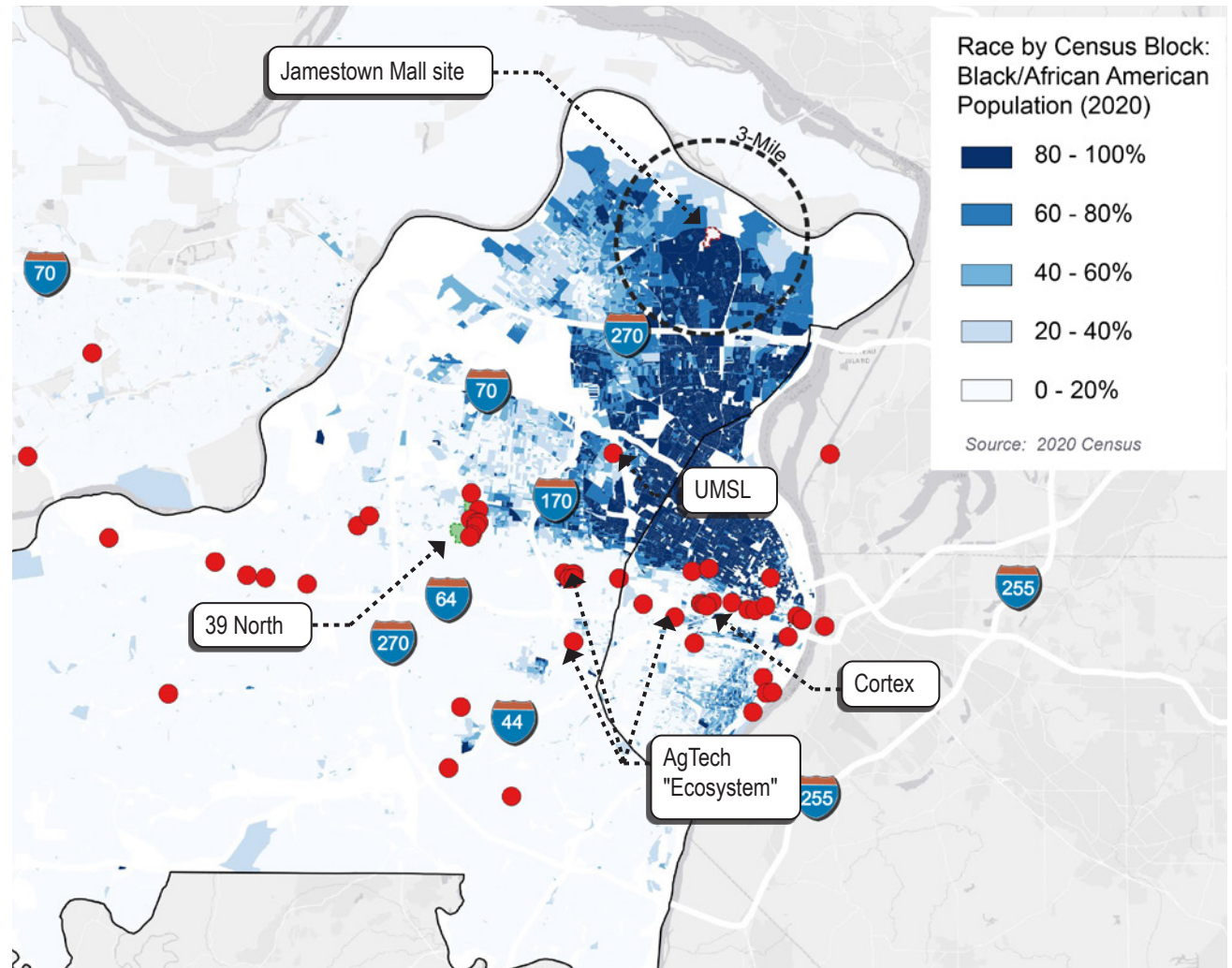


## Advancing Racial Equity

Advancing racial equity and social justice is a key element of the Jobs Plan. While the Jobs Plan focuses on the City of St. Louis, the Ag-Food Technology Campus will help extend the goals of the Jobs Plan to an area of the St. Louis region that has seen increased diversity over the last two decades.

The map on this page highlights the existing AgTech "ecosystem" (businesses and organizations in AgTech/Ag-Food) overlaid on a race map of St. Louis County. As the map shows, much of the AgTech "ecosystem" is currently along the Interstate 64 corridor.

An Ag-Food Technology Campus at the Jamestown Mall site will extend equitable investment in a highly diverse area of St. Louis County.





## PREFERRED LAND USE AG-FOOD TECHNOLOGY CAMPUS



### WHAT'S INVOLVED

- Emphasis on expansion space for agriculture technologies and production facilities for growing firms from St. Louis regional AgTech centers.
- In addition to agriculture focus, remain open to research and technology opportunities outside of agriculture that can expand regional opportunities.
- Opportunity for high productivity agriculture facilities utilizing advanced technology in food growth relatively close to population centers.
- Renewable energy (solar) to provide electricity (or partially offset).

### BENEFITS

- AgTech is a major St. Louis regional economic sector.
- Strong indications of a regional need for additional space for the AgTech sector.
- New science emerging from established companies.
- Spaces/facilities need varies, but could include:
  - Greenhouses
  - Test plots
  - Precision Fermentation
  - Lower-cost facility spaces
- Central location in U.S. agricultural belt.
- While onsite jobs may be limited, the site could play an important role in the regional economy.
  - Close to skilled labor force
  - Close to research centers
  - Close to international airport
  - Less expensive land
- Agriculture land north of Lindbergh Blvd could support and benefit from this scenario.
  - Land is out of flood plain
  - Otherwise limited development potential

### KEY STATS

- Hi-Tech Large Scale Green House
- Precision Fermentation Facility
- Greenhouses
- Lower-cost Facilities
- Field Test Plots
- Solar Energy
- Annex Front Door with Office/ Job Training, Neighborhood grocery/retail, Community open space





# PREFERRED LAND USE AG-FOOD TECHNOLOGY CAMPUS



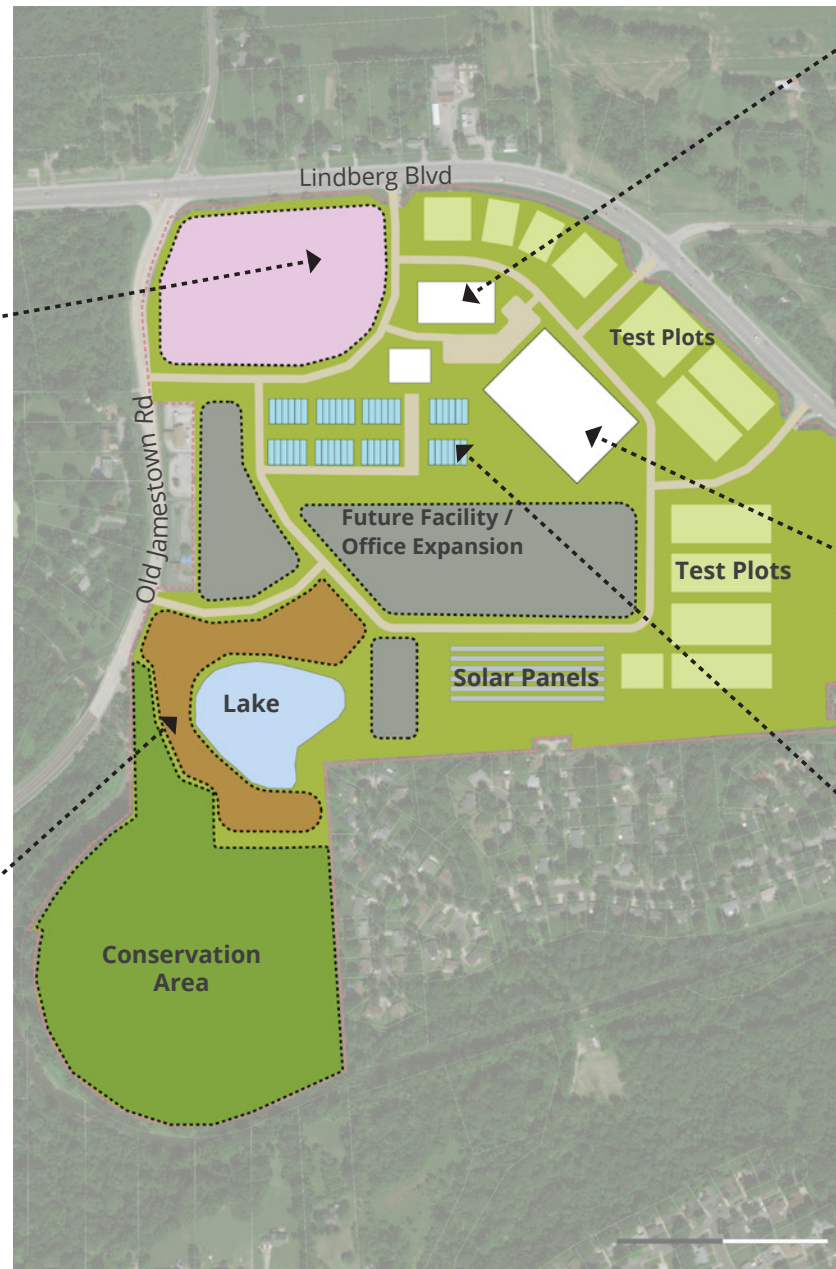
## CONCEPT DIAGRAM

The concept diagram is not a "master plan". It is meant to convey the scale of land uses and potential development principles of the scenario. This is just one example of the potential location of uses on the site.

### Annex "Front Door"



### Conference / Special Events Center



### Precision Fermentation Facility



### Test Plots



### Hi-Tech Large Scale Greenhouse



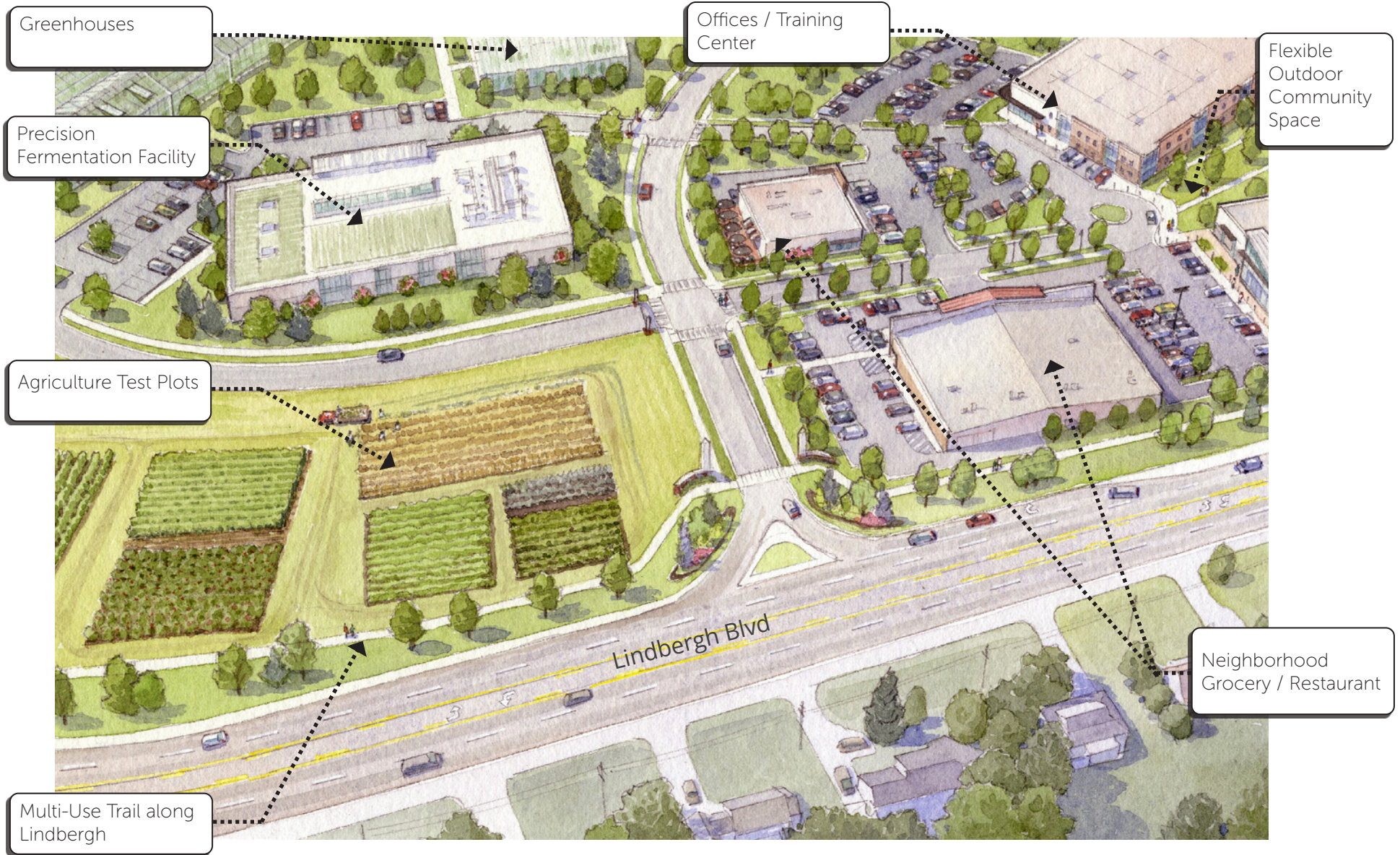
### Greenhouses / Growing Hoops







## PREFERRED LAND USE AG-FOOD TECHNOLOGY CAMPUS



*Note: The above sketch is only a "concept" meant to convey an example of development to help visualize the land uses and potential development principles as part of the scenario.*

## Branding

"Ag-Food Technology Campus" is just a working title for now. Much the same way that "Agriculture and Energy Technologies Annex" or "AgTech Annex" was a working title during the evaluation of the land use scenarios.

However, branding of the Ag-Food Technology Campus will be necessary as the site development moves forward. Alignment with the regional AgTech/Ag-Food ecosystem will elevate the site and north St. Louis County. Therefore, branding is an essential component.



*Above are just working  
examples of potential branding*



## Ag-Food Technology Campus: Implementation

After this Market Analysis and Feasibility Study, the St. Louis County Port Authority intended to issue a request for proposals (RFP) for the site based on the recommendations of this report. The Ag-Food Technology Campus, however, does not lend itself to a traditional developer RFP process. Instead, examples of innovation/technology hubs tend to be a mix of public and private partnerships with a combination of for-sale and for-lease real estate.

The success of this Market Analysis and Feasibility Study has positioned the site to be part of an essential regional economic sector. For the first time in over a decade, there is strong community support for the direction and future of the Jamestown Mall site. The Ag-Food Technology Campus is a forward-thinking economic development opportunity for north St. Louis County that would further elevate the area along with other recent investments, such as the Saint Louis Zoo's WildCare Park.

AgTech is a "Next-Generation" economic sector for the St. Louis region. In many ways, this is a positive for the Jamestown Mall site. There is an opportunity to be part of the growing momentum and demand for AgTech/Ag-Food investments in the St. Louis region. However, the downside of being a "Next-Generation" sector is that the market demand is not fully realized, at least as part of a linear site development process. There are also limitations to traditional market data to support "Next-Generation" sectors. (Case in point are the recent specialized studies examining the demand for innovation "step-up" space and the demand for a regional specialized fermentation facility.) Much of the market demand is presently based on limited, but illuminating, data and much anecdotal information gleaned from area professionals and economic development advocates.

*"For the first time in over a decade, there is strong community support for the direction and future of the Jamestown Mall site."*

While the St. Louis County Port Authority could immediately issue an RFP based on the preferred land use scenario (Ag-Food Technology Campus), there are sufficient uncertainties with the AgTech/Ag-Food scenario that it is unlikely that a current RFP will result in an acceptable proposal for the entire site.

Thus, this report recommends the following procedure to initiate the implementation of the Ag-Food Technology Campus scenario.

### **Complete the Demolition**

Complete the demolition of the existing mall and prepare the entire site as an obvious development opportunity. A greenfield site will show progress to the community and greatly increase the marketability of the site moving forward.

### **Initiate an "Exploration Window"**

Initiate a 24-to-30 month "exploration window" to more fully determine reasonable parameters and financial expectations of the scenario:

- Sponsor or co-lead a "Regional AgTech working group" consisting of economic development organizations serving all or parts of the metropolitan area, workforce and educational organizations training people in ag/tech skills and management, and selected businesses and entrepreneurs in the industry. (The November meeting of such organizations at the St. Louis Economic Development Partnership was a start.) Given the potential national and international impact of this scenario, Greater St. Louis, Inc. and/or the Missouri Partnership could be co-leaders of the working group.
- Create a data-driven and consensus-driven master plan for the site, once again including community input. Residents of north St. Louis County have broadly agreed that this is the preferred scenario, but they did so without a more specific master plan. Only about 100-110 acres of the site's 142 acres are realistically available for new development in light of the conservation area defined by Cold Water Creek. Still, the AgTech/Ag-Food scenario may not require all 100-110 acres, so other compatible uses should be considered (e.g., senior housing, village-scale retail center).

- Include prospective real estate developers as independent experts to inform the planning process. This will ensure that market potential and financial considerations are realistic. Do not include developers, however, on oversight or planning committees. Keep them at arms-length to preserve their objectivity for eventual RFP responses.

### **Additional Site Testing**

Conduct testing for radioactive contamination. Areas of development on the Jamestown Mall site are well away from Coldwater Creek's floodplain. However, recent conflicting findings at Jana Elementary School of radioactive contamination have created uncertainty about any property adjacent to or near Coldwater Creek. Researchers with the firm Boston Chemical Data Corporation found "entirely unacceptable" contamination levels at Jana Elementary school in samples collected in August 2022. However, the U.S. Army Corps of Engineers St. Louis District issued a preliminary finding in November 2022 that showed no presence of radioactive material above the expected range of background levels (the level of radioactivity Mother Nature already provides) at Jana Elementary school. The Jamestown Mall site should be tested to ease any uncertainty or perceptions of the site.

### **Issue a Developer Request for Proposals (RFP)**

Issue a developer Request for Proposals (RFP) based on the master plan. With sufficient input from experienced developers during the planning process, the RFP should be explicit enough to encourage competitive responses.

### **Retain Site Control**

Retain Port Authority control of the site through the exploration window period.

- Assure residents in north St. Louis County that there is and will be consistent oversight of the property by an entity with strong links to St. Louis County government and the range of economic and workforce development entities that should and will be involved.
- Assure that the actions and planning during the exploration window remain consistent with the economic development goals of the Partnership and citizens of North County and with the findings of the current study.



## Ensure Socio-Economic Benefits

Analyze a variety of techniques to provide public-sector support to assure developer success that also contributes to the socio-economic benefits of the region, the county, and especially North County. Techniques might include, though not necessarily be limited to:

- Provide the site free of charge to the winning development team to reduce its upfront costs. (This will necessarily eliminate direct cost-recovery for the Port Authority based on expenditures related to the site.)
- Evaluate financial incentives that could be applied to the development of the site and/or to occupant businesses on the site that improve private sector rates of return. Such incentives could include, but not be limited to:
  - ◊ Property tax abatement
  - ◊ Tax increment financing
  - ◊ Sales tax reductions for construction materials
  - ◊ Income tax credits
  - ◊ Workforce training programs or credits
  - ◊ Retention of employee state withholding taxes

## Continue to Generate Local Interest in the Scenario and the Site

- Support schools to teach ag-tech and food growing programs.
- Support collegiate research that reinforces the advanced technology in growing food.
- Sponsor community gardens and related programs that demonstrate the importance and skills in agricultural research as well as techniques for preparing food for human consumption.

## Promotion and Marketing

Take the current study “on the road” to widely promote that transformation of Jamestown Mall is actively underway, but that input is still being sought for a promising economic development scenario. Sustain top-of-mind interest in the site.

- Maintain an active website, updating with newsworthy accomplishments, meetings, and presentations.
- Make presentations to and participate in meetings with a wide range of professional, community, workforce, educational, and political organizations (among others), including formal presentations to the St. Louis County Council and, possibly, to relevant committees of the Missouri General Assembly. Keep everyone fully, but gently, informed. Continue to reinforce the groundwork for possible future legislative, financial, and community support.
- Create an email list of interested parties for routine (monthly, quarterly) direct communication about progress with the site, its planning, and its accomplishments. This list should include the news media.
- Meet with news media representatives to generate stories about the site, its potential, and its partners. Work with the Saint Louis Zoo’s WildCare Park, surrounding cities, chambers of commerce, and other North County institutions and businesses to prepare joint stories to submit for news media publication.

# Alternative Land Use:

## Senior (55+) Residential with Agri-Living

Given some important circumstances of the housing market in North St. Louis County, such as housing ages, sizes, and relative values, an “easy” solution to the redevelopment of Jamestown Mall could be the creation of newer housing to potentially increase the number of higher quality options for North County residents. New housing might also be a catalyst to attract additional population to North County, which has experienced slight population declines in the last decade.

Public comments during the study period mitigate against a recommendation for “general” housing, however. There is concern that existing housing could be abandoned in favor of new housing in light of no net population growth on the horizon. This could result in more vacancies in older subdivisions leading to conditions of blight. Also, there is concern about owner-occupied housing converting to rental housing over time. (However, as shown in the market research in Part 3, newer housing with higher price points in north St. Louis County has kept very high owner-occupancy rates.)

There is an additional market challenge regarding “general” housing. Increased construction costs have pushed the price point of new single-family housing to the margins of what the north St. Louis County market will support.

Even with the concerns listed above, the residential scenarios received a substantial amount of favorability from the community. Thus, this report recommends a senior (55+) residential development with agri-living as an alternative land use if the AgTech/Ag-Food Technology Campus is not implemented.

Benefits of the Senior (55+) Agri-Living Residential include:

- Community perspective: More open to senior focused residential.
- Better alignment with market demand with a focus on growing senior population.
- Opportunities for retail/commercial amenities.
- Agri-Living can be a market differentiator.



# Community Perspective: More Open To Senior Focused Residential

There is a willingness expressed by the public to support more housing for senior citizens, if only to provide opportunities for elderly residents to remain in North County as their housing needs and physical/ mental capabilities change. Higher density housing for aging citizens is acceptable among the public. New and lower maintenance homes of greater density (units per acre) than prevalent elsewhere in North County could support “aging in place” without violating the general public’s concerns about additional housing. Existing homes occupied by senior citizens can be marketed toward younger families without the need for more single-family homes.

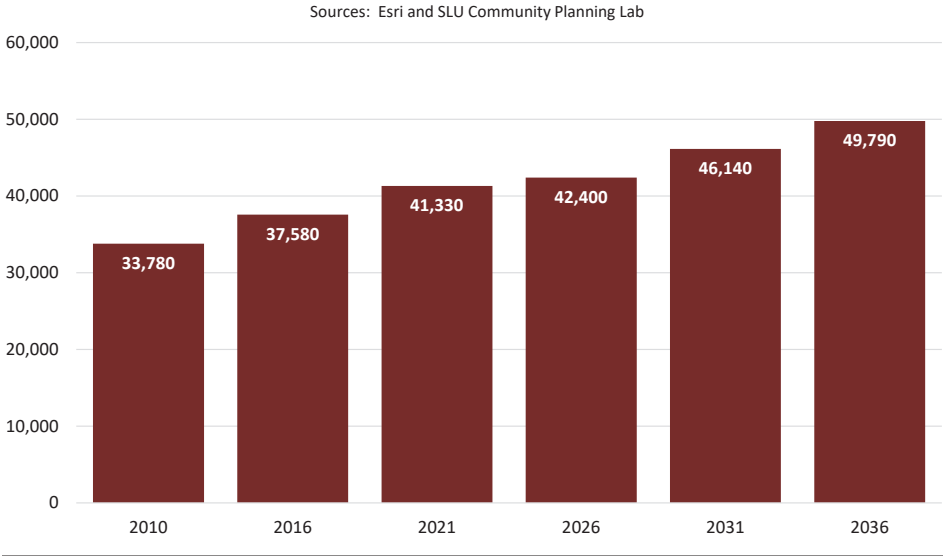
## Alignment With Growing Senior Population

The senior population is on the rise in North County, though this growth will be concentrated in “older” seniors for the next 15 years or so. These people are part of the post-World War II Baby Boom generation. The Boomers were followed by a smaller cohort.

While the population in general is not increasing in St. Louis County or North County, the population of older adults is increasing. Using a cohort-survival methodology, the number of north St. Louis County residents over the age of 55 is projected to increase from about 41,330 in 2021 to 49,790 in 2031, a jump of more than 20 percent.

This growth will be uneven by age cohort, however. As the baby boomer generation ages, so will the number of people over the age of 70. But smaller cohorts behind the baby boomers will result in declining numbers of people in North County between 55 and 70. Thus, the greatest housing need (opportunity?) is centered on the very old, who are also least likely to be able to maintain their current homes.

## TOTAL SENIOR POPULATION: 2010 TO 2036 NORTH ST. LOUIS COUNTY



*Above: The total senior population is projected to reach nearly 50,000 in North County by 2036, from just over 40,000 in 2021. This would be a 20.5% increase in 15 years. While equivalent projections for the entire North County population are not available, U.S. Census projections indicate that America’s total population will increase at only about half that rate.*



## Opportunities For Retail/Commercial Amenities

This scenario would also include a “village-scale” commercial center (best located on Lindbergh Boulevard as a re-branded entryway to the site) that is walkable from the senior housing with charming boutique shops and dining places. Walkability is important to minimize the number of on-site vehicle trips while encouraging healthy exercise among the senior residents. The commercial center would also welcome shoppers and diners from throughout North County and the region. Their vehicles, however, would not need to enter the senior housing neighborhoods.

That said, the prospective market for additional retail and dining options in North County is questionable. To date, retail and dining sales in the four zip codes that comprise almost all of North County north of I-270 are about 70 percent higher than the buying power of those zip codes would otherwise indicate. That is, North County retailing (mostly concentrated along Lindbergh Boulevard in Florissant and Hazelwood) is a major net attractor of consumers from other parts of the region—most probably from south of I-270. Attracting more shopping and dining establishments would be difficult in an already over-built environment.

## Agri-Living Can be a Market Differentiator

The scenario envisions a combination of senior living with “agri-living” that could be a market differentiator for the residential community. Agri-living residential communities are focused around working farms and/or community gardens. Residents find agri-living communities attractive because of their rural character, farm-to-table aspects, available open space, and amenities.

The twenty-plus acres of outlots at the Jamestown Mall site could serve as the primary area for the working farm. In addition, a potential customer for the working farm could be the nearby Saint Louis Zoo's WildCare Park, which could lend the agri-living development additional branding and cachet.

This alternative scenario goes further with outdoor recreation and exercise. A trail system through the Jamestown Mall site would inspire longer walks, particularly if the trail is lined with natural plantings and interesting architecture of on-site buildings.

