

COLUMBIA MILLS



A Comprehensive Site Profile for the Former Columbia Mills Industrial Site

**Town of Minetto, New York
Oswego County**

Prepared for:

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April 2013

FORMER COLUMBIA MILLS COMPREHENSIVE SITE PROFILE

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1.0 PROPERTY SUMMARY

| Table 1: Former Columbia Mills Industrial Site Property Summary | |
|--|--|
| General Location: | South of the City of Oswego adjacent to Lock O5 on the Oswego River in Minetto, New York |
| Site Ownership: | Operation Oswego County, Inc. (IDA) owns the entire 87 acre site, including the 7-acre target site |
| Address: | The Site is part of the former Columbia Mills plant at 2783 NY-48, Minetto, NY 13115 |
| Access: | Direct access to the Site is currently off the Minetto Senior Apartments driveway off NY-48 |
| Road Frontage: | Approximately 450 feet of road frontage along the NY-48 |
| Topography: | Primarily flat due to previous site use. Steep slopes limited to a small wetland outside the northern target site boundary |
| Hydrology: | Natural drainage flows to the north and western ends of the site towards wetland areas |
| Land Use: | Capped brownfield, vacant |
| Utilities: | Public water, sewer, electric, telephone, cable, gas and internet |
| Zoning: | Industrial |
| Site Improvements: | Demolition of structures associated with former Columbia Mills facility and contaminated site remedial work |
| Tax Map #'s: | 183.02-02-04.02 |

The target site is a vacant 7+/- acre portion of a larger 87-acre property located on the west side of NYS Route 48, approximately 800 ft. north of the intersection with County Route 24. The Oswego River is located immediately to the east and across NYS Route 48 from the site, adjacent to Lock O5. This site, owned by Operation Oswego County (County IDA), has become a high priority site due to its location between the population centers of Oswego and Fulton, the ability for expansion on the larger 80+/- acres, and its' proximity to water access across NYS Route 48.



Image 1: 7 Acre +/- Former Columbia Mills Industrial Site and Target Site

2.0 INTRODUCTION & BACKGROUND

Operation Oswego County, Inc. has identified the marketing and development of prime industrial and commercial opportunities as a priority in the larger economic development strategy for Oswego County. Specifically, the development of a vacant portion of land on the Former Columbia Mills site in the Town of Minetto has become a high priority due to its location between the population centers of Oswego and Fulton, and its' proximity to water access adjacent to the Hamlet of Minetto.

The property owned by Operation Oswego County (OOC), the County's Industrial Development Agency (IDA), that is the subject of this Site Profile is an approximately 7-acre vacant portion of a larger parcel located west of NYS Route 48, approximately 800 ft. north of the intersection with County Route 24. The subject property also lies just west of the Oswego River and Lock O5. In order to make the site more attractive to industries and developers, Operation Oswego County has authorized Barton & Loguidice, P.C (B&L) to develop a comprehensive informational package to identify and summarize necessary information in order to foster OOC's marketing efforts for the site.

The site was previously an industrial operation where prior structures have since been demolished. Surrounding land uses include commercial and residential – and due to this mix, the County desired to determine what future uses would be suitable for this property moving forward. As such, this Site Profile Report is also supported by a preliminary market evaluation, so that potential site redevelopment scenarios are in concert with general local and regional market data.

B&L's investigation of the Former Columbia Mills Site was conducted using a two-part process; an evaluation of published maps, plans and environmental records, and a site investigation. Aerial photos, soil maps, utility and infrastructure maps and plans, USGS topographic maps, wetland and floodplain data, Sanborn maps, boring samples, and other published information was reviewed as part of this Comprehensive Site Profile investigation.

The objective of this document is to clearly summarize findings associated with the evaluation of the site for prospective purchasers whom are interested in developing the site for industrial, commercial, or residential uses. A Phase I Environmental Site Assessment (ESA) was prepared as a separate standalone document and should be referenced for more detailed environmental data and findings related to the 7-acre target site. Furthermore, two full-size exhibits, Development Scenario A and Development Scenario B, have been prepared to graphically illustrate site development opportunities as a result of this investigation and to help convey the potential of the Former Columbia Mills Industrial Site. Half size exhibits are included in Appendix B. Lastly, boring log data for the site is included in Appendix C followed by supporting documentation in Appendix D.

3.0 SITE PROFILE

The information summarized in this section is an inventory of existing site conditions organized to effectively profile the site for Operation Oswego County, Inc. and prospective developers.

3.1 General Site Characteristics

The portion of the Former Columbia Mills site that is the subject of this Site Profile investigation is located in Oswego County, along the western side of NYS Route 48 in the Town of Minetto, New York. Generally, the site is comprised of an area of land bounded by NYS Route 48 / West River Road to the east, Snell Road / County Route 42 to the north, the former Erie Lackawanna Railroad bed on the west, and Benson Avenue / County Route 25 to the south. The site is directly adjacent to the Hamlet of Minetto and a bridge that crosses the Oswego River.

In order to understand the target site and surrounding area, a series of maps were prepared to analyze development opportunities and constraints. Those maps are provided in Appendix A. These maps were developed using published information about the site, including planning reports, aerial photographs, and various surveys previously prepared for the project area. It is important to note that conditions on the site have changed over time and the maps included in this Site Profile Report are intended to provide a general understanding of the site, and are not intended for use as a survey or for construction purposes.

Former factory buildings and the Brookfield Power hydropower station are located across NY-48 from the site. The Minetto Senior Apartments housing complex is located along the southern boundary of the site. Generally, the 7-acre target site consists of slabs and foundations of the former Columbia Mills factory buildings within an area characterized by rural development patterns. See Figure 1 in Appendix A for a regional overview of the target site's location within the Town and County.



*Image 2 (left): View looking east from the back of the property down the Minetto Senior Apartments access road.
Image 3 (right): View looking south across the site from the foundations of the former structures.*

3.2 Prior and Current Site Uses

Columbia Mills was a factory that manufactured vinyl window shades and coverlets and generated and disposed of assorted industrial wastes. The company closed in 1977, and the buildings on the property fell to ruin. The Site was briefly used for a salvage operation before ownership was transferred to Oswego County.

Currently, the 7-acre target site is vacant, accessible from a driveway on the western side of NYS Route 48 and a shared access road for the senior housing development to the south. The eastern portion of the site is a vegetated area along NYS Route 48; a utility panel was observed in this area, though it appeared to be out of service. Just adjacent to the western and northwestern target site boundaries appear to be wetlands with standing water present, apparently caused by beaver dams. Vegetation at the site appeared to be in good condition.

The majority of the site is comprised of concrete slabs and foundations remaining from former Columbia Mills buildings prior to demolition at the site. Stacks of concrete are located on the northern end of the site, leftover from the removal of slabs. A cast iron pipe that appeared to be related to a former sanitary system at the site was also observed on the western portion of the site, and two drains in the slabs on the western and northeastern portions of the site also appeared to be related to the sanitary system. Figure 2 in Appendix A further illustrates physical features present on the target site.

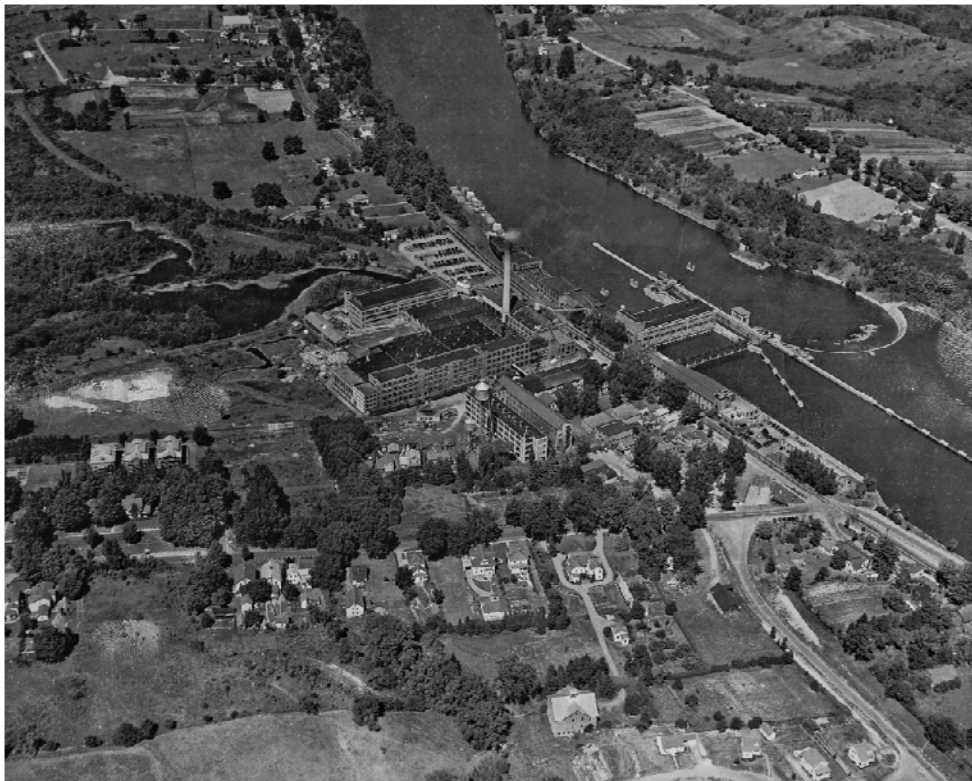


Image 4 (left): Aerial view of Columbia Mills factory (date unknown)

3.3 Site Topography

Based on field evaluations, the USGS topographic Oswego East quadrangle, and Light Detection and Ranging (LiDAR) technology, the site is primarily level with a very gradual slope towards the east as shown on Figure 3 in Appendix A. The site's steepest gradients, between 25 and 30 percent slopes, are relegated to a small area in the northern part of the target site adjacent to a wetland which is just outside the study boundary. Site elevation along its road frontage is between 309-feet and 314-feet, whereas the site's lowest elevation of 291-feet is situated in the aforementioned wetland outside the northern boundary.

Beyond the target site, topography to the east slopes steeply and steadily down to the Oswego River at 290-feet. To the west, terrain gently slopes downward into another wetland at 298-feet. Elevation increases to the north beyond the aforementioned wetland up to an elevation of over 320-feet. The neighboring parcel to the south, also part of the former Columbia Mills site, is also relatively flat and slightly lower in elevation as the terrain slopes gently downward.

3.4 Environmental Features

A Phase I Environmental Site Assessment (ESA) was performed pursuant to general accordance with the American Society for Testing and Materials (ASTM) "Standard Practice for Environmental Site Assessments: Phase I Environmental Site Assessment Process" (ASTM Designation E 1527-05). The Phase I ESA is provided under a separately bound cover and is intended to reduce the uncertainty regarding the potential occurrence of past release or potential future release of hazardous substances or petroleum by making appropriate and reasonable inquiry into the past and present uses of the site.

Generally, the larger Columbia Mills property has been the subject of environmental investigation since the 1970s. Columbia Mills operated at this location from 1879 until 1977, primarily manufacturing cloth and vinyl products. Manufacturing processes at the site included bleaching, drying, dyeing, calendaring, painting, rolling, and embossing.

Complaints by local citizens about hazardous chemicals remaining at the site following the factory's closure led to an inspection by NYSDEC in August 1982, where they determined that the wastes did not pose an imminent health hazard. However, a December 1982 visit by EPA estimated that there were up to 150 drums of undetermined wastes and up to 800 50-pound bags of starch used to stiffen paper; EPA's determination was confirmed by a study in March 1984, when it was determined that the site contained a large amount of waste in containers and in the soil, some of which was toxic.

An asbestos study was performed on the site in 1987 to evaluate whether salvage actions had caused the release of asbestos. The study indicated the presence of chrysotile, amosite, and crocidolite asbestos in roughly half of the areas tested, including in the air on and surrounding the site. In June 1996, EPA initiated a removal action at the site to demolish unsafe structures at the site and remove asbestos-containing material (ACM) and debris. This resulted in the demolition of all structures,

including those on the target property, except a single structure adjoining the target site to the south. This building was subsequently demolished for construction of the senior housing development.

Cleanup of the site began in the late 1980s, funded primarily by Columbia Mills. As described in the separately bound Phase I ESA report for this Site Profile, the larger 87-acre Columbia Mills site historically contained two ponds north of the target site used to store process water, and a five-acre landfill containing drums, ash, and debris was located west of the target property in a fenced area. The ponds have since been replaced with an amphibian breeding pond, and the landfill has been expanded to include a leachate collection system that is directed to the Minetto wastewater treatment plant.

The overall Columbia Mills site continues to be under management by NYSDEC. According to NYSDEC, a portion of the site is subject to deed restriction prohibiting soil and groundwater use at the property, due to the former Columbia Mills Company's status as a closed inactive hazardous waste site. From information provided by NYSDEC, the portion of the property under deed restriction appears to be less than 0.1 acres and is restricted to the footprint of former Building 15, which was located along the northern boundary of the site. This deed restriction is not expected to impact the proposed redevelopment of the site but will require coordination with NYSDEC to ensure that site soils and groundwater are handled in accordance with NYSDEC requirements during construction and long-term operation of the site.

Also, according to data from the National Wetlands Inventory, portions of the larger former Columbia Mills site is encumbered by federally-designated wetlands, however these are just outside the 7-acre target site to the north and west.

Other environmental features such as state wetlands and a 100-yr flood zone are present on nearby properties but do not appear to be existent on the site, as illustrated on Figure 4 in Appendix A. It is suggested users of this Site Profile document refer to the Phase I ESA for more detailed environmental information and findings pertaining to the 7-acre target site.

3.5 Soil Characteristics / Bearing Capacity

Mapping from the National Resource Conservation Service was used to determine preliminary soil characteristics on the former Columbia Mills site and is depicted on Figure 5 in Appendix A. Over 90 percent of the site rests on stable cut and fill land. The remainder of the site is made up of Ira gravelly fine sandy loam and water.

Cut and fill land is a member of Hydrologic Group C, meaning that water in this soil is transmitted downward slowly. Ira gravelly fine sandy loam is a member of Hydrologic Group D with very slow downward water transmission.

On January 22, 23, and 24, 2013, Lyon Drilling Company, Inc. advanced four (4) borings to depths ranging 8 to 20 feet below top of grade. The borings were located as follows; north-east corner, south-east corner, south-west corner, and north-west corner of the lot as illustrated in Figure 5. The borings were advanced using a truck-mounted CME-55 drill rig with 3 1/4 -inch diameter hollow stem auger

drilling techniques. Samples were obtained by driving a 2-inch diameter split-spoon sampler with a 140 pound hammer in accordance with ASTM D-1586 (Standard Penetration Test). The hammer blows recorded for each six inch interval during sampling from the 6-inch to 24-inch interval are referred to as “Penetration resistance” and are designated as the “N value” on the boring logs, which are provided in Appendix C. The N value is utilized as the index of soil density, consistency, and strength. The N values presented on the boring logs have not been corrected and are field values.

At the bottom of the boring level the driller encountered soils consisting of saturated brown fine to coarse sand with little fine gravel and possible sandstone. The blow counts at this level achieved an average N value of 39. The bearing material located at 6 feet below grade consisted of moist brown fine sand, trace silt, and fill materials with an average N value of 10. The lowest N value at 6 feet was in the north-west quadrant with an N-Value of 5.

The borings logs and related information depict subsurface conditions only at the specific locations and time indicated. Subsurface conditions and water elevations at other locations may differ from conditions at the location where sampling was conducted. The passage of time also may result in changes in the conditions interpreted to exist at the locations where sampling was conducted.

Soil samples obtained during drilling were classified by the driller’s observation using the Unified Soil Classification System in accordance with ASTM D-2487.

Groundwater was encountered at an average depth of 6 feet, however, the groundwater table will vary with the seasons and changes in precipitation patterns and may be higher during the wetter seasons. Subsurface conditions and water levels at other locations may differ from conditions at the locations where sampling was conducted. The passage of time also may result in changes in the conditions interpreted to exist at the locations where sampling was conducted.

Two scenarios were investigated for future construction on the 7-acre target site. Scenario-A consisted of a 125’x80’ building two stories tall for a total square footage of 20,000 ft². The foundation would be three rows of columns parallel to the 125’ wall with columns spaced at 15’-7 1/2” along the two outside walls and center interior. Scenario-B consisted of a 240’x65’ building two story tall for a total square footage of 30,000 ft². The two long walls would be continuous bearing. To reach a depth greater than extreme frost penetration both foundations will reach at least 5’.

Design loads for both buildings were assumed for a light commercial building with dead loads consisting of 15psf for the interior floors and roof, live load of 100psf for the interior floors, and a balanced snow load of 42psf based on a 60psf ground snow load. All loads and design were based on The 2010 New York State Building Code and ASCE 7-05.

For scenario-A it was found a square footing of 10’x10’ for interior columns and 7’x7’ for external columns would likely be required. For Scenario-B it was found a continuous footing of 3’ in width would be satisfactory. Calculations for both scenarios were based on a depth of 5’ for both foundations with assumed cohesionless soils, an effective friction angle of at least 30°, and effective unit weight of

105pcf. Per NYS building code section 1804.2; the maximum allowable foundation pressure for supporting soils at or near the surface shall not exceed 2,000psf for sand and silty sand soils unless data to substantiate the use of higher values is submitted and approved. Our analysis found a higher bearing capacity may be substantiated; however, further testing by a geotechnical engineer would need to be performed. A maximum bearing pressure of 2,000psf was assumed for the purpose of the foundation design.

The boring logs depict subsurface conditions for specific locations and dates. The recommendations and observations presented assume that significant variations do not occur at the site. Non-uniform conditions, however, cannot be ruled out by the methods of investigation performed.

3.6 Site Utilities

Existing utility information was obtained through as-built plans, survey's and interviews with individual service providers. Based on review of available utility data for the area, there are adequate utilities to serve the potential needs of likely site redevelopment scenarios. Approximate utility locations are shown on Figure 6 in Appendix A and further summarized below.

Electric Service

34.5 kVA overhead electrical service is provided to the former Columbia Mills site along the east side of NYS Route 48. Historically, electrical service has been provided by the hydroelectric generation plant located directly across NYS Route 48 from the target site on the Oswego River and produced 8000kw of electricity to the regional grid system. That electricity was then conveyed to the Seneca Hill Substation off of County Route 42 for distribution. Further, immediate access to a 4800 volt dual feed system is available in either single or three phase systems and can be accessed along the north, east, and southern boundaries of the larger Columbia Mills property. Generally, electrical availability and capacity is sufficient for most any type of future redevelopment on not only the initial 7-acre target site that is the subject of this Site Profile, but also the larger former Columbia Mills industrial property.

Gas Service

There is a 6" distribution line located along the west side of NYS Route 48 parallel to the target site's road frontage. Also, there is a 12" high pressure transmission line present on the east side of NYS Route 48.

Municipal Water Supply

The Onondaga County Water Authority (OCWA) and its wholesaler, the Onondaga County Metropolitan Water Board (MWB), provide water service to the Minetto area. The closest tank operated by OCWA is located on Tug Hill Road in the Town of Oswego, about 5 miles north from the subject property. A 54-inch Metropolitan Water Board water transmission line parallels the former Erie Lackawanna railroad tracks to the west of the target site adjacent to the larger Columbia Mills property line. Important to note is that additional abandoned water lines may be present beneath the former structures on the 7-

acre target site near the NYS Route 48 roadway. Currently, potable water is supplied directly to the site by a 12-inch transmission line which conveys water along NY-48.

The OCWA indicates that a 500,000 gallon per day max would likely be available to the site based on current average daily demands for water service in the area. However, if needed and with an appropriate infrastructure investment, a one million gallon per day service levels or potentially higher could be supplied. This is important for the County when considering full buildout of the larger former Columbia Mills industrial site.

Municipal Sewer

The sanitary sewer system is comprised of 10- and 15-inch trunk lines, a pumping station, a force main, a sewage treatment plant just to the north of the target site and to the south of County Route 42, and an 18-inch outfall sewer. Stormwater from the site is collected along the roadway collection system, conveyed under NYS Route 48 via culvert structures and discharged into the Oswego River. The Town of Minetto Wastewater Treatment Plant (WWTP) has two tanks, each with a daily capacity of 600,000 gallons. It is currently using one tank and is operating at 25% of its capacity.

Telecommunications

Overhead cable television and internet lines owned by Time Warner Cable are present on the east side of NYS Route 48 across from the target site. Also, overhead and underground lines owned by Verizon are present for telephone and internet services to the Columbia Mills site.



Image 4: Transformer box and electrical meter on site

3.7 Zoning and Land Use

The site, being located in the Town of Minetto, is subject to local zoning regulations and coverage requirements. Likely due to the former Columbia Mills industrial operation, the site is zoned Industrial (IN). The following uses are identified as permitted uses within the Town's Industrial District:

- Enclosed Manufacturing Industries;
- Enclosed Warehouse or Wholesale Use;
- Public Utility;
- Enclosed Service and Repair;
- Enclosed Industrial Processes and Services;
- Machinery and Transportation Equipment, Sales, Service and Repair;
- Freight or Trucking Terminal;
- Garage;
- Gasoline Station, Car Wash;
- Parking; and
- Accessory Use.

Based on the site already being zoned Industrial (IN), no zone change request applications would be required by the Town of Minetto for future industrial development uses.

Furthermore, minimum bulk requirements per the Town's zoning code are as follows:

| | |
|-----------------------|----------------|
| Lot Area Minimum: | 10,000 sq. ft. |
| Lot Frontage Minimum: | 75 ft. |
| Lot Depth Minimum: | 125 ft. |

Setback Requirements –

| | |
|-----------------------------|---|
| Front Yard Minimum: | 30 ft. |
| Rear and Side Yard Minimum: | 20 ft., or 30 ft. when abutting residential districts |

| | |
|-------------------|-----|
| Coverage Maximum: | 40% |
|-------------------|-----|

| | |
|--------------------------|--|
| Building Height Maximum: | Two stories or 45 ft., whichever is less |
|--------------------------|--|

Land use in the vicinity of the site is a mixture of residential, commercial, industrial, civic, and vacant uses. Brookfield Power now operates the hydroelectric dam on the Oswego River just across NY-48 from the target site. Many of the former factory buildings between NY-48 and the river are either used as storage space or are vacant. The Minetto Senior Apartments are just south of the subject property. The Minetto Volunteer Fire Department building is adjacent to the southwestern corner of the site and a single family residential property borders the northeastern corner of the site. The north and west boundaries of the 7-acre target site are buffered by woodlands and ponds stretching west to the

railroad line and north to the Town of Minetto wastewater treatment facility. Figures 7 and 8 in Appendix A graphically illustrate land use and zoning attributes on and adjacent to the target site.

3.8 Transportation Infrastructure

From a transportation perspective, the site is geographically located in the Northeastern United States and within close proximity to Southeastern Canada. A complete transportation network is available including highways, water, rail and air to provide fast and efficient movement of products and raw materials.

Summarized below is a cross section of the transportation infrastructure in proximity to the Former Columbia Mills site. These features are also illustrated on Figure 8 in Appendix A.

Highway

The site is located strategically in close proximity to both County and State highways.

- NYS Route 48 runs north-south along the site's immediate eastern boundary. NY-48 connects the Cities of Oswego and Fulton.
- NYS Route 481 runs parallel to NY-48 on the east side of the Oswego River and is located approximately one mile to the east of the site.
- The Minetto Bridge is about .25 miles south of the site and is the only crossing on the Oswego River between the Cities of Oswego and Fulton.
- Interstate 81 is approximately 23 miles to the east, providing access to northern New York and Canada as well as downstate New York and Pennsylvania.
- The New York State Thruway (I-90) is approximately 24 miles to the south, providing access to Syracuse, Rochester, Buffalo, Utica, and Albany.

Railroad

A rail line runs just to the west of the target site, connecting the City of Oswego with points south and beyond. This line is approximately one half mile away from the target property. Rail spurs into the 7-acre target site area connected the former Columbia Mills facility with this line in the past. Further site investigation is needed to determine the condition of these sidings.

Across the Oswego River, a north-south rail line extends northward to East Oswego and along the eastern Lake Ontario shoreline from points south. This line is approximately one mile to the east of the target site.

Airports

The Oswego County Airport is a general aviation facility located approximately 7 miles to the southeast of the site just outside the City of Fulton. Additionally, full commercial flight service is available at Syracuse Hancock International Airport, which is located approximately 31 miles to the south in the Town of Salina just outside the City of Syracuse.

Water-based Ports

The Port of Oswego is located approximately 5 miles to the north of the site at the outlet of the Oswego River. The Port includes a wharf which is an intermodal facility providing transportation connectivity from water to land via highway and railroad.

Additionally, the Oswego River/Oswego Canal is located a few hundred feet from the target site. Lock O5 of the NYS Canal System is also located in Minetto.

4.0 MARKET ANALYSIS

As part of the Former Columbia Mills Site Profile, a preliminary economic and market analysis was conducted to begin assessing viable options for redevelopment of the former industrial site in the Town of Minetto, Oswego County, New York. The analysis included an examination of demographics, local, and regional market data provided by the Bureau of Labor Statistics, a Shift-Share Analysis, and Esteban-Marquillas Extension assessment methods. Economic figures for Oswego County and for the Syracuse MSA were used as proxies for market conditions around the target site. It was determined that the local Minetto economy in the vicinity of the site mirrored that of the County and MSA, albeit at a smaller scale.

The market analysis section will first establish existing market conditions using 2011 employment data. It will then apply predictive economic measures to address potential future uses for the site. A list of potential target industrial will be produced, categorized as high-performing sectors or emerging sectors in the Oswego County and Syracuse MSA region.

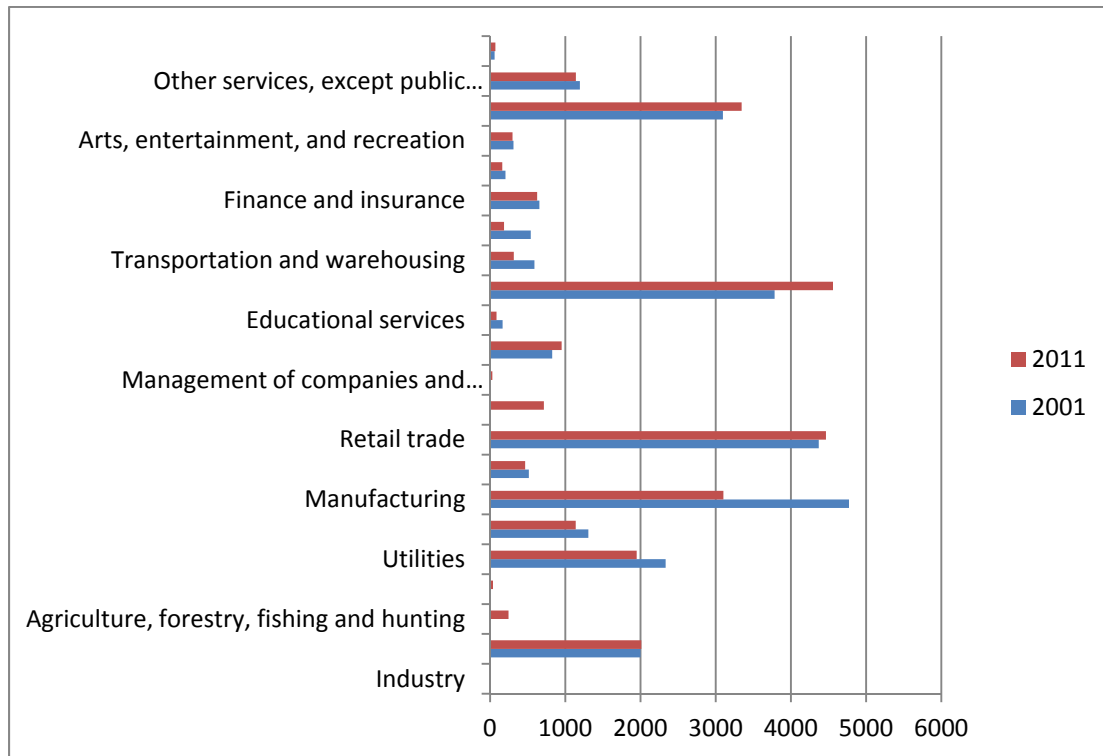
4.1 Existing Economic Conditions

Oswego County

The Port of Oswego and the NYS Canal System helped make Oswego County and the Syracuse MSA hot beds of manufacturing during the 19th and 20th centuries. Today, they continue an economic restructuring away from heavy reliance on the manufacturing sector.

In 2001, manufacturing and retail trade employed the most people in Oswego County. However, with the closing or cutting of work forces of several large manufacturing facilities in Oswego County between 2001 and 2011, employment in manufacturing declined by over 35 percent, on par with New York State trends. The health care, accommodation and food service, and administrative and waste sectors each experienced moderate increases in employment over the 10-year period. By 2011, health care had overtaken manufacturing and retail as the largest employment sector in the county.

Table 2: Oswego County Employment Trends 2001-2011



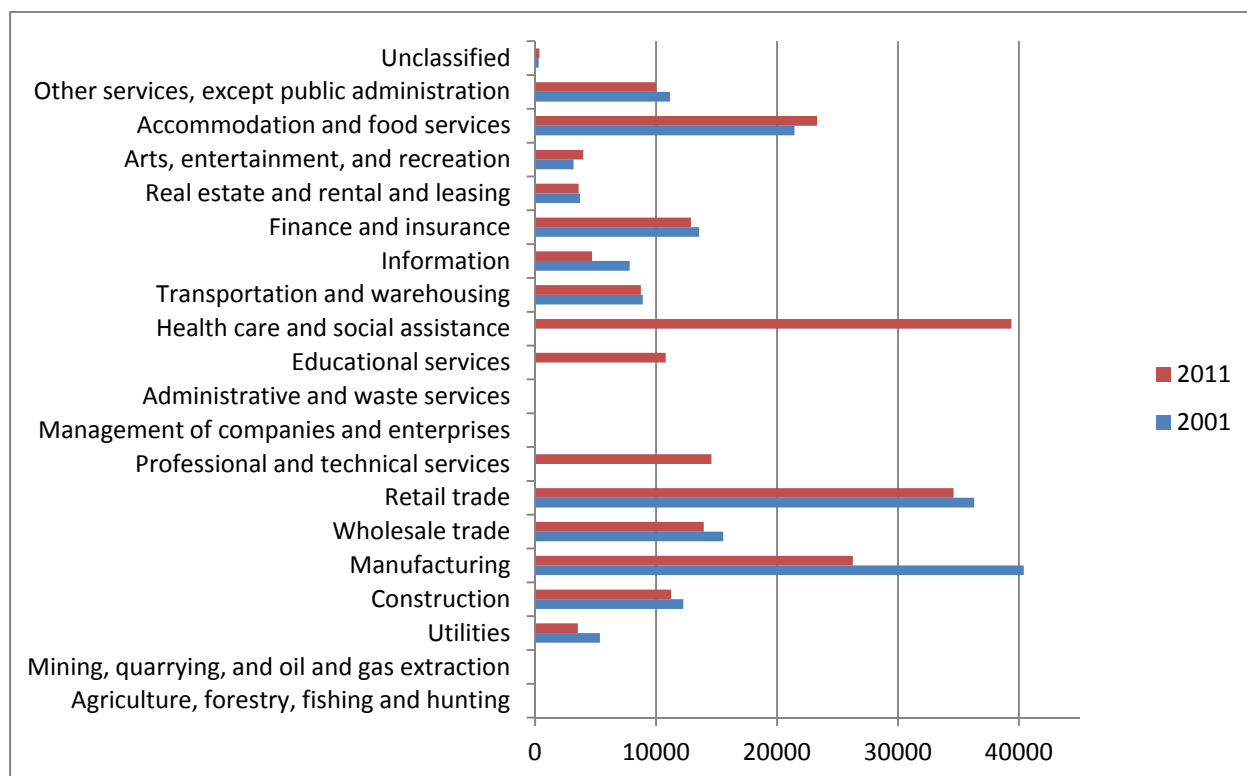
Source: Bureau of Labor Statistics

Syracuse MSA

The Syracuse MSA, which includes Onondaga, Madison, and Oswego Counties, continued similar employment reductions in manufacturing industries between 2001 and 2011. The MSA lost 35% of its manufacturing jobs over the 10-year period. While this mirrored trends statewide, the Syracuse utilities industry lost employment at nearly 3 times the NYS average rate and losses in the information sector doubled the state.

Accommodation and food service and arts and entertainment were among industries to fair well over the first decade of the 21st century. Health care and social assistance was the sector of largest employment in 2011.

Table 3: Syracuse MSA Employment 2001-2011



Source: Bureau of Labor Statistics

The restructuring of the regional economy has precipitated this analysis. Minetto was once a factory town on the banks of the Oswego River, utilizing low-cost electricity via a hydro-electric power dam, which is directly adjacent to the former Columbia Mills site. When the factory ceased operations in the 1970s, industry has struggled to fill the void left behind. With extensive environmental cleanup and land clearance, the former Columbia Mills site is poised to rejoin the real estate market.

Location Quotient

Location quotients reveal which industries have a particularly high level of employment relative to the size of the local economy. Using New York State as a basis, the location quotient measured employment share for industries in Oswego County and the Syracuse MSA using Bureau of Labor Statistics data. While not an indicator of future job growth in itself, the location quotient helps to establish which local industries employ more or less people than would be expected when compared to a benchmark economy; in this case, the New York State economy. Industries with a location quotient greater than one have a larger employment share than would be expected based on state levels while those lower than one indicate less employment than would be expected.

Table 4: Location Quotient by Local Industries

| Industry | Oswego County, New York | | | Syracuse, NY MSA | | |
|--|-------------------------|-------|----------|------------------|------|----------|
| | 2001 | 2011 | % Change | 2001 | 2011 | % Change |
| NAICS 11 Agriculture, forestry, fishing and hunting | ND | 3.13 | - | ND | ND | - |
| NAICS 21 Mining, quarrying, and oil and gas extraction | ND | 2.4 | - | ND | ND | - |
| NAICS 22 Utilities | 14.93 | 15.49 | 3.75% | 3.47 | 2.79 | -19.60% |
| NAICS 23 Construction | 1.08 | 1.09 | 0.93% | 1.03 | 1.07 | 3.88% |
| NAICS 31-33 Manufacturing | 1.86 | 2 | 7.53% | 1.6 | 1.69 | 5.62% |
| NAICS 42 Wholesale trade | 0.38 | 0.42 | 10.53% | 1.15 | 1.24 | 7.83% |
| NAICS 44-45 Retail trade | 1.38 | 1.48 | 7.25% | 1.16 | 1.14 | -1.72% |
| NAICS 48-49 Transportation and warehousing | 0.7 | 0.43 | -38.57% | 1.07 | 1.17 | 9.35% |
| NAICS 51 Information | 0.46 | 0.22 | -52.17% | 0.67 | 0.54 | -19.40% |
| NAICS 52 Finance and insurance | 0.32 | 0.37 | 15.63% | 0.68 | 0.76 | 11.76% |
| NAICS 53 Real estate and rental and leasing | 0.31 | 0.27 | -12.90% | 0.57 | 0.6 | 5.26% |
| NAICS 54 Professional and technical services | ND | 0.37 | - | ND | 0.75 | - |
| NAICS 55 Management of companies and enterprises | ND | 0.07 | - | ND | ND | - |
| NAICS 56 Administrative and waste services | 0.52 | 0.66 | 26.92% | ND | ND | - |
| NAICS 61 Educational services | 0.19 | 0.08 | -57.89% | ND | 1.04 | - |
| NAICS 62 Health care and social assistance | 0.95 | 1.03 | 8.42% | ND | 0.89 | - |
| NAICS 71 Arts, entertainment, and recreation | 0.69 | 0.62 | -10.14% | 0.71 | 0.83 | 16.90% |
| NAICS 72 Accommodation and food services | 1.65 | 1.58 | -4.24% | 1.16 | 1.1 | -5.17% |
| NAICS 81 Other services, except public administration | 1.05 | 1.03 | -1.90% | 0.99 | 0.89 | -10.10% |
| NAICS 99 Unclassified | 0.7 | 0.73 | 4.29% | 0.33 | 0.37 | 12.12% |

Note: Green cells indicate high local employment shares.

Source: Bureau of Labor Statistics

Both the County and MSA maintain high location quotients in manufacturing even as the sector continues to decline. This will likely result in continued job losses in that sector. Utilities, accommodation and food services, and retail trade hold high employment shares in Oswego County. This may be due to the prevalence of the nuclear energy industry in the region. The Syracuse MSA also has high location quotients in utilities and in wholesale trade and transportation and warehousing as well.

Low location quotients in fields such as finance and insurance and professional and technical services within both areas suggest that employment in these sectors is below what would be expected. The education sector in Oswego County and the health care sector in Syracuse each have curiously low location quotients as well. As a result, such industries could be under-serving local demand and may be poised for emergence as growth industries.

4.2 Cluster Analysis

Beginning with these employment figures and location quotients, more advanced measurements for predicting future sector behavior were determined for Oswego County and the Syracuse MSA. The Shift-Share Analysis and Esteban-Marquillas Extension methods were utilized to develop locally-relevant industrial cluster analysis. This analysis can be used to help guide policy intervention from the municipal level, but also can be used to assess which industries the study area should target in implementing revitalization plans.

In Oswego County, economic mainstays manufacturing and retail have been relegated to “transforming” sectors, needing to reorient or restructure themselves in order to be more competitive in the regional and statewide economy.

The County holds a critical industry as a “star” sector. Health care and social assistance is the sole industry functioning at an optimal level in the local economy as a highly competitive industry with high local concentration compared to the state average. As a nationally growing industry, it figures to continue this growth as the baby-boomer generation ages and increases demand on such services. The current strength in this sector positions the MSA to take further advantage of growth in the health care industry. Wholesale trade, finance and insurance, and administrative and waste services are categorized as “emerging” sectors that are operating competitively but are low in local concentration. These industries may increase in importance in the future in terms of local employment.

Table 5: Oswego County Industrial Cluster Analysis

| | Not Competitive | Competitive |
|--------------------------|---|---|
| High Local Concentration | <i>Transforming Sectors</i> <ul style="list-style-type: none"> • Manufacturing • Retail Trade • Utilities • Accommodation and Food Services • Construction • Transportation and Warehousing | <i>“Star” Sectors</i> <ul style="list-style-type: none"> • Health Care and Social Assistance |
| Low Local Concentration | <i>Declining Sectors</i> <ul style="list-style-type: none"> • Real Estate, Rental, and Leasing • Information • Arts and Entertainment • Education Services | <i>Emerging Sectors</i> <ul style="list-style-type: none"> • Wholesale Trade • Finance and Insurance • Administrative and Waste Services |

Syracuse’s geographic position at the crossroads of Interstates 90 and 81 and in the center of New York State is reflected in its “star” sectors of wholesale trade and transportation and warehousing. Manufacturing and retail trade maintain their places as locally concentrated industries despite significant job loss over the past decade. While data availability prevents health care from appearing on this table, it now is the sector of greatest employment in Syracuse.

Finance and insurance and arts, entertainment, and recreation are emerging industries in the area with concentration below what would be expected when compared to the state benchmark. In addition to manufacturing and retail trade, industries like utilities, construction, and accommodation and food services are transforming industries existing in high local concentration but lacking in statewide competitiveness.

Table 6: Syracuse MSA Industrial Cluster Analysis

| | Not Competitive | Competitive |
|--------------------------|---|--|
| High Local Concentration | <i>Transforming Sectors</i> <ul style="list-style-type: none"> Utilities Retail Trade Manufacturing Construction Accommodation and Food Services | <i>“Star” Sectors</i> <ul style="list-style-type: none"> Wholesale Trade Transportation and Warehousing |
| Low Local Concentration | <i>Declining Sectors</i> <ul style="list-style-type: none"> Information Real Estate, Rental, and Leasing Other services, except public admin. | <i>Emerging Sectors</i> <ul style="list-style-type: none"> Finance and insurance Arts, Entertainment, and Recreation |

4.3 Potential Policy Implications

These findings can have a variety of impacts on local policy making. It is important for local policy makers to focus their efforts on industries that show growth potential but are not yet saturated locally. Referring to the cluster analysis charts, focus should be placed on “emerging sectors.” Industries that are already competitive and highly concentrated locally are functioning well and may not require any policy intervention. “Transforming sectors” are no longer competitive but remain highly concentrated, potentially requiring policy interventions to assist these stalwart industries in rejuvenating their business cycle locally. Declining sectors lack local concentration but also lack competitiveness. This may question the sustainability of these industries and the sustainability of any local policy intervention.

Should intervention be deemed appropriate by the Town, County, or Central New York Regional Economic Development Council, strategies to augment the performance of target industries include:

- 1) Build specialized infrastructure (transportation, telecommunications, regulatory environments, etc.);
- 2) Fill missing links in supply chains with targeted firm attraction;
- 3) Increase workforce skills and training to prepare for industries that are likely to grow; and,
- 4) Engage in a cluster marketing program.

Initiatives to redevelop the former Columbia Mills Industrial site in Minetto must be cognizant of potential policy interventions. Such efforts should also exert energy to influence policy changes so that they are advantageous to development of the site.

Generally, emerging sectors or transforming sectors that are likely to be targeted with public policy intervention include manufacturing, retail trade, utilities, construction, accommodation and food services, and finance and insurance in both Oswego County and in the Syracuse MSA. Additionally, transportation and warehousing is classified as transforming while wholesale trade and administrative and waste services are listed as emerging in the County. Also, the arts, entertainment, and recreation sector is categorized as emerging in the Syracuse MSA.

4.4 Organizational Stakeholders

As marketing for redevelopment of the site continues, the input of potentially significant stakeholders should be solicited in an effort to engage the community, promote redevelopment through such organizations, and ultimately to ensure the long term viability of the site. They are as follows:

- Town of Minetto
- Minetto Fire Department
- National Grid
- NYS Canal Corporation
- Minetto Midway Drive-In
- Minetto Senior Apartments
- SUNY Oswego
- Greater Oswego-Fulton Chamber of Commerce

4.5 Potential Target Industries

Armed with knowledge of regional industrial trends and potential policy interventions, more precise data allows target industries to be uncovered. Using Bureau of Labor Statistics data, this time at a more precise subsector level, high-performing sectors that may seek expansion at the target site were identified. Subsequently, attention was given to “emerging” sectors, industries that hold comparative advantage and lack expected local concentration. These industries are also identified and provide opportunities for Oswego to anticipate market trends. Examining further, acknowledgement was given to the site’s rural environment for both high-performing and emerging industry analysis in order to remove industries that are commonly urban in nature.

The resulting list of potential target industries for the former Columbia Mills Site, that are performing at optimum levels in the region, is as follows:

(NOTE: industry descriptions are as described by the 2012 NAICS Definitions of the US Census Bureau)

Health Care and Social Assistance

This sector is among the high-performing industries in Oswego County and is among the leading employers in the Syracuse MSA. The site is located adjacent to the Minetto Senior Apartments and within one mile of the Manor at Seneca Hill.

- Ambulatory Health Care Sector - Provide health care services directly or indirectly to ambulatory patients and do not usually provide inpatient services. Health practitioners in this subsector provide outpatient services, with the facilities and equipment not usually being the most significant part of the production process.
- Hospitals – Provide medical, diagnostic, and treatment services that include physician, nursing, and other health services to inpatients and the specialized accommodation services required by inpatients. Hospitals may also provide outpatient services as a secondary activity.
- Nursing and Residential Care Facilities – Provide residential care combined with either nursing, supervisory, or other types of care as required by the residents. In this subsector, the facilities are a significant part of the production process and the care provided is a mix of health and social services with the health services being largely some level of nursing services.
- Social Assistance - Provide a wide variety of social assistance services directly to their clients including services for the disabled, meal delivery programs, food banks, community meals, emergency and transitional housing, vocational rehabilitation, and child day care. These services do not include residential or accommodation services, except on a short stay basis.

Merchant Wholesales for Nondurable Goods

- Nondurable goods are items generally with a normal life expectancy of less than three years.
- Nondurable goods merchant wholesale trade establishments are engaged in wholesaling products, such as paper and paper products, chemicals and chemical products, drugs, textiles and textile products, apparel, footwear, groceries, farm products, petroleum and petroleum products, alcoholic beverages, books, magazines, newspapers, flowers and nursery stock, and tobacco products.

The resulting list of potential target industries for the former Columbia Mills Site, that are emerging sectors in the region, is as follows:

Administrative and Support Services

- The processes employed in this sector (e.g., general management, personnel administration, clerical activities, cleaning activities) are often integral parts of the activities of establishments found in all sectors of the economy.
- The establishments classified in this subsector have specialization in one or more of these activities and can, therefore, provide services to clients in a variety of industries and, in some cases, to households.
- Many of the activities performed in this subsector are ongoing routine support functions that all businesses and organizations must do and that they have traditionally done for themselves. Recent trends, however, are to contract or purchase such services from businesses that specialize in such activities and can, therefore, provide the services more efficiently.

Real Estate

- Industries in the Real Estate subsector group establishments that are primarily engaged in:
 - Renting or leasing real estate to others;
 - Managing real estate for others;
 - Selling, buying, or renting real estate for others; and
 - Providing other real estate related services, such as appraisal services.
- This subsector includes equity Real Estate Investment Trusts (REITs) that are primarily engaged in leasing buildings, dwellings, or other real estate property to others.

Credit Intermediation

- Industries in the Credit Intermediation and Related Activities subsector group establishments that:
 - Lend funds raised from depositors;
 - Lend funds raised from credit market borrowing;
 - Facilitate the lending of funds or issuance of credit by engaging in such activities as mortgage and loan brokerage, clearinghouse and reserve services, and check cashing services.

Heavy and Civil Engineering Construction

- The Heavy and Civil Engineering Construction subsector comprises establishments whose primary activity is the construction of entire engineering projects (e.g., highways and dams), and specialty trade contractors, whose primary activity is the production of a specific component for such projects.
- Specialty trade contractors in Heavy and Civil Engineering Construction generally are performing activities that are specific to heavy and civil engineering construction projects and are not normally performed on buildings.
- The work performed may include new work, additions, alterations, or maintenance and repairs. Specialty trade activities are classified in this subsector if the skills and equipment present are specific to heavy or civil engineering construction projects. For example, specialized equipment is needed to paint lines on highways. This equipment is not normally used in building applications so the activity is classified in this subsector.
- Construction projects involving water resources (e.g., dredging and land drainage) and projects involving open space improvement (e.g., parks and trails) are included in this subsector. Establishments whose primary activity is the subdivision of land into individual building lots usually perform various additional site-improvement activities (e.g., road building and utility line installation) and are included in this subsector.

Chemical Manufacturing

- The Chemical Manufacturing subsector is based on the transformation of organic and inorganic raw materials by a chemical process and the formulation of products. This industry group comprises establishments primarily engaged in manufacturing chemicals using basic processes, such as thermal cracking and distillation. Other subgroups include:
 - Resin, synthetic rubber, and artificial synthetic fibers and filaments manufacturing;
 - Pesticide, fertilizer, and other agricultural chemical manufacturing;
 - Pharmaceutical and medicine manufacturing;
 - Paint, coating, and adhesive manufacturing;
 - Soap, cleaning compound, and toilet preparation manufacturing; and
 - Other chemical product and preparation manufacturing.

Amusements, Gambling, and Recreation

- Operate facilities where patrons can primarily engage in sports, recreation, amusement, or gambling activities; and/or

- Provide other amusement and recreation services, such as supplying and servicing amusement devices in places of business operated by others; operating sports teams, clubs, or leagues engaged in playing games for recreational purposes; and guiding tours without using transportation equipment.

5.0 SUMMARY OF DEVELOPMENT ASSETS AND LIMITATIONS

The target site on a portion of the former Columbia Mills property as outlined in this report has several development assets that would benefit a potential purchaser of the property for industrial or commercial use.

Site Development Assets

- At approximately 7 acres, the site has sufficient buildable area to accommodate a moderately sized industrial and/or commercial development operation including associated parking, on-site stormwater systems, setbacks, landscaping and amenities.
- Due to the abundance of vacant land on the remaining 80+/- acres of the former Columbia Mills site, future businesses on the site would have an opportunity for expansion within close proximity of the target site.
- Despite having generally non-compatible residential land uses immediately to the southwest and north of the target site, there exists an abundance of woodland areas within and surrounding the site that could provide a natural buffer between future developments on the site and neighboring property.
- The vast majority of the site is generally flat with gentle slopes throughout.
- Natural drainage patterns gently slope towards the wetlands adjacent to the target site. With proper stormwater management design, the location of the wetlands will aid future development and the collection, filtration, conveyance, and discharge of future stormwater systems.
- All requisite utilities and associated flow capacities needed to accommodate a light to moderate industrial operation on the site are present either right up to the site or within close proximity. Connecting to existing utilities would be a nominal cost for future construction.
- The site is currently zoned Industrial. As such, no zone changes or variances would be required for future industrial or commercial development on the site.
- The site is fully equipped with access to all major transportation modes, including water, rail, air, and highway.

Site Development Limitations

- Underground water lines that remain from the former Columbia Mills factory buildings may still exist, however the presence of these lines will not necessarily inhibit potential future development. If anything, future builders will need to be mindful of their locations.
- A Phase II ESA conducted by ENSR in 2006 identified low-level metal and SVOC exceedances in soil and groundwater in the southeastern corner of the target site near NY Route 48. The remainder of the target site was not evaluated as part of that investigation. As a result, and despite our belief that gross contamination is not present on the remainder of the target site, a Phase II investigation should be conducted to confirm our findings and opinions in this regard.
- Although a very minor development limitation, it should be noted that according to NYSDEC, a portion of the site is subject to deed restriction prohibiting soil and groundwater use at the property, due to the former Columbia Mills Company's status as a closed inactive hazardous waste site. From information provided by NYSDEC, the portion of the property under deed restriction appears to be less than 0.1 acres and is restricted to the footprint of former Building 15, which was located along the northern boundary of the site. This deed restriction is not expected to impact the proposed redevelopment of the site but will require coordination with NYSDEC to ensure that site soils and groundwater are handled in accordance with NYSDEC requirements during construction and long-term operation of the site.

To conclude, this Comprehensive Site Profile finds that the target site has several assets that benefit a potential buyer or developer with little development limitations at this time. Strategic highway access, an abundance of road frontage, existing utilities, and sufficient buildable space on site allow for a flexible approach to future development scenarios that best fit with the intent of the Town of Minetto, Oswego County and the surrounding area.