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August 11, 2015

TO: Interested Parties

THROUGH: Jason Mickel, Water Supply Manager, Water Resources Bureau

FROM: Jay Yingling, Senior Economist, Water Resources Bureau
Kevin Wills, Senior Economist, Water Resources Bureau
Yassert Gonzalez, Senior Economist, Water Resources Bureau

SUBJECT: 2015 Regional Water Supply Plan: Industrial/Commercial, Power Generation and Mining/Dewatering Demand Projections

Introduction

Chapter 373, Florida Statutes (F.S.) sets forth the requirement for regional water supply planning. Under the provisions of this chapter, a Regional Water Supply Plan (RWSP) must be developed for those areas where available water supplies are not expected to meet projected demands over a 20-year planning horizon. The statute requires that the determination of the need for a RWSP be made every five years. Guidance for developing projections is contained in the publication, Format and Guidelines for Regional Water Supply Plans (Florida Department of Environmental Protection (DEP) et al., June 2009). This guidance document was produced by representatives from the DEP and each of the five water management districts. Following a Districtwide water supply assessment that identified water demands and existing sources, the Governing Board of the Southwest Florida Water Management District (SWFWMD or District) determined the need for a RWSP in the southern ten counties of the District, and the District produced its first RWSP in 2001. Starting with the 2010 edition of the RWSP, as directed by the Governing Board, District staff included demand projections for all sixteen counties within the District.

Purpose

This memo details the methodology used to develop water demand projections for industrial/commercial (I/C), power generation (PG), and mining/dewatering (M/D) interests within the District. I/C uses include chemical manufacturing, food processing, and miscellaneous I/C uses. While diversified, much of the water used in food processing can be attributed to citrus and other agricultural crops. For the most part, chemical manufacturing is closely associated with phosphate mining and consists mainly of phosphate processing. A number of different products are mined within the District's boundaries, including phosphate, limestone, shell, and sand. For the purposes of the water supply planning process, thermoelectric power generation is separated out as an individual use category. While the Format and Guidelines (DEP et al., June 2009) identified 0.1 million gallons per day (mgd) as the mandatory reporting threshold for the I/C and M/D categories, the District examined and included all permitted or reported uses, regardless of the quantity in projecting demand. The decision to include all water

use permits (WUPs), regardless of size, resulted from a belief that projection accuracy would be improved by capturing all available water use data.

Background

The District is divided into four planning regions: Heartland, Northern, Southern, and Tampa Bay. The Heartland Planning Region includes Hardee, Highlands, and Polk counties; the Northern Planning Region includes Citrus, Hernando, Lake, Levy, Marion, and Sumter counties; the Southern Planning Region includes Charlotte, DeSoto, Manatee, and Sarasota counties; and the Tampa Bay Planning Region includes Hillsborough, Pasco, and Pinellas counties. For the 2015 RWSP, 2010 is the starting point, or baseline year, for the purpose of developing and reporting water demand projections. This is consistent with the methodology in the Format and Guidelines (DEP et al., June 2009). The data for the baseline year consist of reported and estimated usage for 2010, whereas data for the years 2015 through 2035 are projected demands (estimated needs).

Data Source

Baseline pumpage data comes from the Water Use Well Package Database (WUWPD) (SWFWMD, 2014). This database includes metered use for individual/general permits and estimated use for small general permits. These quantities are for consumptive use of groundwater and fresh surface water. Recirculated water is not considered consumptive use, nor is the use of circulated seawater, and they are not included in the baseline and projected demand. The WUWPD does not include the use of reclaimed water; therefore, reclaimed water is not included in the baseline or demand projections.

As of 2010, there were 620 withdrawals (304 unique permits) with I/C, PG, or M/D permitted uses. A number of the permits have more than one of these uses. As noted in multiple sections of this RWSP, demand projections for the SWFWMD portions of Polk and Lake counties are from Volume 2 of the Draft RWSP for the Central Florida Water Initiative (CFWI) (St. John's River Water Management District (SJRWMD), South Florida Water Management District (SFWMD), SWFWMD and DEP, 2015).

Methodology

In the past three RWSPs, baseline water use was generally projected using a 3.0 percent over five-year growth rate because surveys of permittees and other methods generally did not perform well. There were exceptions for some sectors in some years but in general, a 3.0 percent over five-year growth rate was applied. Also, the projected demands generally exceeded actual use upon subsequent review. The 3.0 percent growth rate could therefore be considered conservative.

In an attempt to allow spatial and temporal divergence in the projections, publicly available data was reviewed to identify drivers of water demand for these sectors. District staff conducted statistical tests on a number of variables (e.g. sector employment growth rates) to determine if there is a correlation between withdrawals in these sectors and any publicly available data. Statistical correlations between sector employment and water use were weak. It appears that water use in these sectors is being driven by case-specific business imperatives.

After consideration, it was decided that a general economic driver, such as a growth rate factor derived from the Gross Regional Product (GRP) (Woods and Poole Economics, 2013) would likely provide the best overall driver for activities like commercial, mining and power generation.

The GRP is the market value of all final goods and services produced within a region (e.g. state, county, Metropolitan Statistical Area (MSA), etc.). However, the calculated Woods and Poole Economics five-year growth rates produced projections that were significantly higher than, and out of line with, previous projections and actual data. It was noticed that the one-year calculated Woods and Poole Economics growth rates were generally in the 2.5 percent to 3.5 percent range, or very close to the 3.0 percent over five-year growth rate used in previous RWSPs, but had the added advantage of growth rates varying at the county level and across time. In the absence of other better data, it was decided to use the Woods and Poole Economics one-year growth rate as a proxy for the previously used 3.0 percent over five-year growth rate across the board. The growth factors used for all sectors by county and year are found in Table 1 in the attached Appendix.

Water use projections were developed for all sectors by multiplying water use data from the WUWPD by the growth factor based on the Woods and Poole Economics GRP forecasts by county. For example, Cemex Construction Material, LLC (WUP# 7871) in Charlotte County reported using 0.004 mgd in 2010. This is a permit for a cement or concrete batch plant. Using the Charlotte County GRP-based growth factors in Table 1, this permit's demand is projected to grow 2.77 percent from 2010 to 2015, and 2.62 percent from 2015 to 2020. Projected use for 2015 and 2020 were calculated as follows:

$$2015 \text{ projected use} = 4,000 \text{ times } 1.0277 = 4,111 \text{ gallons per day (0.004111 mgd)}$$

$$2020 \text{ projected use} = 4,111 \text{ times } 1.0262 = 4,219 \text{ gallons per day (0.004219 mgd)}$$

This methodology was used for all institutional, I/C, PG, and M/D permits with one exception. The District was asked by the Mosaic Company to review "Appendix F: Groundwater Impact Analysis for the Final AEIS on Phosphate Mining in the CFPD" (2013). The objective was to better reflect the movement of pumpage across counties as their mines and demands shifted locations during the RWSP period of analysis. Base year demand, as with all other use categories addressed in the technical memo, was 2010 pumpage. However, rather than change demands by the GRP growth factors at the county level, the percentage change in demand was determined for all the mines in each five-year period based on changes in projected withdrawal rates in Table 17 of Mosaic Appendix F.¹ The projected withdrawal rates in Mosaic Appendix F are essentially projected permitted withdrawal rates. Where there were two or more withdrawal scenarios for a given year, the average of the scenarios was used.

Once the total projected demand for each period was calculated (based on the 2010 pumpage and five-year percentage changes in total withdrawals), the projected total demand was allocated to each county in each five-year period based on the percentage of the total Mosaic Appendix F withdrawals located in that county for that year (e.g. 2015, 2020). The net result is that projected usage is lower in counties where mines are being phased down or closed, and increased in counties where mining production is scheduled to increase or commence in the future.

¹ This was done for the Mosaic mines in counties outside the CFWI. Lake and Polk county projections, as in the other use sectors, are from the CFWI RWSP as noted previously. Note that the projected Desoto mine withdrawals will not occur in Desoto County but will be supplied by existing withdrawal points in Polk County, so the Mosaic Appendix F projected Desoto withdrawals were not included in the calculation of total projected Mosaic mine withdrawals outside of the CFWI.

The water use sectors addressed in the technical memorandum are not significantly affected by drought. The projections provided are the same for average and drought conditions (DEP et al., June 2009).

Projections Summary

For power generation, Table 2 in the Appendix indicates that Districtwide demand will increase by 4.923 mgd from 18.064 in 2010 to 22.987 mgd in 2035, an increase of 27.25 percent. Of that increase, 4.550 mgd is expected to occur in the Heartland Planning Region, 0.308 mgd in the Northern Planning Region, 0.002 mgd in the Southern Planning Region and 0.063 mgd in the Tampa Bay Planning Region. County projection breakdowns and totals for each of the planning regions can be found in Tables 3 through 6 in the Appendix.

For the I/C and M/D sectors, Table 7 in the Appendix indicates that Districtwide demand will decrease by 0.074 mgd from 83.371 mgd in 2010 to 83.297 mgd in 2035, a decrease of 0.09 percent. In general, these sector demands are expected to increase in all counties other than those where Mosaic mining operations are expected to decline or be phased out (Hillsborough, Manatee and Polk). Demand in the Heartland Planning Region is expected to increase by 1.633 mgd between 2010 and 2035. Polk County dominates the Heartland I/C and M/D projections, and the CFWI RWSP projects a 1.380 mgd decline in I/C and M/D demands in Polk from 2010 to 2035. This decrease is more than offset by projected increases in Hardee County, where there are expected increases in mining activity. The Northern Planning Region has a projected demand increase of 1.537 mgd from 2010 to 2035. Demands in the Southern and Tampa Bay planning regions are projected to decline by 2.418 and 0.826 mgd, respectively. County I/C and M/D projection breakdowns and totals for each of the planning regions can be found in Tables 8 through 11 in the Appendix.

Review

The District has provided previous technical memoranda and previous demand projection tables to WUP staff and I/C, P/G, and M/D sector stakeholders for review and comment. Permitting staff and stakeholders may have a much more intimate understanding of the permits for which they are responsible. It was during the review by regulatory staff that questions related to entrainment quantities associated with some mining operations arose. Because mining operations generally continue whether the product being mined is saturated or relatively dry, it was decided that entrainment quantities, for the most part, were not necessary for the mining process to proceed and should therefore not be treated as a demand. Further refinements were made to M/D projections based on suggestions from Mosaic Company that the District review their future mining plans. These refinements are described in the "Methodology" section above.

Upon receiving any additional stakeholder comments, the District will review suggested changes and, if appropriate, include updates. As this is a long-term planning effort, it is important to note that methodology changes based on short-term trends are not taken into account. Comments and suggested changes will only be taken into consideration if they are justifiable, defensible, based on historical regression data and long-term trends, and/or supported by complete documentation. Earlier versions of these projections were presented to District staff and the Industrial Advisory Committee. The projections contained herein were provided to the District's Industrial Advisory Committee on August 11, 2015.

Appendix

The appendix includes all of the tables referenced above. In addition to the tables referenced, Table 12 breaks down the projected demands for all three sectors for selected years Districtwide.

References

DEP et al., June 2009. *Format and Guidelines for Regional Water Supply Plans*.

Mosaic Company, 2013. *Appendix F: Groundwater Impact Analysis for the Final AEIS on Phosphate Mining in the CFPD*.

SJRWMD, SFWMD, SWFWMD and DEP, 2015. *Draft CFWI Regional Water Supply Plan*.

SWFWMD, March 3, 2013. *Water Use Well Package Database*. \\ad.swfwmd.net\prj\Hydro Eval\Projects\P417 - Groundwater Modeling Support\Well_Packages\92_2011\Metadata

Water Plan Development Group, 2005. *Format and Guidelines for Regional Water Supply Plans*.

Woods and Poole Economics. Florida State Profile, 2013. *State and County Projections to 2040*. www.woodsandpoole.com/main.php?cat=country

APPENDIX TABLES

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Table 1. *General Five-Year Growth Percentages Applied to I/C, M/D and PG Demands*

County	2015	2020	2025	2030	2035
Charlotte	2.77%	2.62%	2.56%	2.50%	2.44%
Citrus	1.61%	2.74%	2.74%	2.75%	2.75%
Desoto	2.20%	1.93%	1.94%	1.95%	1.96%
Hardee	2.82%	2.27%	2.23%	2.19%	2.16%
Hernando	4.18%	3.00%	2.95%	2.91%	2.87%
Highlands	4.26%	3.06%	3.06%	3.05%	3.03%
Hillsborough	2.51%	2.70%	2.67%	2.63%	2.60%
Lake	N/A	N/A	N/A	N/A	N/A
Levy	1.74%	2.30%	2.27%	2.25%	2.23%
Manatee	2.42%	2.82%	2.80%	2.78%	2.76%
Marion	1.77%	2.09%	2.07%	2.05%	2.03%
Pasco	3.05%	3.26%	3.21%	3.17%	3.13%
Pinellas	2.25%	2.01%	1.95%	1.90%	1.85%
Polk	NA	NA	NA	NA	NA
Sarasota	2.16%	2.45%	2.41%	2.38%	2.35%
Sumter	4.94%	3.87%	3.86%	3.85%	3.83%

Note: Lake and Polk projections are from Draft CFWI RWSP Vol. 2 (May 2015)

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Table 2. Demand Projections by County for Power Generation (mgd)

County	2010	2015	2020	2025	2030	2035	Change	% Change
							2010-2035	2010-2035
Charlotte	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.00%
Citrus	2.327	2.365	2.429	2.496	2.565	2.635	0.308	13.24%
DeSoto	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.00%
Hardee	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.00%
Hernando	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.00%
Highlands	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.00%
Hillsborough	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.00%
Lake ¹	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.00%
Levy	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.00%
Manatee	0.013	0.013	0.014	0.014	0.014	0.015	0.002	14.33%
Marion	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.00%
Pasco	0.374	0.385	0.398	0.410	0.423	0.437	0.063	16.86%
Pinellas	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.00%
Polk ¹	15.350	15.950	16.810	17.750	18.800	19.900	4.550	29.64%
Sarasota	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.00%
Sumter	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.00%
District Total	18.064	18.713	19.651	20.671	21.803	22.987	4.923	27.25%

¹ Projections for the SWFWMD portion from Draft CFWI RWSP Vol. 2 (May 2015)

Note: Quantities do not include reclaimed or seawater sources.

Table 3. Heartland Planning Region Projected Power Generation Demand (5-in-10) (mgd)

County	2010	2015	2020	2025	2030	2035	Change	% Change
							2010-2035	2010-2035
Hardee	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.00%
Highlands	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.00%
Polk ¹	15.350	15.950	16.810	17.750	18.800	19.900	4.550	29.64%
Total	15.350	15.950	16.810	17.750	18.800	19.900	4.550	29.64%

¹ Projections for the SWFWMD portion from Draft CFWI RWSP Vol. 2 (May 2015)

Note: Quantities do not include reclaimed or seawater sources.

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Table 4. Northern Planning Region Projected Power Generation Demand (5-in-10) (mgd)

							Change	% Change
County	2010	2015	2020	2025	2030	2035	2010-2035	2010-2035
Citrus	2.327	2.365	2.429	2.496	2.565	2.635	0.308	13.24%
Hernando	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.00%
Lake ¹	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.00%
Levy	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.00%
Marion	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.00%
Sumter	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.00%
Total	2.327	2.365	2.429	2.496	2.565	2.635	0.308	13.24%

¹ Projections for the SWFWMD portion from Draft CFWI RWSP Vol. 2 (May 2015)

Note: Quantities do not include reclaimed or seawater sources.

Table 5. Southern Planning Region Projected Power Generation Demand (5-in-10) (mgd)

							Change	% Change
County	2010	2015	2020	2025	2030	2035	2010-2035	2010-2035
Charlotte	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.00%
DeSoto	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.00%
Manatee	0.013	0.013	0.014	0.014	0.014	0.015	0.002	14.33%
Sarasota	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.00%
Total	0.013	0.013	0.014	0.014	0.014	0.015	0.002	14.33%

Note: Quantities do not include reclaimed or seawater sources.

Table 6. Tampa Bay Planning Region Projected Power Generation Demand (5-in-10) (mgd)

							Change	% Change
County	2010	2015	2020	2025	2030	2035	2010-2035	2010-2035
Hillsborough	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.00%
Pasco	0.374	0.385	0.398	0.410	0.423	0.437	0.063	16.86%
Pinellas	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.00%
Total	0.374	0.385	0.398	0.410	0.423	0.437	0.063	16.86%

Note: Quantities do not include reclaimed or seawater sources.

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Table 7. Districtwide Demand Projections by County for I/C and M/D (5-in-10) (mgd)

County	2010	2015	2020	2025	2030	2035	Change	% Change
							2010-2035	2010-2035
Charlotte	0.061	0.062	0.064	0.066	0.067	0.069	0.008	13.57%
Citrus	0.752	0.764	0.785	0.807	0.829	0.852	0.100	13.24%
DeSoto	0.496	0.507	0.517	0.527	0.537	0.548	0.051	10.37%
Hardee	1.652	3.633	6.002	4.867	4.629	4.660	3.008	182.09%
Hernando	7.855	8.183	8.429	8.678	8.930	9.186	1.331	16.95%
Highlands	0.029	0.030	0.031	0.032	0.033	0.034	0.005	17.59%
Hillsborough	12.268	13.041	10.411	10.689	10.970	11.256	-1.012	-8.25%
Lake ¹	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.00%
Levy	0.066	0.068	0.069	0.071	0.072	0.074	0.007	11.27%
Manatee	3.568	1.220	1.073	1.075	1.077	1.079	-2.489	-69.76%
Marion	0.125	0.128	0.130	0.133	0.136	0.138	0.013	10.41%
Pasco	1.069	1.101	1.137	1.174	1.211	1.249	0.180	16.86%
Pinellas	0.060	0.062	0.063	0.064	0.065	0.066	0.006	10.36%
Polk ¹	54.890	48.190	49.070	50.490	51.950	53.510	-1.380	-2.51%
Sarasota	0.094	0.096	0.098	0.101	0.103	0.106	0.012	12.30%
Sumter	0.386	0.405	0.421	0.437	0.454	0.472	0.085	22.07%
District Total	83.371	77.491	78.300	79.209	81.063	83.297	-0.074	-0.09%

¹ Projections for the SWFWMD portion from Draft CFWI RWSP Vol. 2 (May 2015)

Note: Quantities do not include reclaimed or seawater sources.

Table 8. Heartland Planning Region Projected I/C and M/D Demand (5-in-10) (mgd)

County	2010	2015	2020	2025	2030	2035	Change	% Change
							2010-2035	2010-2035
Hardee	1.652	3.633	6.002	4.867	4.629	4.660	3.008	182.09%
Highlands	0.029	0.030	0.031	0.032	0.033	0.034	0.005	17.59%
Polk ¹	54.890	48.190	49.070	50.490	51.950	53.510	-1.380	-2.51%
Total	56.571	51.853	55.103	55.389	56.611	58.204	1.633	2.89%

¹ Projections for the SWFWMD portion from Draft CFWI RWSP Vol. 2 (May 2015)

Note: Quantities do not include reclaimed or seawater sources.

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Table 9. Northern Planning Region Projected IC and M/D Demand (5-in-10) (mgd)

County	2010	2015	2020	2025	2030	2035	Change	% Change
							2010-2035	2010-2035
Citrus	0.752	0.764	0.785	0.807	0.829	0.852	0.100	13.24%
Hernando	7.855	8.183	8.429	8.678	8.930	9.186	1.331	16.95%
Lake ¹	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.00%
Levy	0.066	0.068	0.069	0.071	0.072	0.074	0.007	11.27%
Marion	0.125	0.128	0.130	0.133	0.136	0.138	0.013	10.41%
Sumter	0.386	0.405	0.421	0.437	0.454	0.472	0.085	22.07%
Total	9.185	9.548	9.834	10.125	10.421	10.722	1.537	16.73%

¹ Projections for the SWFWMD portion from Draft CFWI RWSP Vol. 2 (May 2015)

Note: Quantities do not include reclaimed or seawater sources.

Table 10. Southern Planning Region Projected I/C and M/D Demand (5-in-10) (mgd)

County	2010	2015	2020	2025	2030	2035	Change	% Change
							2010-2035	2010-2035
Charlotte	0.061	0.062	0.064	0.066	0.067	0.069	0.008	13.57%
DeSoto	0.496	0.507	0.517	0.527	0.537	0.548	0.051	10.37%
Manatee	3.568	1.220	1.073	1.075	1.077	1.079	-2.489	-69.76%
Sarasota	0.094	0.096	0.098	0.101	0.103	0.106	0.012	12.30%
Total	4.219	1.886	1.753	1.768	1.785	1.801	-2.418	-57.31%

Note: Quantities do not include reclaimed or seawater sources.

Table 11. Tampa Bay Planning Region Projected I/C and M/D Demand (5-in-10) (mgd)

County	2010	2015	2020	2025	2030	2035	Change	% Change
							2010-2035	2010-2035
Hillsborough	12.268	13.041	10.411	10.689	10.970	11.256	-1.012	-8.25%
Pasco	1.069	1.101	1.137	1.174	1.211	1.249	0.180	16.86%
Pinellas	0.060	0.062	0.063	0.064	0.065	0.066	0.006	10.36%
Total	13.397	14.204	11.611	11.926	12.246	12.571	-0.826	-6.16%

Note: Quantities do not include reclaimed or seawater sources.

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Table 12. *Baseline Usage and Water Demand Projections in 16-County Area (mgd)*

Water Use by Use Category	2010 Baseline Usage	2015 Water Demand Projection	2035 Water Demand Projection	Difference 2010-2035
Industrial/Commercial	52.060	48.516	53.929	1.868
Mining/Dewatering	31.311	28.975	29.369	-1.942
Power Generation	18.064	81.713	22.987	4.923

Notes: 2010 Baseline usage (mgd) is aggregate data from the Water Use Well Package database, March 3, 2013.

Source file: SWFMETA92_11.CSV

1. Polk County demand projections from Volume 2 of the Draft Regional Water Supply Plan for the Central Florida Water Initiative <http://cfwiwater.com/planning.html> (May 2015) were broken down using the percentage of non-power generation water use in the 2010 baseline. According to our calculations, 61% of the IC/MD use falls in the IC category.
2. This total includes projections for Polk County from Volume 2 of the Draft Regional Water Supply Plan for the Central Florida Water Initiative <http://cfwiwater.com/planning.html> (May 2015).
3. Quantities do not include reclaimed or seawater sources.