

COMPREHENSIVE

Economic Development Strategy (CEDS)

2023 Supplemental
Update

Economic
Development
District serving
**DeSoto • Hardee • Highlands
Okeechobee • Polk**

COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY

2023

CENTRAL FLORIDA ECONOMIC DEVELOPMENT DISTRICT SERVING
DESOTO, HARDEE, HIGHLANDS, OKEECHOBEE, AND POLK COUNTIES



**United States Department of Commerce
Economic Development Administration**

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This document has been prepared with financial assistance from the U.S. Economic Development Administration.

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For more information on the contents of the Comprehensive Economic Development Strategy, please view the CEDS Data Document at www.cfrpc.org/CEDS/

Guide economic growth

Introduction

The Comprehensive Economic Development Strategy (CEDS) is a federally required document that serves as a regional blueprint for creating a stronger, more diverse economy. It is a strategy-driven plan for economic development designed to build capacity, set priorities for investment, and guide economic prosperity and resiliency throughout the region. The CEDS is an ongoing planning process that requires participation and input from both the public and private sectors, along with the communities of a region.

The development of the CEDS is facilitated by the Central Florida Regional Planning Council (CFRPC). The CFRPC is designated by the U.S. Economic Development Administration (EDA) of the U.S. Department of Commerce as the Economic Development District (EDD) for the Central Florida Region and works on behalf of DeSoto, Hardee, Highlands, Okeechobee, and Polk counties. The CEDS is designed to guide economic growth by fostering a more stable and diversified economy, to assist in the creation of jobs, and thereby improve the quality of life within the 5-county region. Additionally, the CEDS serves as a vehicle to justify and draw down federal funds and the mechanism through which EDA evaluates grant requests.

Assist in the creation of jobs

CEDS Advisory Committee

The development of the CEDS is guided by the Advisory Committee which frames the discussion, develops goals and objectives, and recommends actions to implement the regional strategy. The Committee is comprised of representatives of both the public and private sectors. Members represent the economic interests of the region and include elected officials, economic development professionals, workforce development boards, educational institutions, agricultural based organizations and Farm Bureaus, and other business industry professionals. Committee members play an integral role in providing insight on issues that influence the economic landscape of the region.

Aubrey Brown	CSX	Morgan Odum	Mosaic	Rex Jackson	LEGOLAND
Drew Wilcox	Nucor Steel	Marc Hoenstine	Duke Energy	John Helms	Bartow Executive Airport
Nicole Walker	UF/IFAS Extension	Stacy Campbell-Domineck	CareerSource Polk	Larry Black	Peace River Packing
Donna Doubleday	CareerSource Heartland	Mike Willingham	Sebring Airport Authority	Gene Conrad	SUN'n'Fun Aerospace Expo
Jake Fojtik	Florida Farm Bureau Federation	Kris Hallstrand	Lakeland Linder International Airport	Paulette Wise	Okeechobee Chamber of Commerce
Sean Malott	Central Florida Development Council	Cyndi Jantomaso	Haines City Economic Development Council	Sandra Guffey	DeSoto County Economic Development
Bruce Lyon	Winter Haven Economic Development Council	Denise Grimsley	The Development Group	Jeff King	Highlands County Economic Development Council
Terry Burroughs	Florida's Heartland Economic Region of Opportunity	Kaylee King	Okeechobee County Economic Development Corporation	Brent Ferns	South Florida State College (Farmworker Career Development)



BACKGROUND AND KEY REGIONAL ISSUES

The Comprehensive Economic Development Strategy (CEDS) analyzes the regional economy and creates a road map to economic diversity through private sector investment and job creation. The CEDS is developed in alignment with regional and state principles, primarily guided by:

- > **Heartland 2060: Building a Resilient Region** (www.heartland2060.org), which is the Heartland region's long term vision plan for economic diversity and resiliency.
- > **The Florida Chamber's Six Pillars** (www.flchamber.com/six-pillars/), which strategically plans for Florida's future.
- > **The Florida Chamber's Florida 2030 Project** (www.flchamber.com/florida-2030/), which is designing a blueprint for Florida's future through engagement with business and community leaders in each county.
- > **Florida's Strategic Plan For Development**, the State of Florida's first statewide vision for economic development.

Some of the economic development issues in the region include:

- > The need to diversify the region's economy for long term stability and prosperity;
- > The need to build a skilled workforce and increase average wages;
- > The need for greater infrastructure planning and capital commitment; and
- > The need for sufficient resources, particularly for rural economic development.

What gives you the most concern about the future of this region?





The states' rural and remote areas are vulnerable to the effects of weather and climate disasters, and are slower to recover from related impacts. During the initial outbreak of COVID 19, nine of the ten major industries in Florida experienced negative job growth and employment declined by a record amount reaching 14.1 percent at the state level (May 2020) and 14.7 percent nationally (April 2020) exceeding the highs experienced during the Great Recession. Downtowns, neighborhood commercial corridors, and the leisure and hospitality sector suffered tremendous losses as health regulations affected the presence of both workers and patrons. The state has since experienced job growth and labor force increases

9 of 10 industries experienced Positive over-the-year job growth as of August 2023	
Education & Health Services +85,500 jobs, +6.3 percent	Leisure & Hospitality +43,800 jobs, +3.5 percent
Trade, Transportation, & Utilities +53,900 jobs, +2.8 percent	Professional & Business Services +22,000 jobs, +1.4 percent
Total Government +25,700 jobs, +2.4 percent	Financial Activities +13,700 jobs, +2.0 percent
Manufacturing +13,100 jobs, +3.2 percent	Other Services +5,600 jobs, +1.6 percent
Construction +4,500 jobs, +0.7 percent	Information -400 jobs, -0.3 percent
Source: U.S. Department of Labor, Bureau of Labor Statistics, Current Employment Statistics Program. Prepared by: Florida Department of Commerce, Bureau of Workforce Statistics and Economic Research.	

with 9 of Florida's ten major industries experiencing continued positive over-the-year job growth, as of August 2023. As the region began to emerge from pandemic related impacts two hurricanes struck the State of Florida, resulting in the destruction of homes, infrastructure, and agricultural lands costing the state more than \$100 billion .

On September 23, 2022, Governor DeSantis declared a state of emergency and requested an expedited major disaster declaration on September 28, 2022. Hurricane Ian made landfall in southwest Florida as a Category 4 storm on September 28, 2022 causing heavy rain and flooding resulting in damage and property loss across Florida, and the long-term displacement of residents . Hurricane Ian was especially devastating to the region, with all seven counties in the Heartland Region being listed as disaster areas. Hurricane Ian and Subtropical Storm Nicole, which strengthened into a Category 1 Hurricane crossed the Region within months of one another resulting in unprecedented flooding and decreased resiliency due to shortened recovery time between hurricanes.

The Peace River is the largest contributing watershed to Charlotte Harbor, is a priority waterbody, and regionally significant. According to US Geological Survey data, Peace River flooding reached:

27.24 ft	Zolfo springs	(September 30th 2022)
63.54 ft	Near Wauchula	(September 29th 2022)
64.54 ft	Bowling Green:	(September 29th 2022)

What followed was an interruption of business operations, storm surge and flooding, damaged infrastructure, and substantial agricultural losses resulting in citrus damages ranging from \$146-\$304,262,703 .

The increasingly active hurricane seasons have resulted in the damage and deterioration of our downtowns. A number of community Main Streets and Community Redevelopment Areas within the region experienced extreme flooding and damage to historic buildings and structures of historical significance resulting in areas that were completely underwater. With high winds, flooding, and the interruption of critical infrastructure systems natural disasters continue to have devastating impacts on the state and local economy. In the months following Hurricane Ian, disaster recovery and resilience needs persist for Florida's rural and remote areas.

The central Florida region faces immediate challenges to its economic health due to the impacts of Hurricane Ian and past disasters. A significant industry and economic contributor in the region is citrus which has been undergoing a decline in crop and acreage over time due to labor shortages and citrus related pests, diseases, freezing events, other natural disasters which have severely reduced production. Notably, the Hunt Bros. citrus packinghouse located in the City of Lake Wales closed (2022) after 96 years of operation due to ongoing citrus greening and the impacts of Hurricanes Irma, Ian and Nicole, which destroyed crops and damaged a number of trees.

Nearly 7.3 million acres in Florida are now croplands, livestock, aquaculture and other agricultural uses, reflecting the major role agriculture plays in the state's economy . Citrus production in Florida peaked in 1997-98, with a record yield of 304 million boxes and has since fallen steadily to 41 million boxes in the 2021-22 season, an 85 percent decline and its lowest level since 1938 . Even as citrus continues to decline in the state of Florida, the Heartland Region accounts for 70 percent of the state's total citrus production. The top five citrus-producing counties in Florida from 2021-2022 were Polk (7.78 million boxes), DeSoto (6.8 million boxes), Highlands (6.65 million boxes), Hendry (5.52 million boxes) and Hardee (4.75 million boxes).

The region continues to face challenges to its economic health and there is a need to identify and promote assets to support future economic growth and development.

Given disparities in employment, income, education, mobility, and housing, the Heartland Region continues to be vulnerable to the effects of disasters. When disruptions in industry occur the production and financial viability of related sectors are heavily impacted. Climate and weather greatly impact the tourism and hospitality industry and are important factors in tourists' motivation to travel. These most recent weather events and variability in climate may have an impact on tourism demand within the state and region over time. Strategies for mitigation and adaptation should be considered as extreme weather events and climate change continue to impact the region.

Diversifying the economy with traditional and emerging industries, adopting disaster recovery and resiliency plans, and ensuring a continuously trained workforce, are all crucial to stimulating economic growth and job creation. The Central Florida Regional Planning Council continues to evaluate the ongoing economic impacts of disasters within our region and focus efforts on resiliency planning.

1) NOAA National Centers for Environmental Information (NCEI) U.S. Billion-Dollar Weather and Climate Disasters (2023). <https://www.ncei.noaa.gov/access/billions/>, DOI: 10.25921/stkw-7w73

2) Hurricane Ian's Preliminary Estimates of Damage to Florida Agriculture (October 2022)

3) Florida's Rising Seas: Mapping Our Future (Sea level 2040)

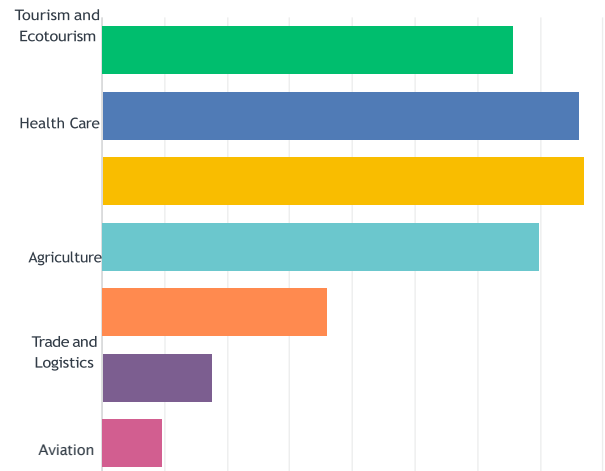
4) Federal Reserve Bank of Atlanta "Florida's Citrus Industry Faces an Uncertain Future" (May 25, 2023)

5) U.S. Department of Agriculture National Agricultural Statistics Service (September 7, 2022)

Assisting communities in responding to and recovering from disaster related impacts is a regional priority to be accomplished through the following efforts:

- > Performing analyses to quantify economic injury;
- > Providing technical assistance in developing continuity and resiliency plans, and building capacity;
- > Identifying resources and grant eligible projects to assist communities with long and short term needs.

Which industries will help ensure a resilient and adaptable economy for your community?



Poverty Status in the Heartland Region

Utilizing the EDA-Census Poverty Status Viewer tool, census tracts within the Heartland Region were highlighted, identifying areas with a poverty rate of 20 percent or more. In an effort to grow the regional economy, developing a skilled work force for future economic growth and advancing equitable approaches to economic development that connect workers to high skilled high wage employment opportunities will be key in strengthening concentrated poverty areas within the region with limited economic mobility.

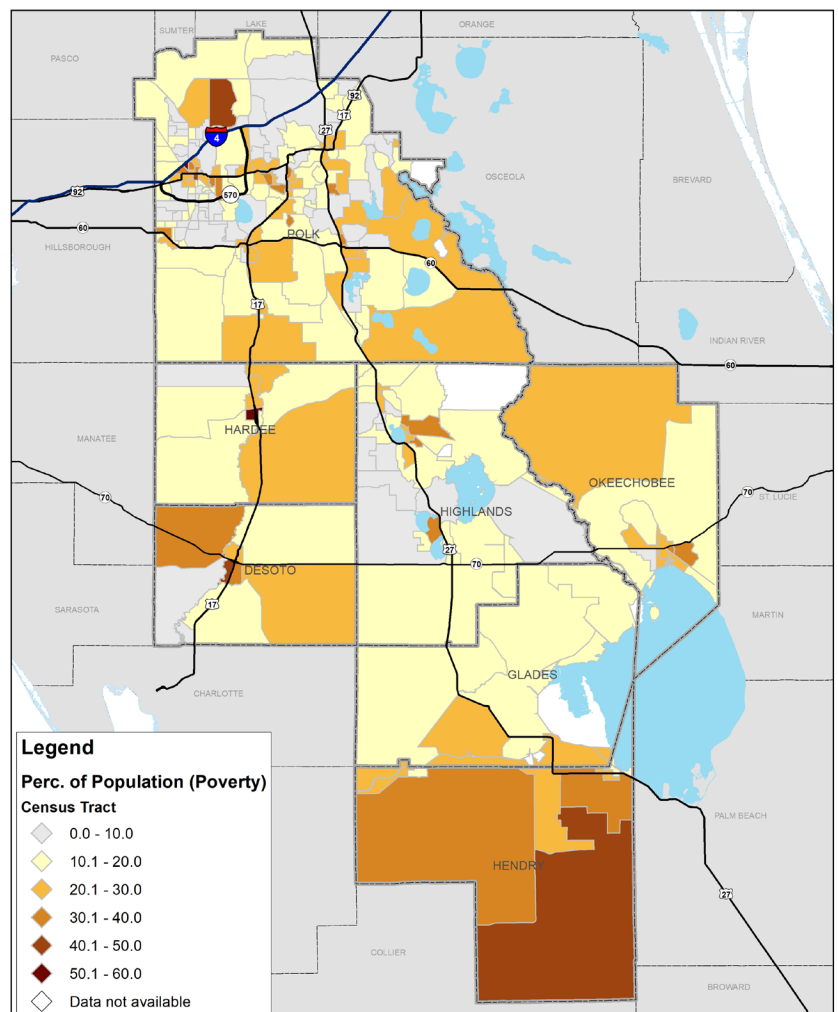
Current Vintage: 2017-2021

ACS Table(s): B17020, C17002

Data downloaded from: Census Bureau's API for American Community Survey

Date of API call: December 8, 2022

National Figures: data.census.gov



BACKGROUND AND KEY REGIONAL ISSUES

Population

Located geographically in the center of the Florida peninsula, the Central Florida Region serves as an attractive place to locate due to its relatively inexpensive land and housing prices in comparison to the coastal metropolitan areas of the state. The region is surrounded by fast-growing areas on the east and west coasts of Florida and the Orlando metro area to the northeast and includes vast areas of agricultural and vacant land. As the coastal areas of the state become saturated with population, the cost of developing and residing along the coasts continue to rise, and sea level rise continues to impact the state the Central Florida region has become more attractive.

The estimated total 2022 population for the 5-county region is 972,798 with Polk County representing the most populated county with 770,019 residents, followed by Highlands County with 103,102 residents. Polk County is expected to remain the most populous county and the center of the region's job market. The increase in population is likely to stimulate economic activity through the expansion of labor supply, making the region attractive to business and industry.

The region's population continues to grow, primarily due to in-migration, and with a growing population there may be an opportunity to expand the labor supply and bring new talent into the region. Additionally, the growing diversity of the population

POPULATION INCREASE



+ 52,366

Net Migration (2020-2022)

Source: Florida Department of Health (2020-2021 Vital Statistics), US Census Bureau (2020 Census), and University of Florida, Bureau of Economic and Business Research (2021 Estimates).

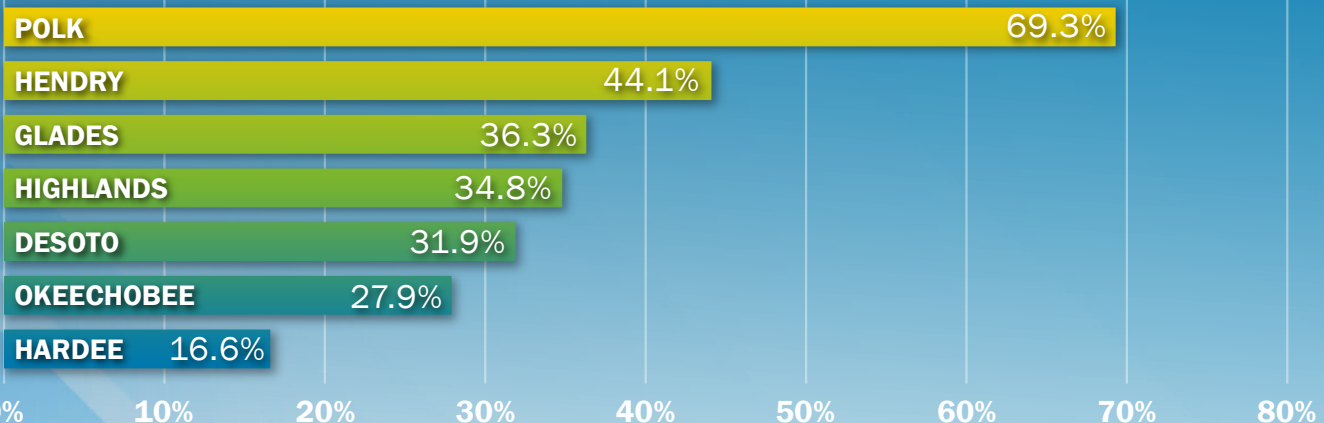
972,298

2022 Estimated
Region Population

Source: Bureau of Economic and Business Research; 2010 and 2020 for US Census Bureau

adds potential to the bilingual workforce. The region, however, has a significant aging population resulting in a workforce that is aging out of the job market. Additionally, cost of living pressures impact the regions ability to retain and attract talent creating a shortage of skilled labor.

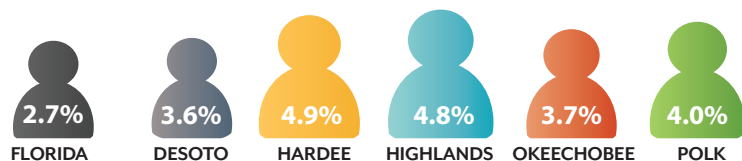
POPULATION GROWTH will be strongest in Polk County (percent change, 2018-2060)



(Source: U.S. Census Bureau, American Community Survey)

Employment

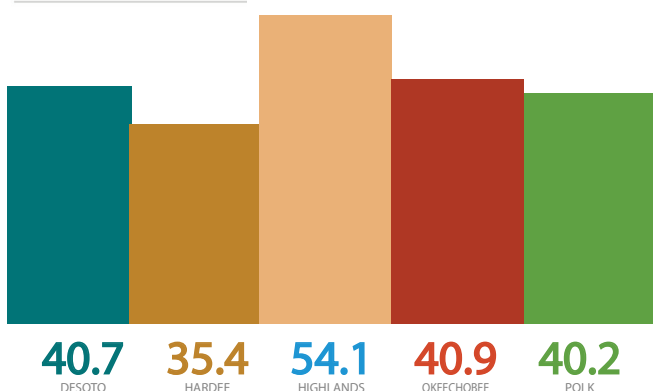
UNEMPLOYMENT



The region's economy has adapted to change in the past, having shown its ability to expand the service sector while moving away from the declining natural resources industry. However, employment in the region's traditional industries has in some cases continued to decline, and overall unemployment continues to be higher than the State average. The region should prepare to offer a workforce that has the skills necessary to adapt to rapidly growing or new employment sectors, as diversification of the economy and industries continues.

Source: FloridaCommerce, Bureau of Workforce Statistics and Economic Research, Local Area Unemployment Statistics (LAUS) (June 2023 Release).

MEDIAN AGE

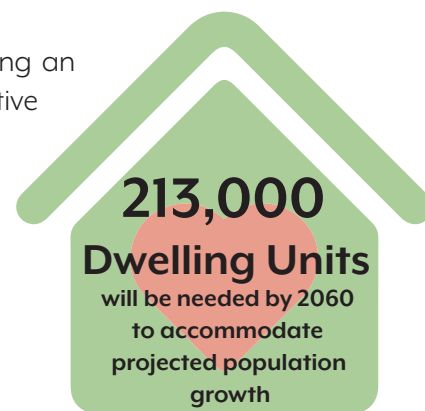


Source: 2017-2021 American Community Survey 5-Year Estimates Table S0101

Housing

Maintaining a diverse supply of housing is critical to attracting and maintaining an adequate labor force. Rising demand and limited supply has created a competitive housing market with significant housing costs. With constraints in the supply and location of affordable housing, families are limited in their ability to acquire housing in close proximity to employment centers-increasing commute distances and household costs, and reducing employment opportunities and economic outcomes.

Median housing values continue to be below state values despite increases overtime. Home ownership rates continue to be above state and national rates, even as home prices surge and housing becomes less affordable in the region. Additionally, a shortage of rental housing in some areas of the region is of particular concern along with the number of mobile homes, which are vulnerable to extreme weather events. The addition of new homes to alleviate price increases would help to ensure supply is added at prices affordable to a range of incomes and support economic competitiveness.



Source: 2016-2020 American Community Survey 5-Year Estimates, DP04

MEDIAN HOME VALUE



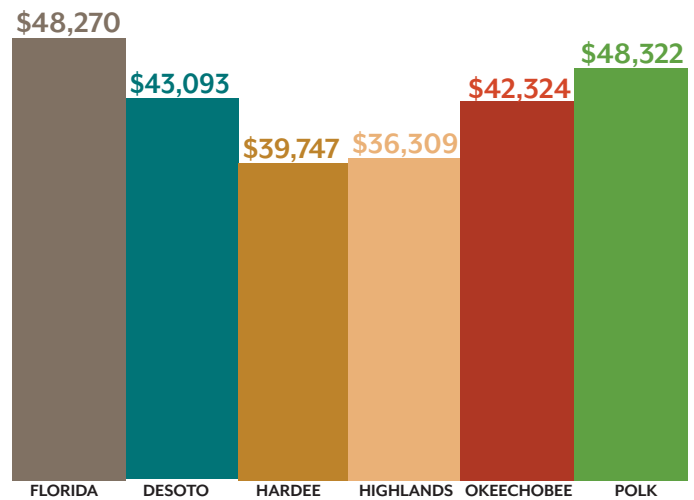
Source: American Community Survey (2016-2020)

Wages and Income

Per capita income is defined as the average income earned per resident in a community and is determined by dividing the community's total income by total population. Thus, the higher the per capita income, the higher the buying power of the average resident. Wages and per capita income in the region continue to lag behind state and national averages suggesting stagnant household incomes, underemployment and poverty, and distress throughout the region.

In order to increase the availability of high skill high wage jobs, the economy must be diversified. The industry structure of the region reflects that of a service-based economy with the greatest number of jobs represented in service-providing industries. While rapid growth in Education and Health Services, Leisure and Hospitality, and Other Services present an opportunity to attract employment, quality of life improvements, and the positive expansion of the regional economy, the wage rate in these industries reflect the least paid end of the labor market. This segment of the population is often transit dependent, with income insufficient to qualify for a home loan valued at the median home price and not be cost burdened.

AVERAGE ANNUAL WAGES



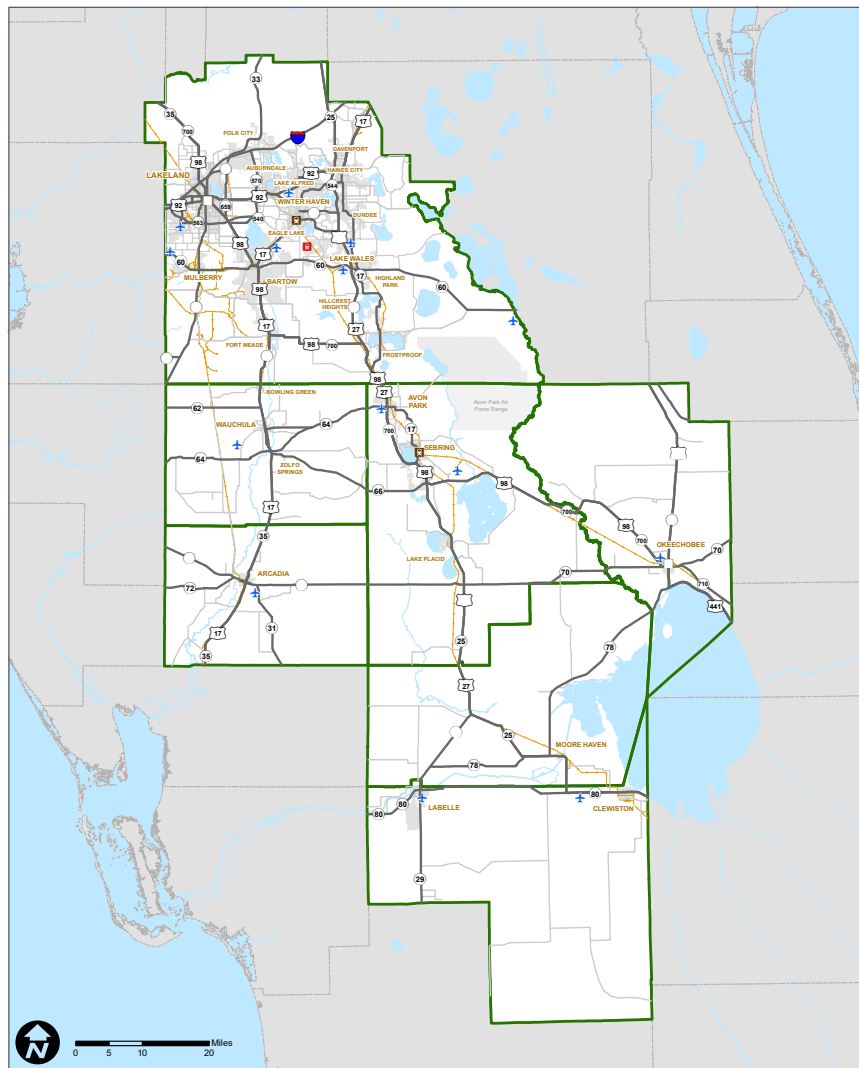
Source: FloridaCommerce, Bureau of Workforce Statistics and Economic Research, Quarterly Census of Employment and Wages Program (QCEW).

PER CAPITA INCOME



Source: Bureau of Economic Analysis (2021)

Heartland Regional Roadway Network



Legend

- County Boundaries
- + Airports (Public)
- Regionally Significant Roadways
- Amtrak Stations
- Other Roadways
- Intermodal Facility

Heartland transportation infrastructure includes:

- 12 General aviation airports
- 4 Amtrak stations
- 1,628 miles of state & US highways
- 490 miles of railroad track

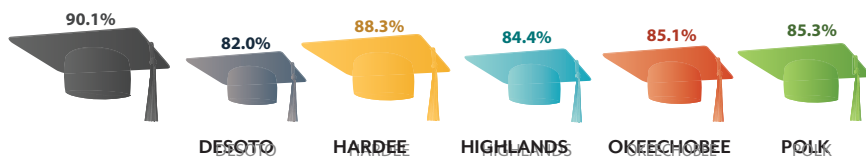
The region's central location within the Florida peninsula gives it high potential to continue to grow as an intermodal transportation hub. Coordinating transportation planning with land use planning can improve local economies as well as quality of life. The region contains corridors of statewide importance and an extensive freight rail network. However, some parts of the roadway network do not meet current transportation needs, which can decrease the attractiveness of sites for economic development.

Workforce Development

The Central Florida region shares workforce development issues with most other rural areas—challenges attracting new opportunities and talent. The region is characterized by graduation rates that have fluctuated over time and high out-migration of students and workers to urban and scholastic centers. Technology and knowledge-based industries, are often challenged to find well-trained administrative, management, and even entry-level employees skilled enough to fill the jobs they create. The need for a highly skilled workforce to support these industries is a critical decision point for future workforce development, and business location and expansion decisions.

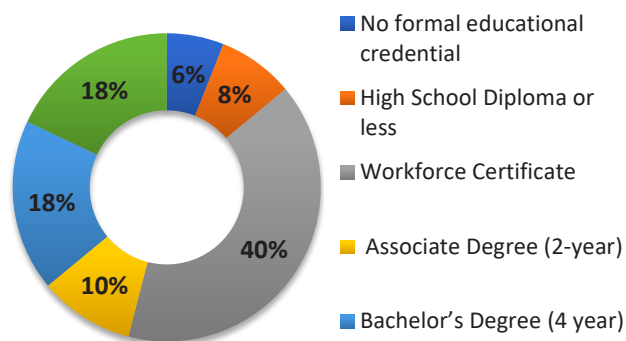
The post pandemic economy has opened the doors to remote work opportunities allowing for new career paths, broader talent pools and greater opportunity underscoring the need for infrastructure to support the digital workforce. A major step forward for workforce readiness has been the inclusion of relevant training in K-12 and community college curricula providing technical training in fields that do not require degrees. This allows for ready access to skilled labor to support growing sectors and emerging industries.

HIGH SCHOOL GRADUATION RATE



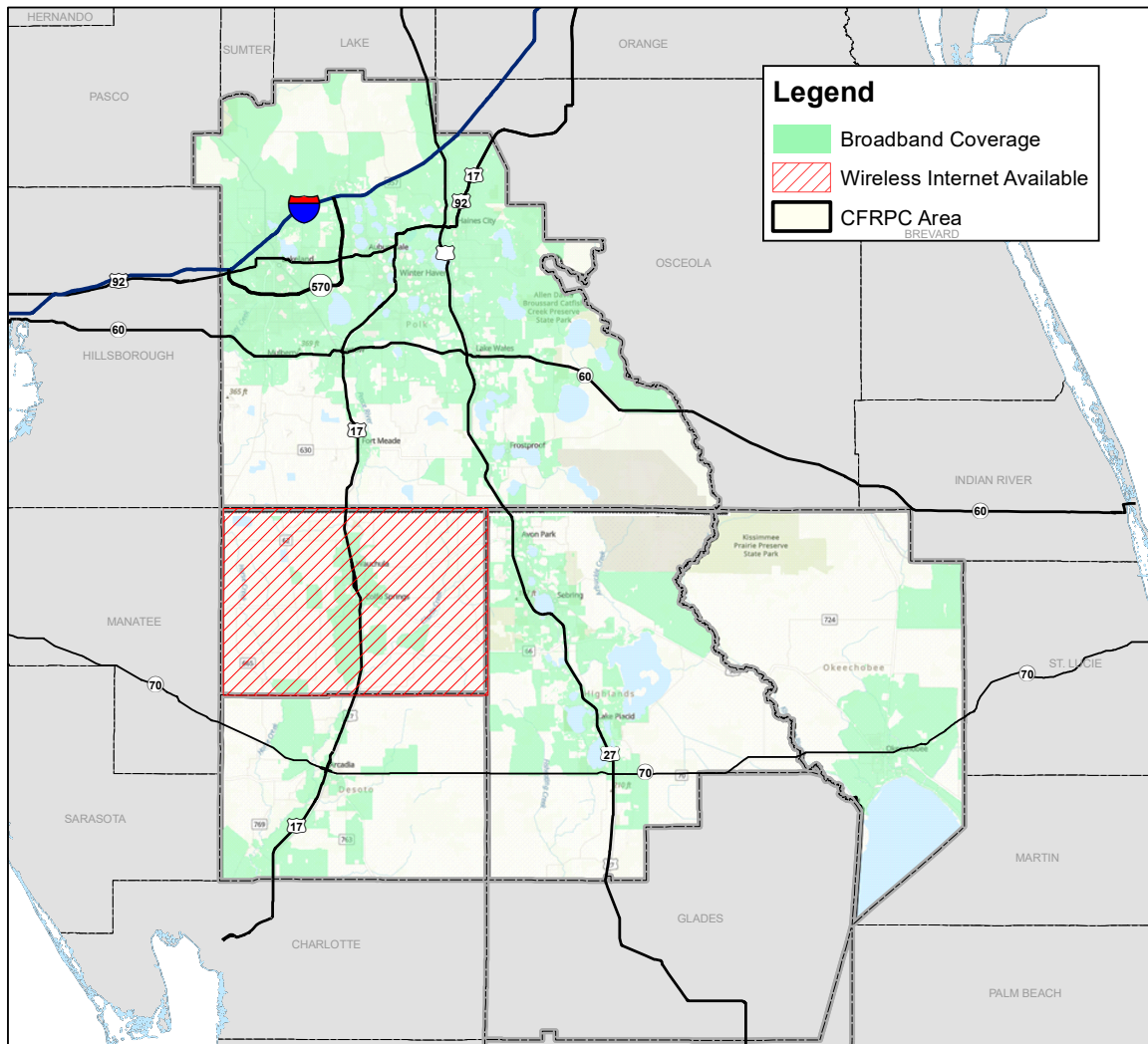
Source: TheFloridaScorecard.org, Florida Chamber Foundation

Level of Education Required for Florida's 50 Fastest-Growing Occupations



Source: FloridaCommerce, Bureau of Workforce Statistics and Economic Research, Occupation and Industry Employment Projection 2022-2030

Nearly 90%
of Florida's fastest growing occupations require either a certificate, associate degree or bachelor's degree and above. Many of these careers are in healthcare, information technology and business.



Source: Florida Department of Economic Opportunity, Office of Broadband & Central Florida Regional Planning Council

Regional Barriers to Internet Access

Reasons may total >100%	Too Expensive	Not Available	No Computer
Desoto	40%	50%	20%
Hardee	66.7%	100%	33.33%
Highlands	18.75%	90.63%	3.13%
Okeechobee	26.67%	86.67%	6.67%
Polk	25%	81.25%	6.25%

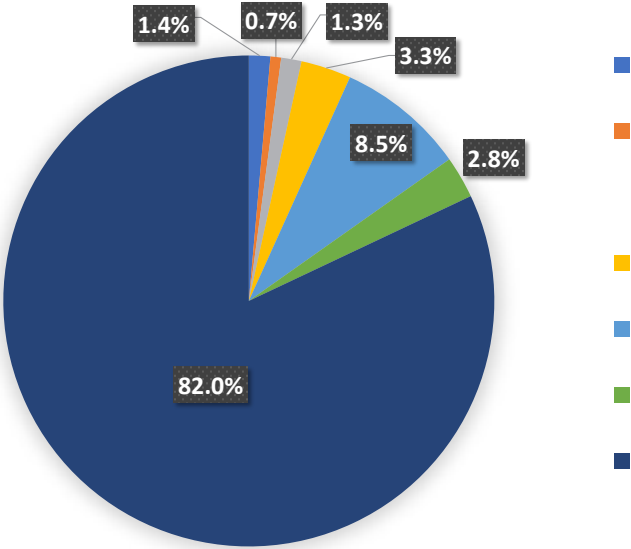
Source: FloridaCommerce, Office of Broadband (8/2023)

The region’s infrastructure would require updating and expanding, in order to foster business attraction and support certain economic development activities. Incremental development of land allows local governments to plan appropriately for land use, utilities, and transportation infrastructure to meet the needs of future economic and population growth. Opportunities for site development and emerging technologies may be delayed however, due to issues pertaining to inadequate electric, gas, water, wastewater, or telecommunications infrastructure. Additionally, some utility systems throughout the region are underfunded and underdeveloped. Investing in new infrastructure and maintaining existing infrastructure is critical to the region remaining competitive.

Broadband has become an essential quality-of-life amenity and serves as critical infrastructure for attracting new capital investment. COVID-19 highlighted significant disparities in internet access, affordability, reliability, and speed particularly in rural areas, impacting the recovery and resiliency efforts of communities within the region. Many workplaces made the decision to switch to remote work to prevent exposure and transmission, in response to the pandemic. At the same time, school closures were implemented shifting classes and assignments online to reduce exposure to the virus. The surge in telework, virtual learning, and other digital uses resulted in inadequate internet access impacting both the quality and speed of content. Broadband continues to be unavailable in many parts of the region resulting in numbers of unserved homes and businesses which may result in constrained economic growth and social progress.

Broadband and internet connectivity have been identified as a **vital component** of economic resiliency. **Broadband access is necessary** for continuity of operations for businesses, procuring goods and services, and for remote learning.

Water Resources

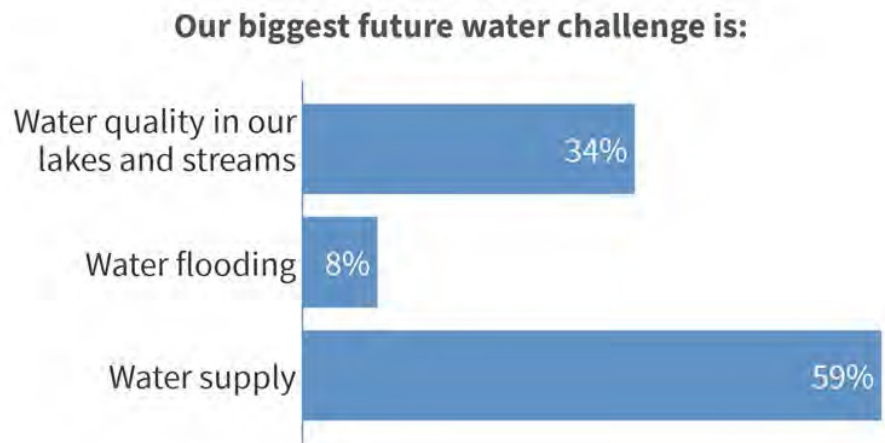


Source: Heartland 2060 Building a Resilient Region Revised

The Heartland Region is the point of origin for significant natural resource systems influencing much of peninsular Florida. The Green Swamp is the potentiometric high for the principal groundwater resource of the peninsula, the Floridan Aquifer, which supplies drinking water to nearly 10 million people. The Green Swamp provides headwater features for four river systems in the jurisdiction of three water management districts. Two of these river systems provide critical freshwater inputs to federally designated National Estuary Programs. The Kissimmee River is the principal freshwater source for Lake Okeechobee and the Everglades. The Lake Wales Ridge contains the remnants of a globally unique endangered habitat. The Peace River Basin spans 105 miles and totals 1,494,057 acres from the Green Swamp to Charlotte Harbor

.The Heartland plays a pivotal role in the health of ecosystems throughout much of peninsular Florida. Lakes are located throughout the region and provide an important habitat for fish and wildlife.

Water resources, both for economic development and general development use, will be a major challenge facing both the state and this region in the coming decades. Conserving water, developing alternative sources, and reusing water resources will be important elements in the economic development of the region. Wildfire hazard and fire management are also key elements in natural resources planning in the region, as wildfires occur every year, and are more prevalent during droughts. Preservation and restoration of natural habitats and ecosystems and programing water quality will give rise to increased opportunities for ecotourism. As the coastal areas of the state become saturated with population, and the cost of developing and residing along the coasts continues to rise, the Central Florida region may become more attractive for population and economic development. The region's resources provide a natural location for the next wave of growth but require water supply planning and conservation measures to ensure water will be available to meet growth.

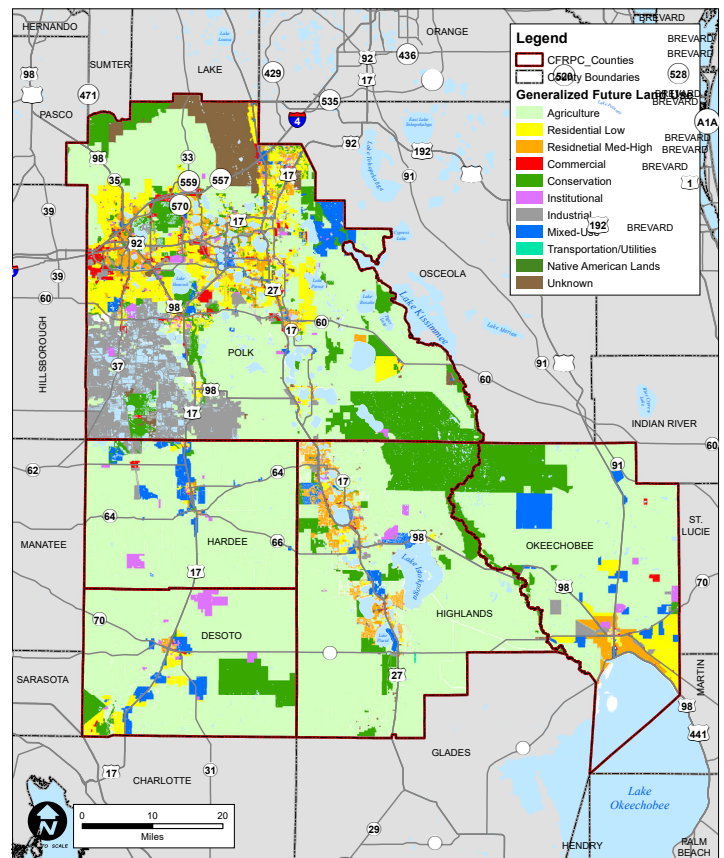


⁶ www.chnep.org/hurricane-ian

Source: Heartland 2060 Building a Resilient Region Revisited

Land Use

Diversification of the regional economy is dependent upon suitable land use for a variety of industries, businesses, and agricultural support facilities as well as institutional, governmental, and residential-support uses. To ensure this is not a hurdle, a variety of future land use categories are appropriate. A local government comprehensive plan that supports future land uses and infrastructure to support those land uses while avoiding unnecessary encroachment upon natural systems will provide opportunities for economic prosperity. The 30 local governments in the EDD all maintain Comprehensive Plans addressing land use.



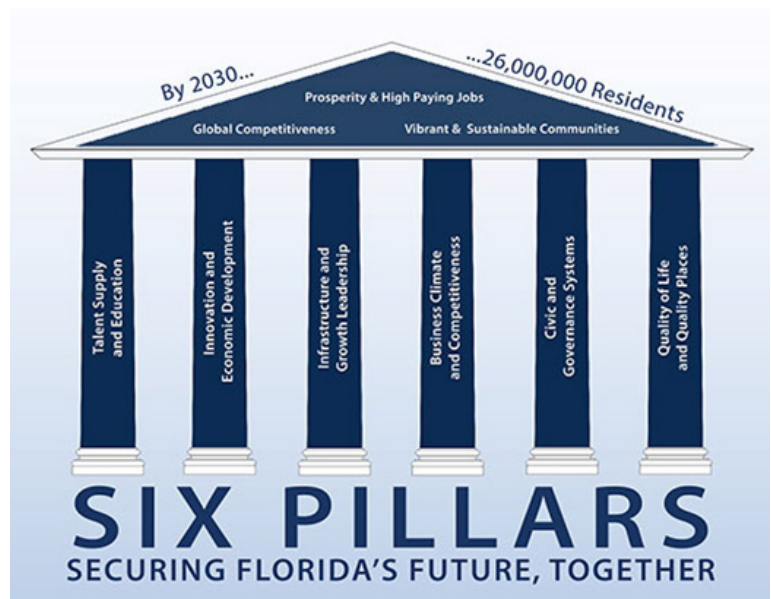
Source: University of Florida GeoPlan Center

GOALS & OBJECTIVES

The goals and objectives of the CEDS were developed by using the foundations of Heartland 2060: Building a Resilient Region, the Florida Strategic Plan for Economic Development, the Florida Chamber's Florida 2030, and the Six Pillars of Florida's Future Economy. These documents establish a clear vision for Florida's private and public sectors, and for Central Florida's Heartland Region to guide a strong future economy. As the region seeks economic diversification, it seeks to ensure preservation of our unique values, a mix of urban and rural lifestyles, and good stewardship of our natural resources while supporting growth and development in our communities.

The goals and objectives were sorted into categories, to provide consistency with the Six Pillars. The performance measures which can be found in the Data Document at cfrpc.org/CEDS are used to measure the success of the goals and objectives also sorted by the Six Pillars. Those pillars are:

- > **Talent Supply and Education** – The foundation for growth and success is a talented workforce
- > **Infrastructure and Growth Leadership** – Infrastructure preparedness for long term growth
- > **Innovation and Economic Development** – Creation of an environment for innovators to thrive
- > **Business Climate and Competitiveness** – Provide resources for businesses to start and grow
- > **Civic and Governance Systems** – Cultivating leaders, engaging youth, promote participation in civic affairs
- > **Quality of Life and Quality Places** – Encourage and create opportunities for prosperity



GOALS AND OBJECTIVES

Talent Supply & Education

Provide sufficient funding and encourage flexibility to allow regional stakeholders to address local needs in education, training and workforce development.

- > Adequate funding shall be available to provide education and training.
- > Attract and develop a sufficiently skilled workforce to meet future employment demands.

Ensure educational systems and workforce training to support innovation and creativity.

- > Review policies and rules to identify barriers to innovation and creativity in schools.
- > Become a leader in providing resources to support workforce training and skill development programs.

Infrastructure & Growth Leadership

Develop transportation systems to support a prosperous, globally competitive economy while minimizing impacts to the natural environment.

- > Establish hubs for global, national, and state distribution through development and implementation of a multimodal, interconnected transportation system in the region.
- > Ensure that growth and infrastructure are planned with natural resources protection.
- > Support and promote the growing Aviation-Centric Employment Centers.

Develop a strong export economy.

- > Complete a logistics study for filling empty containers to increase exports.
- > Develop a distribution network of hubs that connect to global markets and complement existing networks.

Maintain regional economic resilience strategies to mitigate adverse impacts to local economy as the result of housing and infrastructure loss (including broadband) due to a significant storm event, and assist local governments with economic resilience strategies.

Innovation & Economic Development

Provide funding for ongoing economic development activities.

- > Establish funding mechanisms for ongoing economic development activities.

Provide technical assistance and use new technology to promote job growth.

- > Develop technical assistance programs to support new technology.

Build seamless information technology infrastructure.

- > Develop projects that support information technology infrastructure.

Support location of medical life science facilities consistent with the Catalyst Project.

- > Expand the number of key educational resources and medical support staff to build support for a global medical treatment center.

Encourage alternative energy and green product industries.

- > Use clean energy to drive economic development and increase energy related employment.
- > Export power produced by renewable energy in the region to the state's coastal grids.

Diversify the economy with traditional and emerging industries.

- > Promote economic resilience through business retention and expansion programs of both traditional and emerging industries.



Business Climate & Competitiveness

Encourage local governments to adopt streamlined development approval procedures to support competitiveness through resilience.

- > Identify current development approval procedures in local governments that may be streamlined.
- > Adopt land development regulations which provide for temporary accommodations and flexible regulations to ensure businesses return to operation quickly after natural and man-made disasters.

Create a regional data collection repository by industry and county.

- > Monitor CEDS Performance Measures.

Develop projects and programs that support existing and new business.

- > Develop vertical and horizontal integration of key industries, including expanding manufacturing and research in the region.

Increase investment in business development and placement in the region.

- > Support outreach promoting the region's target industries including Agriculture.

Civic & Governance Systems

Improve coordination of economic development, land use, infrastructure, water and natural resource decision making.

- > Coordinate local government comprehensive planning and regional strategic planning with capital improvement projects to further regional goals.
- > Collaborate to improve emergency and non-emergency medical transportation, retain
- > and expand existing healthcare facilities specifically in rural areas, and provide incentives to attract healthcare providers (physicians and facilities).

Improve public/private/civic cooperation, collaboration, and communication of the region's economic strategies.

- > Cooperate on a regional communications, marketing, and programming plan to strengthen and promote a sense of regional identity, expand opportunities, and increase youth retention.

Maintain regional evacuation plans and assist local governments with evacuation planning.

Quality of Life & Quality Places

Protect natural resources to support quality environment and ecotourism.

- > Provide for connectivity of targeted conservation and preservation lands on both public and private lands.
- > Increase conservation lands by implementing local government incentives through comprehensive plan provisions, tax incentives, and other innovative programs to encourage landowners to participate in conservation programs.

Develop projects that improve the region's quality of life.

- > Integrate alternative modes of travel, including walkability, into new and existing communities.
- > Ensure access to high quality health care, including primary, specialty, and ancillary services.

Develop and maintain strategies for emergency and temporary housing.

- > Provide access to short-term emergency shelters, longer-term temporary housing, and additional rental units for coastal evacuees and local residents in the event of significant and long-term storm effects.
- > Adopt implementing regulations in the land development regulations and/or Code of Ordinances to address post-disaster residential and non-residential accommodations for each jurisdiction.



TARGET INDUSTRIES



Target Clusters are groups of businesses or industries within a geographic area that are similar in products, services, labor needs, or supply chains. Typically, clusters increase the productivity needed to compete nationally and/or globally. The CEDS Committee has recommended 5 target clusters and 6 sub-clusters for the 2022 CEDS. The cluster map above shows the relationships between target clusters, with the overlapping circles indicating those clusters that are significantly interconnected. The target clusters are consistent with the economic planning and initiatives within the five counties of the region.

Agriculture & Agriculture Business & Technology, & Vertical Farming

Agriculture is one of the traditional industries of the region. The primary industries are cattle farming and citrus, which has been undergoing a decline due to diseases reducing citrus production. Because of the need to transport the products of the region's agricultural industries to a global market, agriculture is closely linked to Logistics.

This cluster also contains the sub-cluster of Agriculture Business and Technology (which is also linked to Manufacturing) and Vertical Farming. As agricultural technologies continue to develop, new opportunities to improve the efficiency, productivity, and sustainability of agriculture will arise. Vertical Farming presents several opportunities to meet food production and consumption needs with low environmental and energy costs.

This cluster is also linked to the Tourism and Ecotourism cluster because of the region's agricultural heritage and resources, and the opportunities to link both activities.

Life Sciences & Health Care

Life Sciences and Health Care are already top employers throughout the region, and stand to see strong gains consistently in the future.

This industry cluster overlaps with the Research, Technology and Creative Industries industry cluster because of the close connection between the life sciences and the research and development of new technologies.

Logistics, Supply Chain, & Distribution

The region is gaining importance in the field of Logistics. Two major transportation freight corridors pass through the region: US 27, a major highway connecting the Miami area to the Central Florida area; and Interstate 4 in the far north of the region, connecting the Tampa Bay and Orlando metro area. With the opening of the CSX Integrated Logistics Center in Winter Haven and the progress of Americas Gateway Logistics Center south of the region in Glades County, the region is becoming a major logistics hub.

The Logistics industry is intertwined with the Manufacturing industry cluster, which requires transportation of both input and output materials.

Manufacturing & Advanced Manufacturing

Although employment in Manufacturing has experienced fluctuation in the region in recent years, this remains a key cluster. Manufacturing is linked to the sub-clusters of Agriculture Business and Technology and Advanced Manufacturing (which is also linked to the cluster of Research, Technology, and Creative Industries) because of the opportunities to manufacture goods available through new technology. Since the input materials and end products of manufacturing must be transported, this cluster also overlaps with Logistics.

Research, Technology, & Creative Industries

Research, Technology, and Creative industries continues to be a rising industry in the region. Significant regional assets include the Central Florida Innovation District, a mixed-use development near Auburndale in Polk County, and the Florida Polytechnic University campus near the interchange of Interstate 4 and the Polk Parkway. Other notable institutions are the Florida Industrial and Phosphate Research Institute in Polk County and Archbold Biological Station, an ecological research organization in Highlands County. The University of Florida IFAS Citrus Research and Education Center is located between Winter Haven and Haines City and assists the state citrus industry with developmental needs through its Research, Extension and Teaching programs.

It's the University of Florida's oldest and largest off campus experiment station in the UF Institute of Food and Agricultural Services and is unique among research centers in that it focuses entirely on one commodity, citrus.

This cluster overlaps with the Life Sciences & Healthcare cluster because of the close connection between the life sciences and the research and development of new technologies, and with the Advanced Manufacturing sub-cluster because of the close relationship between research and manufacturing specialized goods or materials with the benefit of new technologies.

Tourism & Ecotourism

The region's most prominent tourism attractions include LEGOLAND Florida Resort, Bok Tower Gardens, and the SUN 'n Fun Aerospace Expo in Polk County. Traditional tourism still plays a large role in the regional economy. However, in recent years ecotourism has become an important part of the tourism economy, with Lake Okeechobee as the largest ecotourism destination in the region. The region's unique natural features and large amounts of open space offer great potential for ecotourism. The region is home to more than 550 lakes, as well as The Lake Wales Ridge, which is home to a globally unique ecosystem, and many trails, parks, and nature preserves, including Circle B Bar Reserve.

Ecotourism related to the unique natural resources in the region is becoming more prominent, with residents and visitors taking advantage of the hiking, fishing, and birdwatching opportunities throughout, as well as resorts and golf courses developed around the natural resources and the special opportunities they provide.

The Tourism & Ecotourism industry cluster overlaps with the Agriculture cluster because of the opportunities presented by the region's agricultural heritage and resources. Agritourism has become increasingly popular, integrating tourism with recreational, entertainment, and educational opportunities that support the regions economy.

Business Services

Business Services has been a major employment industry in the region for a number of years, and that trend is expected to continue. The state of Florida hosts a significant number of professional and technical business service companies and that is reflected in the Central Florida region. The region has a strong CareerSource presence which connects employers to the talent needed for this industry cluster.

The Business Services cluster is not shown as connected to any other target industry but is intertwined with all clusters.

Energy

Energy generation to produce electricity continues to be a growing part of the regional economy. The region houses power producing plants using natural gas and coal; one that uses steam, and one that runs on the waste byproducts of a landfill. A natural gas plant has completed all regulatory approvals and will utilize the natural gas transmission line which traverses portions of Okeechobee and Polk Counties. With several solar fields throughout the region and many more planned, traditional and alternative energy production and distribution will continue to grow.



TARGET INDUSTRY CLUSTERS

Proximity to airports with air service capacity positively impacts the economic base of the region. The impacts of various on-airport and off-airport activities serve as drivers of economic growth stimulating business attraction, recreation, and commercial activities. Central Florida is home to nine general aviation airports which provide goods movement, private passenger travel, and host a number of aircraft and aviation service providers. Aviation & Aerospace is an emerging and important industry cluster in the region, intersecting with several other industry clusters, improving the STEM pipeline for aerospace professionals and contributing significantly to the state and local economy.

Polk County (4)

Winter Haven's Gilbert Airport

The Winter Haven Regional Airport is a regional center of economic aviation activity located in a Federal Opportunity Zone and a locally designated Industrial Development Zone. Over \$25 million in recent infrastructure investments including ramps, runways, operational equipment, terminal and Winter Haven High School's Aviation and Aerospace career academy position the airport for accelerated growth in the next decade. The City of Winter Haven has invested in water, sewer and broadband infrastructure installation throughout the airport to encourage and enable new private investments under its master plan. The City is currently developing multiple pad-ready hangar sites to support expansion of aviation related businesses.

Additionally, Winter Haven Regional Airport is slated to build a digital remote air traffic towers to improve safety, with construction anticipated to be completed by September 2024. With an estimated project cost of \$1.23 million, this project will transition the airport from uncontrolled to controlled airspace and will be operated and controlled from Bartow Executive Airport.

Lakeland Linder International Airport

Lakeland Linder International Airport (LAL) has over 308 based aircraft with 143,000 in aircraft operations and is ranked the 98th busiest airport in the United States. LAL is perhaps best known as the home of the annual Sun 'n Fun Aerospace Expo which draws 150,000 people from 85 different countries and over 2,000 aircraft to LAL each spring transforming the airport into the busiest in the World. In addition, LAL hosts several smaller events throughout the year including pilot proficiency programs, aviation seminars, as well as Academy of Model Aeronautics events.

Some of LAL's notable tenants include the NOAA Hurricane Hunters, Draken International (a DOD contractor), and most recently the addition of Amazon Air's Regional Air Cargo Hub. Altogether, there are currently 65+ businesses and organizations located on the field with over 3,000 people coming to work at the airport daily. According to a recent economic impact study completed in April 2021, LAL's annual economic impact was over \$1.5 Billion. In addition, LAL eclipsed other major airports in Florida becoming the State's fourth busiest cargo airport in 2021.

Development targets for the airport include commercial air service, increased MRO activity, international air cargo, increased military and general aviation operations, as well as aerospace educational opportunities. Some of those educational opportunities that already call LAL home include five flight schools, Polk State College, Southeastern University, and Travis Technical College's aerospace programs, the Florida Air Museum, the Central Florida Aerospace Academy (a public high school with an aviation focused curriculum), and the Aerospace Center for Excellence.

The airport maintains a Class I Part 139 Airport Operating Certificate with Index B (capable of Index C) Aircraft Rescue Fire Fighting (ARFF) services and sees occasional air carrier charter operations. Equipped with excellent general aviation facilities including two Fixed Base Operators (FBOs), LAL also boasts a CAT III Instrument Landing System, 8,500' long primary runway (and two supplemental runways including a 5,000' crosswind runway and 2,205' long turf runway), a 30,000 sq.ft. passenger terminal facility, over two (2) million square feet of leasable space, and 24/7/365 Airport Operations, Air Traffic Control, and ARFF coverage.

Bartow Municipal Airport

Bartow Municipal Airport encompasses approximately 1,804 acres, has three paved runways-two measuring 5,000 feet each and one measuring 4,400 feet. The airport has a large industrial park with over 60 buildings and a variety of tenants including cold storage, water treatment facility, and trucking. The airport features flight school and aircraft rentals along with full serving fueling. The existing inter-modal area consists of approximately 40 acres; approximately 8000 linear feet of rail spurs and has approximately 380,000 square feet of existing warehouse, distribution, and shed type facilities.

Additionally, Bartow Executive Airport plans to construct its own digital tower and command center with an expectation to finish the tower in late May or June of 2024. The remote digital towers could provide additional learning opportunities for the air traffic control academy proposed by Polk County School District.

Lake Wales Municipal Airport

Lake Wales Municipal Airport has undergone several major improvements. The City of Lake Wales recently received a grant from the Florida Department of Transportation to install self-serving fuel farms, attracting larger jets to the city and allowing pilots to stay for longer periods of time, creating ripple effects on the local and regional economy.

Lake Wales Municipal Airport has two intersecting runways measuring 5,400 and 3,860 feet respectively with 485 acres of land. The airport accommodates general aviation aircraft and supports many types of general aviation activities. The airport is also used for localized recreational glider activity, and skydiving contributing to the airport's economic impacts.

Local Economic Impact: \$ 879,179,000

Source: March 2019 Florida Statewide Aviation Economic Impact Study, Florida Department of Transportation

DeSoto County (1)

Arcadia Municipal Airport

Highway 17 and the Peace River guide your way to Arcadia Municipal Airport. The airport features two runways; 3,700 foot paved runway, and a 2,780 foot unpaved strip. The airport serves the general aviation needs of the local community and covers 210 acres.

The airport accommodates one of the biggest events for the local community, the annual Rodeo Weekend Fly-In/Camp-Out which complements the Arcadia All-Florida Championship Rodeo, the largest and longest running rodeo in Florida. The rodeo generated \$1.2 million for local tourism in 2019 and attracts an estimated 20,000 spectators.

Local Economic Impact: \$ 4,953,000

Source: March 2019 Florida Statewide Aviation Economic Impact Study, Florida Department of Transportation

Okeechobee County (1)

Okeechobee County Airport

Okeechobee County Airport has two intersecting paved runways measuring 5,000 and 4,001 feet respectively. The airport supports general aviation and business jet aircraft. Okeechobee Airport consists of 852 acres, including the airfield and the Commerce Park. Easy access to the airport is available from US 98 and US 441. With almost 100 acres, the Okeechobee County Airport Commerce Park is home to more than a dozen companies, including aeronautical and non-aeronautical businesses. Additionally, Okeechobee houses a County owned incubator building within the Commerce Park consisting of several 4,500 square foot bays.

Local Economic Impact: \$ 37,332,000

Source: March 2019 Florida Statewide Aviation Economic Impact Study, Florida Department of Transportation

Hardee County (1)

Wauchula Municipal Airport

The total property size of the Wauchula Municipal Airport includes approximately 207 acres with 2 acres of existing taxiway access. Construction of T-hangars, other commercial/industrial business property interests, or other aviation interests would have immediate access to the existing taxiway. There is land available for future development of additional commercial, industrial, or aviation industries.

During the 12-month period ending on July 14th, 2022, the Wauchula Municipal Airport observed 62.6 daily operations for a total 22,873 yearly operations. In addition to single engine, multi engine, and helicopter operations the Wauchula Municipal Airport experienced business jet, glider, and military aircraft operations as well. There are extensive student pilot operations conducted at the Wauchula Municipal Airport as well as para-power glider training.

The Wauchula Municipal Airport has hosted the annual Benson Days fly-in event for more than 3 ½ decades and is known as a world class rotorcraft event. During the annual three-day event the airport witnesses an increase in the number of gyrocopter operations and is attended by gyroplane flight instructors, gyroplane designated pilot examiners, gyroplane pilots & enthusiasts as well as the general public.

Local Economic Impact: \$ 3,627,000

Source: March 2019 Florida Statewide Aviation Economic Impact Study, Florida Department of Transportation

Highlands County (2)

Sebring Regional Airport

US Highway 98 is the major East-West route and lies one mile south of the park. US Highway 27 is the major North-South corridor, 4.5 miles West of the Airport. These roads, together with other state highways link the area to the Florida Turnpike and three interstate highways: I-4, I-95 and I-75. Highlands County is well served by interstate and intrastate motor freight lines through all major carriers, and overnight delivery service is available. Sebring Regional Airport is located in Highlands County, and has two runways measuring 5,234 and 4990 respectively feet. The airport serves a variety of general aviation activities for local and transient users.

The Sebring Regional Airport houses the Sebring International Raceway. The racetrack hosts major events throughout the year that contribute significantly to the airport's overall economic impact and is home to one of the most famous races in the world – the 12 Hours of Sebring International Grand Prix of Endurance.

Avon Park Executive Airport

The Avon Park Executive Airport is a 450-acre site located in the City of Avon Park, in the northwest corner of Highlands County. The airport has two intersecting runways measuring 5,374 and 4,990 feet. The airport supports flight training, recreational/sport aviation activities and accommodates smaller general aviation aircraft as well as business jet aircraft.

Local Economic Impact: \$ 378,046,000

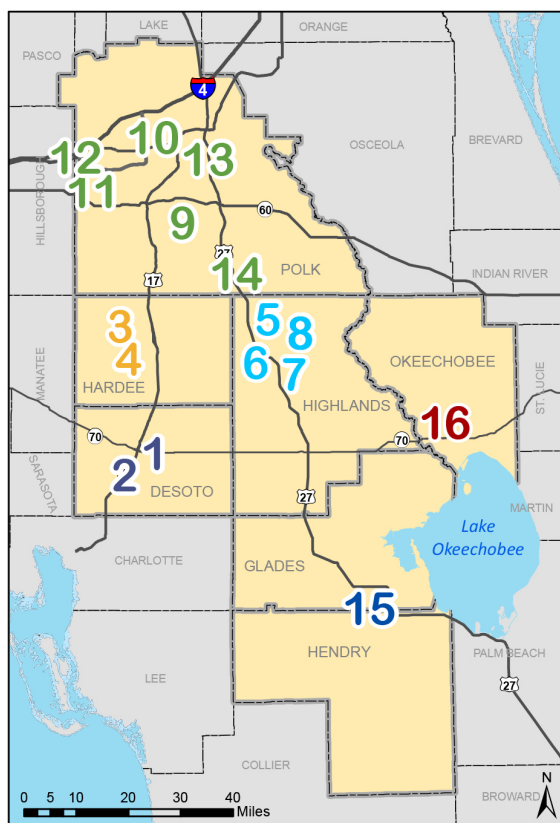
Source: March 2019 Florida Statewide Aviation Economic Impact Study, Florida Department of Transportation



OPPORTUNITY AND INVESTMENT AREAS

Opportunity and investment areas in the region are identified based on compatibility with the CEDS goals and the Six Pillars, and are expected to make a future impact on the regional or local economy based on the suitability and marketability of the site; or, because of the investment that has already been made on the site.

As projects are considered for public funding opportunities, priority will be given to those that are compatible with the goals of the CEDS and are aligned with the Six Pillars. Priority projects impact the regional economy in terms of job creation for the local or regional populace, or as catalysts for future development. Completed projects that are viewed as catalysts for additional future development and employment may also be identified as ongoing opportunities and investments in the region.



Opportunity and Investment Areas

(Numbers do not imply priority)

- 1 DeSoto County G. Pierce Wood Memorial Hospital Complex / Business Park
- 2 DeSoto Park Industrial Area
- 3 Hardee County Commerce Park
- 4 Wauchula Airport
- 5 North Highlands Industrial Area
- 6 Avon Park Airport
- 7 Sebring Multimodal Logistics Center and Business Park
- 8 Lake Placid Business & Industrial Park
- 9 Winter Haven Intermodal Logistics Center
- 10 Florida Polytechnic University/Central Florida Innovation District
- 11 Lakeland Linder International Airport/West Lakeland Area
- 12 Lakeland Central Park
- 13 Haines City Industrial Park
- 14 Nucor Steel
- 15 Americas Gateway & Airglades Airport
- 16 Okeechobee Commerce Center / Okeechobee Airport Area

DeSoto County

DeSoto County G. Pierce Wood Memorial Hospital Complex/Business Park

The former G. Pierce Wood Memorial Hospital Complex consists of 803 acres with approximately 80 existing buildings, air hangers, and a Federal Aviation Administration (FAA) permitted grass air-strip. The property was formerly a federal air base, and subsequently a mental health facility and juvenile justice facility; the latter closed in 2011. Site visits were conducted by FHERO, the DeSoto County EDO, and the Florida Polytechnic University in an effort to develop a list of appropriate uses and private interest in the site's redevelopment. Preliminary marketing plans are being developed, and further legislative initiatives are anticipated with regard to the site's long-term use.



DeSoto Park Industrial Area

This 586 acre, Heavy Industrial zoned property is strategically located on Hwy 17 in Desoto County, directly adjacent to Walmart's 171 acre Distribution Center campus. Desoto Park is located within the Desoto County Enterprise Zone, offering financial incentives to businesses located within the zone. The location of the property provides a strategic opportunity for distribution and warehousing to service the West and Southwest coast of Florida. The property gains its access via Enterprise Boulevard just to the North of the Walmart Distribution Center, and an access drive on the southern border of the Walmart Distribution Center. There is an active Southwest Florida Water Management permit for the 586 acres.

Hardee County

Hardee County Commerce Park

The Hardee County Commerce Park is a 160-acre shovel-ready manufacturing and light industrial incentivized development located in north central Hardee County. It is fully supplied with all utilities, including broadband availability. It is managed by the Hardee County Industrial Development Authority. The Commerce Park also houses a Sheriff's Office Substation. The Park is within close proximity to rail as well as two major highways, making the location ideal for goods and supply movement.

Wauchula Airport

The Wauchula Municipal Airport (CHN), located at 1202 Maurice 'Sonny' Clavel Rd., is approximately 5 miles southwest of Wauchula and is owned by the City of Wauchula. Since its opening in September of 1983, the Wauchula Municipal Airport has played an integral role in the Central Florida region's aviation system by providing flight training, aircraft storage, and 100 low lead fueling operations. In addition to recreational aircraft operations, the airport serves many local businesses, including agricultural spray operators for the local agricultural industry and natural disaster emergency relief operations to the Bahamas and Caribbean.

The Wauchula Municipal Airport has a runway length of 4,005 feet which underwent a complete rehabilitation and resurfacing in 2017 with a total investment in excess of \$3.1 million. Currently, there are 38 hangars located at the airport. These hangars house 23 single engine, 1 multi engine, 5 helicopters, and several gyrocopter style recreational aircraft.

The City of Wauchula continues to be aggressive in the ongoing development of the airport and has the following projects identified and in progress:

Project Description	Status
Taxiway Rehabilitation	Funded / Construction Phase
Automated Weather Observing Station II	Funded / Construction Phase
Terminal Building / Pilots Lounge	Funded / Design Phase
Runway Extension (1,200 linear feet)	Justification Study In-Progress
T-Hangars	Funded / Design Phase
Apron Expansion	Funded / Design Phase

Highlands County

Sebring Airport Authority and Multimodal Logistics Center

The Sebring Airport Authority was established to acquire, lease, as lessee or lessor, construct, reconstruct, improve, extend, enlarge, equip, repair, maintain, and operate an airport and other industrial facilities (including tire & automobile testing and racing) which are located on the property of the Sebring Airport Authority. The Sebring Airport Authority also operates and maintains a foreign trade zone status for the region.

The Commerce Park is a 2,134-acre facility offering a full range of leasing and purchase options with a wide variety of parcels available ranging in size from one acre to as much as 600 acres. The airport/commerce park has been master planned with an aggressive capital improvement program underway. Drainage, roadways, the airport apron, the CSX rail spur, and a runway extension are all under development.

The Sebring Airport Authority is also supported by the only Community Redevelopment Agency “inside the fence” in the US. The CRA is a government agency created by the citizens of Highlands County in November 1996 to grow and develop the boundaries of Sebring Regional Airport.

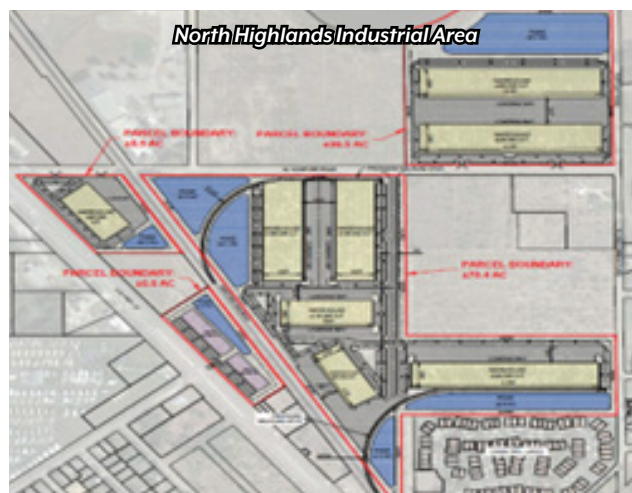
North Highlands Industrial Area

This is a 123-acre rail served site located in North Avon Park, just South of Nucor Steel Corporation’s 22nd micro-mill steel rebar facility. Located equidistant from I-75 and I-95 and 44 miles South of I-4, this property is accessible to CSX rail and has frontage on US Highway 27. Duke Energy, TECO Peoples Gas, and Avon Park (water & wastewater) provide all the utilities on site. There are multiple options for telecom.

A Phase-1 Environmental Site Assessment has been completed which includes a Limited Subsurface Exploration, Preliminary Geotechnical Engineering Services, Preliminary Wetlands Determination, and a Preliminary Threatened & Endangered Species Survey. Foreign Trade Zone 215 based at the Sebring Airport covers this site.

Avon Park Executive Airport

The Avon Park Executive Airport is a 450-acre site preparing to start more than \$40 million in improvements to the infrastructure, apron, runways, safety and security compliance, and more. The adjacent industrial park is a new 300-acre site being created as an industrial park bordering the airport. The total 750+ acre site is undergoing a Site Readiness Program investment by Duke Energy to assess, market, and help develop this area. Duke Energy is the power provider with the city of Avon Park providing the water and wastewater infrastructure with Sebring Gas supplying service for this utility. A Phase-1 Environmental Site Assessment will be completed which includes a Limited Subsurface Exploration, Preliminary Geotechnical Engineering Services, Preliminary Wetlands Determination, and a Preliminary Threatened & Endangered Species Survey. Foreign Trade Zone 215 based at the Sebring Airport covers this site as well.



Lake Placid Business & Industrial Park

The 370-acre site located in south-central Florida is uniquely situated equally between the Orlando, Miami and Tampa markets, serving all three markets within a 90-minute or less drive. The site offers logistical access as it is adjacent to state Highway 27 and offers more than 1 mile of active rail line adjacent to the property along the eastern boundary. Offering ample water (6-inch line is located 1,200 feet south of the property), wastewater (6-inch force main is located 2,000 feet south of the property) and electric capacity (two 12.47kV lines adjacent to the site with a combined capacity of 15MW). The property would be ideal for manufacturing- and distribution-related businesses that serve the neighboring major metros.



Okeechobee County

Okeechobee Commerce Center/Okeechobee County Airport Area

The Okeechobee Commerce Center is a 124 acre industrial park owned by the City of Okeechobee. It sits next to the CSX rail line and is located near US 441. The Commerce Center has full infrastructure on the site, including high speed internet. Included in this opportunity area is the Okeechobee County Airport and Industrial Park, located in unincorporated Okeechobee County. The airport consists of 852 acres, including the airfield and the Industrial Park. Easy access to the airport is available from US 98 and US 441. The Industrial Park is home to several active businesses as well as a County-owned Incubator consisting of three 4,500 square foot bays.

Polk County

Winter Haven Intermodal Logistics Center

The Gateway Area in Polk County centers around the Central Florida Intermodal Logistics Center (or CSX ILC). This industrial area is anchored by the 318-acre CSX intermodal terminal that has capacity to process up to 300,000 containers a year and is designed for scalable expansion as freight volumes continue to grow. It also includes over 2,000 acres of industrial and business park future land use that lies within this key logistics center area. The facility provides a centralized hub for transportation, logistics and distribution serving Orlando, Tampa and other regional Florida markets. Tratt Properties is the owner/developer of nearly 900 acres of the fully entitled industrial property with development potential of nearly 8,000,000sf. Tratt Properties is currently under construction with a 1,200,000sf distribution center. Coca-Cola and Florida Can Manufacturing operate in 407,000sf and 350,000sf facilities respectively with their distribution and manufacturing operations that are scaling up to over 500 employees. A new roadway is funded, and design is underway to extend Logistics Parkway north to Pollard Rd. This will create access to additional industrial property that was entitled in 2019-2020 for more than 2 million sf. of industrial development while providing superior access to the industrial park for employees. Other nearby properties include Clear Springs, a sector plan with approved industrial and research and development entitlements for over 17 million square feet. Near the Polk Gateway area is the Lake Wales Commerce and Technology Park, a 25-acre site two miles south of Lake Wales along US-27. Originally a public-private partnership, the Park is now privately owned and is currently home to Merlin, the parent company to LEGOLAND Florida Resort, as well as a winery and an equipment manufacturing company. The Park is ideal for light manufacturing, distribution, or other diverse industries as a large investment was made to provide infrastructure including roads and utilities to the site.



Central Florida Innovation District

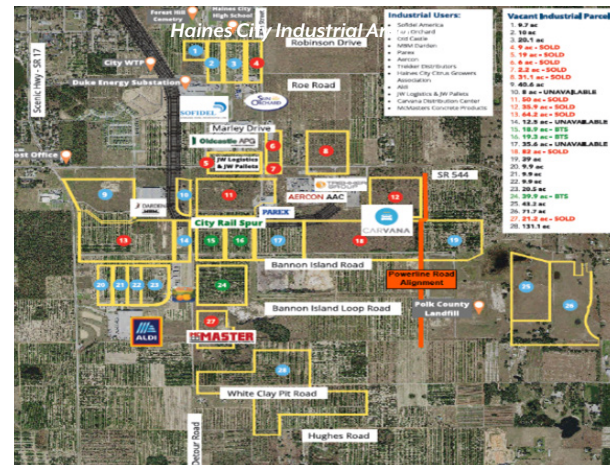
Florida Polytechnic University is the state's newest university, and the only public polytechnic university in the state. The university collaborates with high-tech corporate organizations to assist with research and provide internship opportunities. Partners include Microsoft, Lockheed Martin, Cisco, and Mosaic. The University also has a partnership with the Florida Department of Transportation (FDOT). Included in the Opportunity area is the Polk Commerce Center, just east of the University, where infrastructure is in place to accommodate business park growth. The area includes SunTrax, a research, development, and testing facility for emerging transportation technologies; and the Florida Industrial and Phosphate Research Institute (FIPR).

Lakeland Linder International Airport/West Lakeland

Located in Polk County, Lakeland Linder International Airport is comprised of 1,742 acres, 2 million square feet of leasable space, and more than 250 acres available for development. The airport currently houses 60+ tenants in aviation and defense contracting, including the National Oceanic and Atmospheric Administration's (NOAA) Aircraft Operations Center, the Aerospace Center for Excellence / SUN 'n FUN Aerospace Expo, the Amazon Air Regional Air Cargo Hub, the Central Florida Aerospace Academy, and Polk State College / Southeastern University's aerospace programs. West Lakeland is home to a growing aerospace and logistics industry with over 7 million square feet allocated for further development.

Haines City Industrial Area

The Haines City Industrial Area is located to the south of Haines City. Companies that manufacture and distribute items such as food, lumber, trusses, pavers and other housing components have located in and around the industrial park area to take advantage of its prime location and the City's rail spur connection to the main CSX line. The 2.8 mile railroad spur connects the central CSX railroad line through the City to the Haines City Industrial park located along County Road 544. The \$5 million construction project was completed in 2005 and funded in part through a grant from the U.S Department of Commerce. The railroad spur allows tenants of the Haines City Industrial Park to ship products safely and efficiently by rail to most major U.S. cities. The Haines City Industrial Area is located in the "Heart of Florida's" I-4/Highway 27 Corridor in the Logistical Center of Florida between Orlando and Tampa. This industrial area is accessible to a market of 1 million people within 100 miles. Whitley Capital is the newest investor in Haines City. They have purchased two rail served sites, as well as an additional 25 acres to develop the Haines City Rail Center. Duke Energy also sees great value in Haines City. The Duke Energy Site Readiness / Lorenz site sits on 109.5 acres, ready to develop your next target industry project.



Lakeland Central Park

Lakeland Central Park is one of Lakeland's newest industrial logistics park, located adjacent to the Polk Parkway minutes from Interstate-4 and with access to all major freeways include Interstate 75 and US Highway 27. The Park offers 740-acres of land that can support up to 5M SF of industrial space. The Park is designed to satisfy the most demanding standards of the logistics and distribution companies in America. The property benefits from an abundance of land and will contain generously sized roadways, driveways, parking areas, truck courts, and turning radii. All buildings will be able to accommodate paved areas for above typical truck drops and employee parking requirements.

Nucor Steel Area

The Nucor Florida steel plant, located near the Polk-Highlands County line, is approximately eight miles south of Frostproof, four miles north of Avon Park, and 0.5 mile east of US 27. The Micro Mill is built on approximately 183 acres within the 480-acre property, which consists of a processing plant, materials storage yard, slag processing area and pond, scale house, administrative buildings, stormwater pond, a railroad spur line, and access roads for trucks hauling material. The arrival of the plant and the extension of water lines to the site and surrounding land provide for expanded job and development opportunities for Polk and Highlands County.

Heartland Region Impact

Americas Gateway in Glades County & Airglades Airport in Hendry County

Americas Gateway Logistics Center will be a master-planned, mixed-use, integrated logistics center comprising 770 acres near Moore Haven in Glades County, and will include advanced manufacturing operations, distribution centers, an intermodal center, and other transportation/logistics and service-related facilities. The Center will serve as an export and import hub for emerging markets in Latin America as well as Asian markets via the Port of Miami, Port Everglades, Port Manatee, Port of Palm Beach, and international airports including the developing Airglades Airport proposed to be a cargo hub in Hendry County. Although not located in the EDD's region, this project will impact the entire Central Florida area.

Regionwide Energy Investments & Opportunities

Okeechobee County

- The Sobek renewable natural gas (RNG) project includes the construction of new anaerobic digesters at four Larson family dairy farms in Okeechobee County, Florida. Two of the farms are owned by Larson Dairy, Inc. and two owned by JM Larson, Inc. After the project is complete, the digesters are anticipated to generate renewable natural gas each year. The gas will be delivered into the local, interstate gas pipeline system. The project is part of the recently announced joint venture Brightmark RNG Holdings LLC, a Brightmark platform in partnership with Chevron U.S.A. Inc.

Highlands County

- Duke Energy has built a 18-megawatt lithium battery site, located at the company's 45-megawatt Lake Placid Solar Power Plant in Highlands County. The addition of battery storage to the utility-scale solar plant is the first of its kind for Duke Energy Florida, allowing solar energy to be dispatchable by the company's grid operators, improving overall plant efficiency. The versatility of battery storage allows Duke Energy to maximize benefits to customers and the grid, helping to reduce costs for customers and increase operational efficiencies.

Hardee County

- Through the Clean Energy Connection program, Duke Energy Florida customers can subscribe to solar power and earn credits toward their electricity bills without having to install or maintain their own equipment. The Fort Green Renewable Energy Center located in Hardee County is the first of 10 solar sites, totaling 750 megawatts (MW), that are part of the company's new community solar program.

The 74.9-MW facility was built on approximately 500 acres of repurposed mining land in Hardee County and consists of nearly 265,000 solar panels. The facility utilizes a fixed-tilt racking system that will produce enough carbon-free energy to effectively power more than 23,000 average-sized homes at peak production.

Polk County

- In 2018, Duke Energy announced a project to upgrade the transmission system in Polk County. To help meet the increasing demand for energy in the region, the company plans to construct a new transmission substation adjacent to the Osprey Energy Center and two new transmission lines. The first of the two new lines is a 21-mile transmission line between the new Osprey Substation, currently under construction, and the existing Haines City Substation.

Tampa Electric operates five utility-scale solar plants in Polk County, with more to come. Tampa Electric has invested in over 900 megawatts of solar, making it the largest producer of solar energy (by percentage of generation) amongst the state's investor-owned utilities. The company's Polk Power Station near Mulberry has provided energy to the community for more than 25 years.

- Duke Energy has begun construction on a two-acre floating solar project at its Hines Energy Complex in Bartow, at 7700 County Road 555. The pilot will include 1,800 solar modules that can produce nearly 1 megawatt of electricity and about 1 million kilowatt-hours annually. The pilot will test the efficiency and technology capabilities behind floating solar compared with land-based solar farms.
- TECO Energy is building a new solar farm in portions of Dundee and Lake Wales between US 27 and Scenic Highway and along Waverly Road. The Solar plant will generate 74.5 megawatts of electricity, produce zero emissions during power generation, produce virtually no traffic and use minimal amounts of water to operate.
- LowCarbon America Corporation plans on building a 10-acre research hub for clean hydrogen technology on Old Highway 37 in Unincorporated Polk County. The company expects to invest more than \$100 million in development of the facility and 150 on-site jobs paying annually more than \$60,000, according to the release.

More information on the contents of the Comprehensive Economic Development Strategy for Central Florida may be found in the CEDS Data Document at www.cfrpc.org/CEDS/ including:

Regional Economic Development

- > Florida 2030 Community Survey - Town Hall Meetings

Economic Resilience

- > Action Plan Strategies
- > CEDS Committee

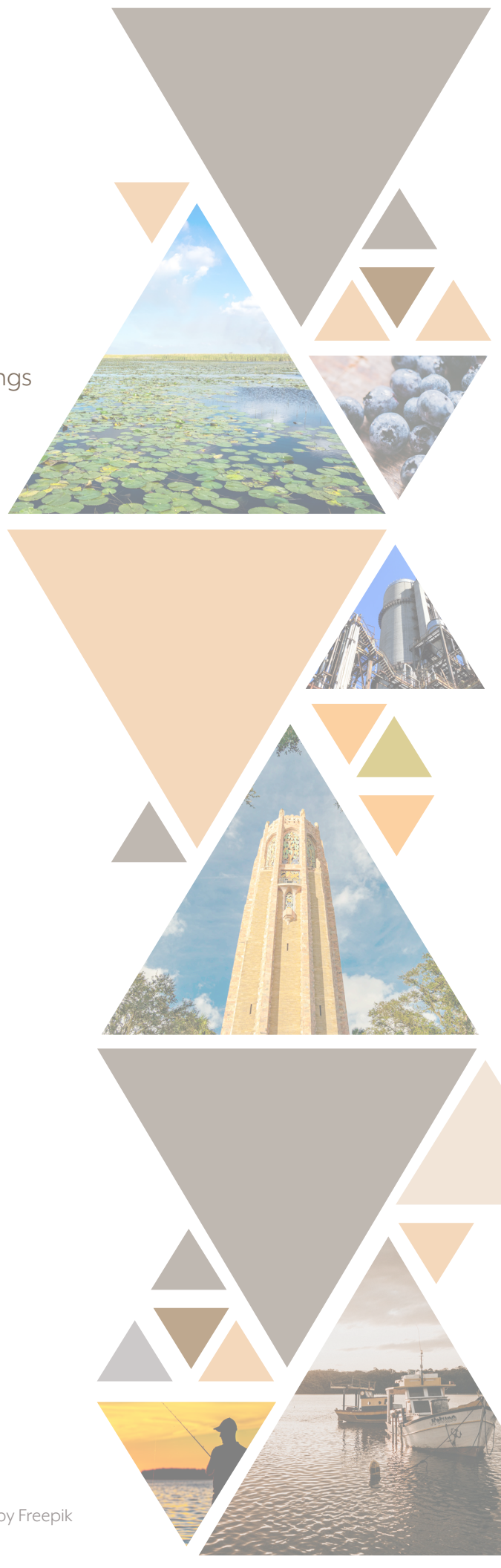
State and Local Economic Development Plans

Performance Measures (Six Pillars) & Monitoring

- > Average Annual Wage
- > High School Graduation Rates
- > Gross Domestic Product
- > Bed Tax Collections
- > Trade Export
- > Population Counts and Projections
- > Populations Estimates
- > Annual Building Permits
- > Vehicle Miles Traveled per Lane Mile
- > Average Annual Unemployment Rates
- > Employment by Industry
- > Wages by Industry
- > Registered Nonprofit Organizations (501(c)(3) only)
- > Per Capita Income
- > House Cost Index
- > Persons Living in Poverty

Shift-Share Analysis

Location Quotient Analysis





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