

## Appendix

# County-Level SWOT

## Bosque

### Demographic Summary

- Population has been steadily declining and Texas population projections predict a decline in population in the region over the next 30 years.
- Fully one-quarter of the residents are of retirement age, and the median age is 12 years higher than the state median age.
- 52% are of working age (20-64); on par with the region (56%), and slightly lower than the state (59%).

### Economic Summary

- Majority of employment falls under Management, business, science, and arts occupations and Sales and office occupations.
- Bosque County has seen a decrease in the labor force from October 2019-2020 (-114) and an increase in unemployment, although the rate is lower than the Heart of Texas region and the State of Texas.
- Educational services, and health care and social assistance employ the most individuals in Bosque County, while Information jobs provide the highest wages.
- Proximity to DFW Metroplex
- High median wage compared to the region; second highest among all counties
- Strong local small business climate

### Sources of economic growth

- Tourism and weekend-home economies from beautiful scenery
- Arts community and wineries

### Sources of economic challenge

- Older population
- Low industrial base
- Coal, oil, and gas leaving the region
- No population centers
- Low educational attainment

## Needs

- Housing
- Community development
- Workforce development
- Infrastructure
- Water supply
- Transportation enhancements
- Improved internet access

## Unemployment over time:<sup>236</sup>

- Population: 18,882
- UI Claimant Count: 164

## Top 5 UI Claim Industries

1. Oil and gas pipeline construction
2. Temporary help services
3. Nursing care facilities, skilled nursing
4. Full-service restaurants
5. Commercial machinery repair and maintenance

	<b>Employment October 2020<sup>237</sup></b>	<b>Employment October 2019</b>	<b>Labor Force October 2020</b>	<b>Labor Force October 2019</b>
<b>Texas</b>	13,115,800	13,663,754	14,084,000	14,160,862
<b>Bosque</b>	7,872	8,101	8,260	8,374
<b>Heart of Texas</b>	159,427	161,035	168,742	166,398
	<b>Unemployed October 2020</b>	<b>Unemployment October 2020</b>	<b>Unemployed October 2019</b>	<b>Unemployment October 2019</b>
<b>Texas</b>	968,200	6.9	497,108	3.5
<b>Bosque</b>	388	4.7	273	3.3
<b>Heart of Texas</b>	9,315	5.5%	5,399	3.2%

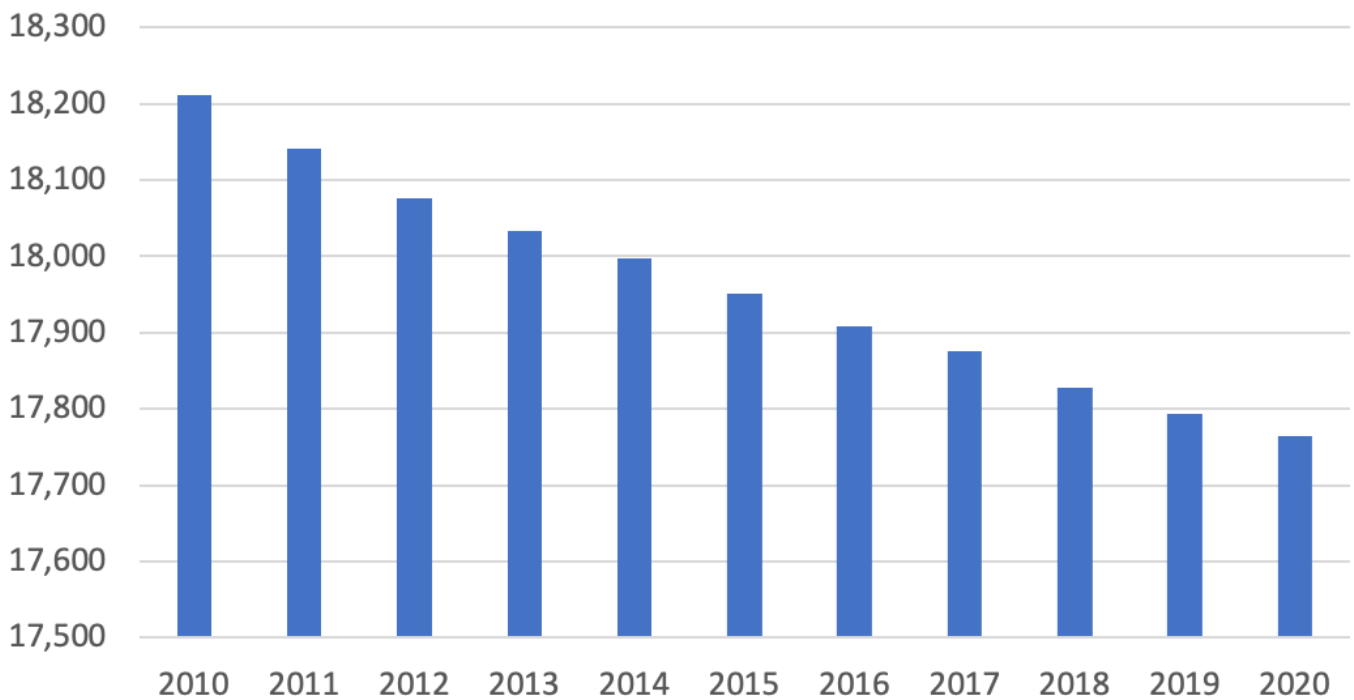


**Facts:**

- Current Population:<sup>238</sup> 18,296 (5th most populous county in the Heart of Texas region)
- Median Household Income: \$50,882 (+/-2,214)<sup>239</sup>
- Median Age:<sup>240</sup> 46.6 vs. Texas Median Age: 34.6 vs. United States Median Age: 37.9
- Percent of working-age civilians in labor force: 57.3%<sup>241</sup> (61.2% in Texas, 61.7% in U.S.)<sup>242</sup>
- Student to teacher ratio: 10.8 (or 11 to 1)<sup>243</sup>
- Percent of children under age 18 in poverty: 19.7%<sup>244</sup>
- Percent of students enrolled in free or reduced lunch: 62%<sup>245</sup>

**Population over time:**<sup>246</sup>

Bosque

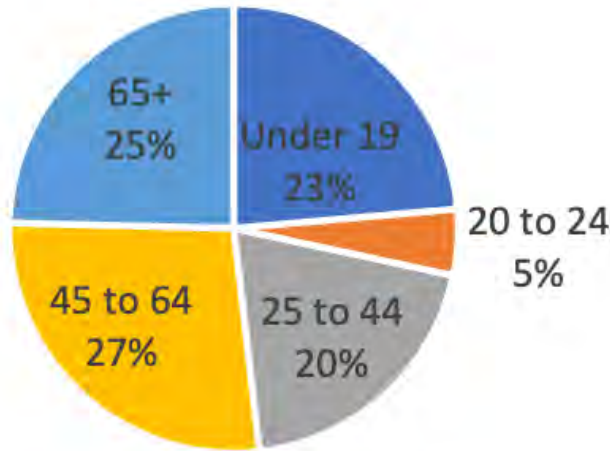


**Age Distribution**<sup>247</sup>

- Fully one-quarter of the residents are of retirement age, and the median age is 12 years higher than the state median age
- 52% are of working age (20-64); on par with the region (56%), and slightly lower than the state (59%)



## Bosque County

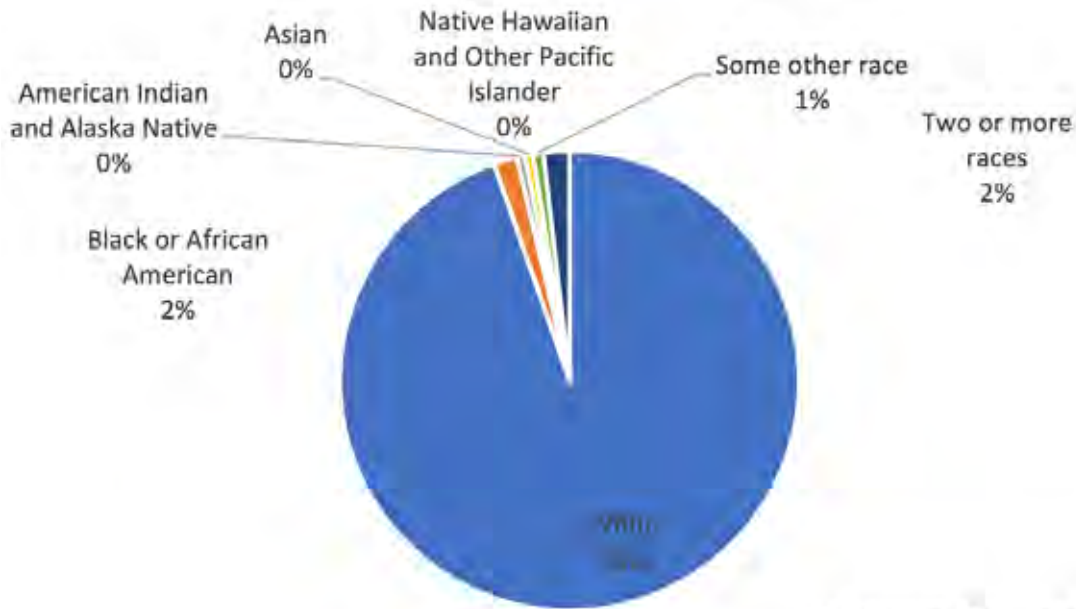


■ Under 19 ■ 20 to 24 ■ 25 to 44 ■ 45 to 64 ■ 65+

248

### Race/ethnicity distribution<sup>249</sup>

• Bosque County is 95% white, showing little diversity



Bosque County

250



**Housing**<sup>251</sup>

- More than 25% of housing in Bosque County is vacant

	Texas	Bosque	Falls	Freestone
<b>HOUSING OCCUPANCY</b>				
Total housing units	10,937,026	9,767	7,781	9,495
Occupied housing units	88.60%	73.80%	66.80%	71.20%
Vacant housing units	11.40%	26.20%	33.20%	28.80%
	Hill	Limestone	McLennan	Heart of Texas
<b>HOUSING OCCUPANCY</b>				
Total housing units	16,337	10,731	101,142	155,253
Occupied housing units	79.50%	78.10%	89.00%	84.1%
Vacant housing units	20.50%	21.90%	11.00%	15.9%

Bosque county has a lower education level compared to the State of Texas. Education level is linked to higher skilled jobs and thus, higher wages.

**Economic Distress Criteria**<sup>252</sup>

- Bosque county has the highest threshold calculation for Per Capita Personal Income at 75%

**Economic Distress Criteria–Geographic Components**

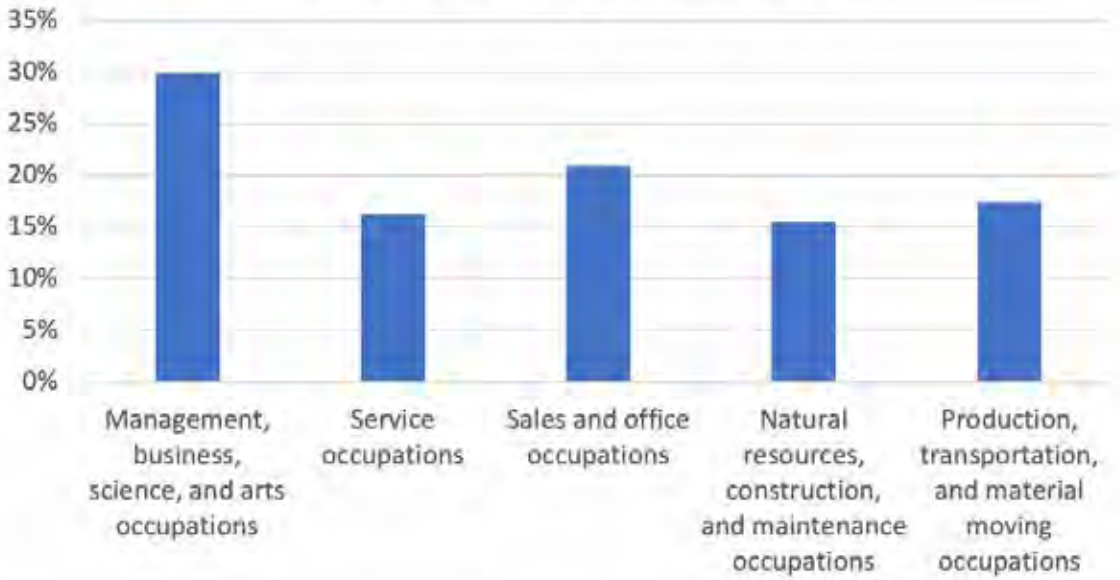
	24-Month Unemp	Threshold Calculation	2019 Per Personal Income (BEA)	Threshold Calculation	ACS 5-Year PCMI	Threshold Calculation
<b>Bosque County, TX</b>	4.31	-1.3	\$42,366	75	\$26,636	78.1
<b>Falls County, TX</b>	4.36	-1.25	\$35,258	62.4	\$18,745	55
<b>Freestone County, TX</b>	6.32	0.71	\$38,182	67.6	\$24,621	72.2
<b>Hill County, TX</b>	4.55	-1.06	\$41,240	73	\$26,370	77.3
<b>Limestone County, TX</b>	5.17	-0.44	\$37,774	66.9	\$22,595	66.3
<b>McLennan County, TX</b>	4.5	-1.11	\$42,159	74.6	\$25,703	75.4

The following chart shows percent of total employment and earning by industry

- Educational services, and health care and social assistance employ the most individuals in Bosque County, while Information jobs provide the highest wages.



Bosque County Occupations



Glory Leasing, LLC<sup>253</sup>

- Announced a new solar farm to the Central Texas area.
- Divided evenly between McLennan and Bosque Counties, this \$130MM+ solar project is expected to generate over 161 MW.
- Construction is projected to begin Q2 2020 with completion scheduled late 2022.
- Over 430 MW of renewable energy production be added to the state electric grid, annually.

Bosque



## Falls

### Demographic Summary

- Population has been steadily declining and Texas population projections predict a decline in population in the region over the next 30 years.
- Majority of employment falls under Production, transportation, and material moving occupations and Management, business, science, and arts occupations.

### Economic Summary

- Falls County has seen an increase in the labor force from October 2019-2020 (+118) and an increase in unemployment, although the rate is lower than the Heart of Texas region and the State of Texas.
- Labor participation is very low: 49.3%<sup>254</sup> vs. 61.2% in Texas, 61.7% in U.S.<sup>255</sup>
- Highest poverty rate in the region, more than 80% of students are enrolled in free lunch programs.
- Educational services, and health care and social assistance and manufacturing employ the most individuals in Falls County, while transportation and warehousing, and utilities jobs provide the highest wages.

### Sources of economic challenge

- Post-agricultural economy with relatively low-skilled workforce and low median wage
- Highest poverty rate in the region
- Low labor force participation rate
- Low educational attainment (12% have a BA or higher, vs. 29% State of Texas)
- Decaying infrastructure
- Low educational attainment

### Needs

- Community development
- Workforce development
- Infrastructure
- Improved internet access

### Unemployment over time:<sup>256</sup>

- Population: 17,346
- UI Claimant Count: 85

### Top 5 UI Claim Industries

1. Oil and gas pipeline construction
2. School and employee bus transportation
3. Support activities for oil and gas operations
4. Employment placement agencies
5. Correctional institutions



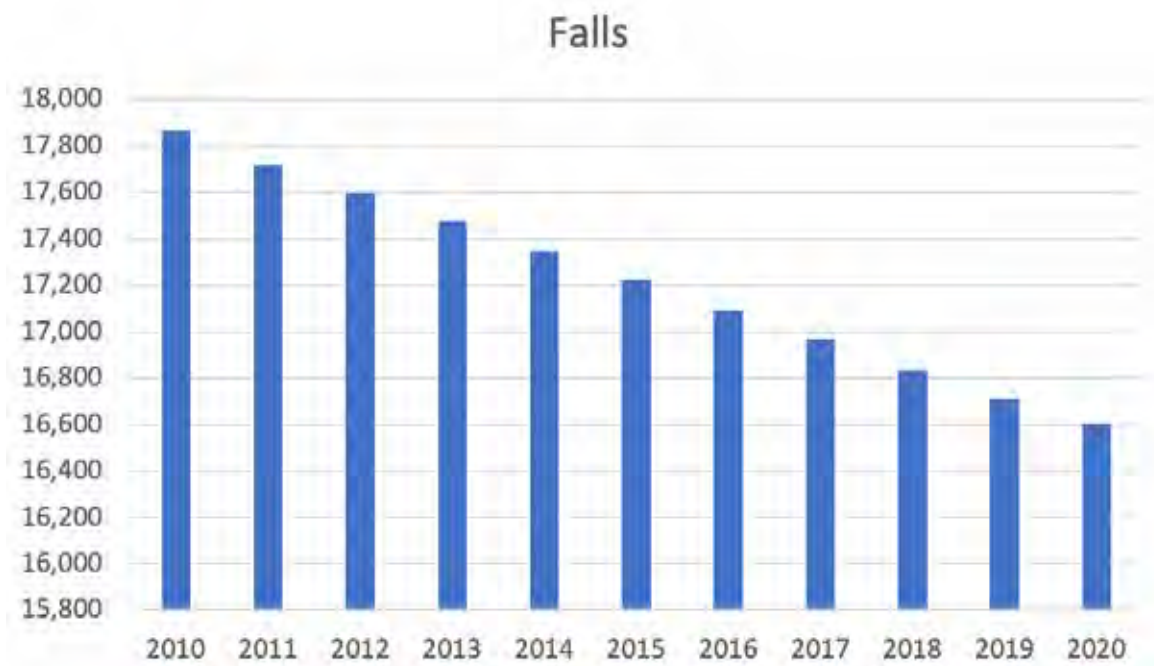
## HEART OF TEXAS CEDS

	Employment October 2020 <sup>257</sup>	Employment October 2019	Labor Force October 2020	Labor Force October 2019
Texas	13,115,800	13,663,754	14,084,000	14,160,862
Falls	6,378	6,413	6,737	6,619
Heart of Texas	159,427	161,035	168,742	166,398
	Unemployed October 2020	Unemployment October 2020	Unemployed October 2019	Unemployment October 2019
Texas	968,200	6.9	497,108	3.5
Falls	359	5.3	206	3.1
Heart of Texas	9,315	5.5%	5,399	3.2%

### Facts:

- Current Population:<sup>258</sup> 17,272 (least populous county in the region)
- Median Household Income: \$38,032 (+/- \$3,400)<sup>259</sup>
- Median Age:<sup>260</sup> 39 vs. Texas Median Age: 34.6 vs. United States Median Age: 37.9
- Percent of working-age civilians in labor force: 49.3%<sup>261</sup> (61.2% in Texas, 61.7% in U.S.)<sup>262</sup>
- Student to teacher ratio: 12.5 (or 12 to 1)<sup>263</sup>
- Percent of children under age 18 in poverty: 28.1%<sup>264</sup>
- Percent of students enrolled in free or reduced lunch: 82%<sup>265</sup>

### Population over time:<sup>266</sup>

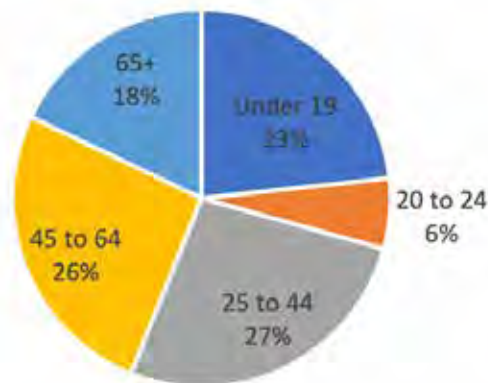




**Age Distribution**<sup>267</sup>

- Fewer than 20% of the residents are of retirement age, and the median age is slightly higher (39) than the state median age (34.6)
- 59% are of working age (20-64); on par with the region (56%), and equal to the state (59%)

Falls County

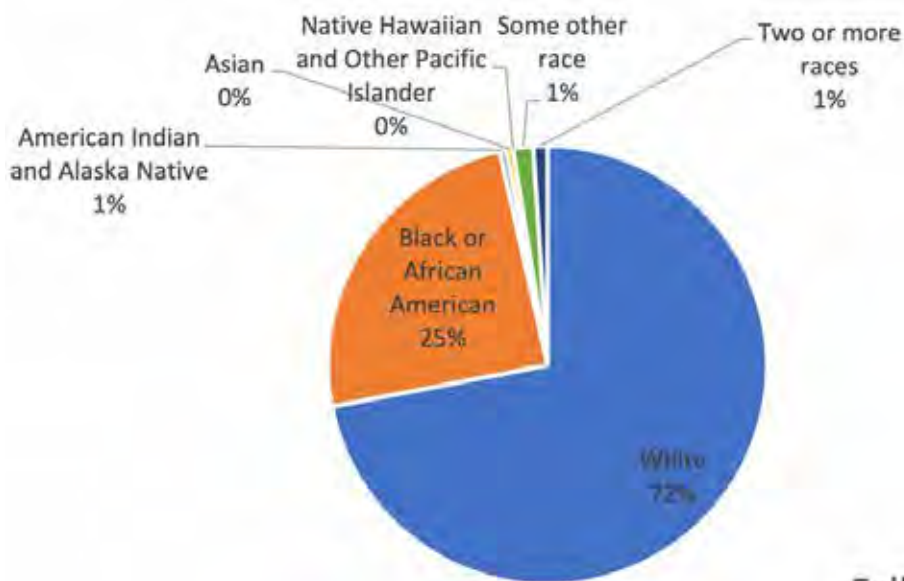


■ Under 19 ■ 20 to 24 ■ 25 to 44 ■ 45 to 64 ■ 65+

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**Race/Ethnicity Distribution**<sup>269</sup>

- Falls County has twice the percentage of Black residents compared to the Heart of Texas region and the State of Texas (25% vs. 14% vs. 12%), but is otherwise predominantly White.



Falls County

270



# HEART OF TEXAS CEDS

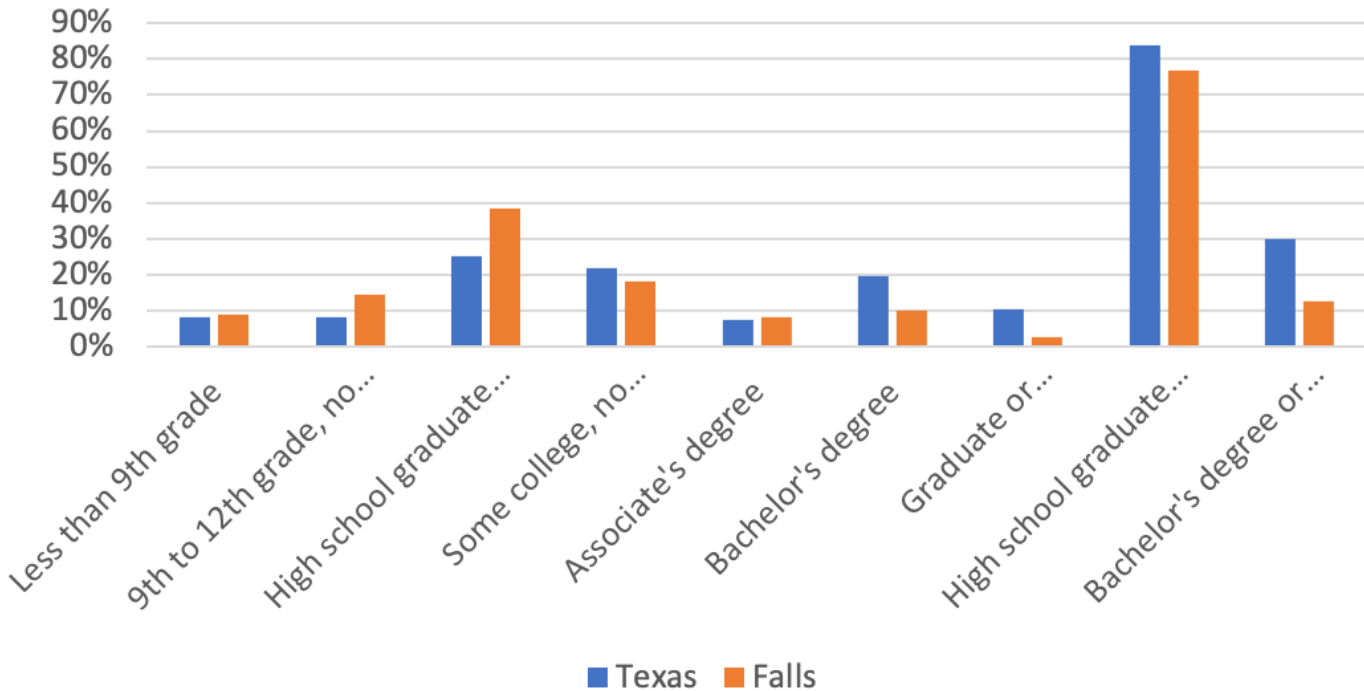
## Housing<sup>271</sup>

- More than 30% of housing in Falls County is vacant

	Texas	Bosque	Falls	Freestone
<b>HOUSING OCCUPANCY</b>				
Total housing units	10,937,026	9,767	7,781	9,495
Occupied housing units	88.60%	73.80%	66.80%	71.20%
Vacant housing units	11.40%	26.20%	33.20%	28.80%
	Hill	Limestone	McLennan	Heart of Texas
<b>HOUSING OCCUPANCY</b>				
Total housing units	16,337	10,731	101,142	155,253
Occupied housing units	79.50%	78.10%	89.00%	84.1%
Vacant housing units	20.50%	21.90%	11.00%	15.9%

Falls county has a significantly lower education level compared to the State of Texas. Education level is linked to higher skilled jobs and thus, higher wages.

## Educational Attainment



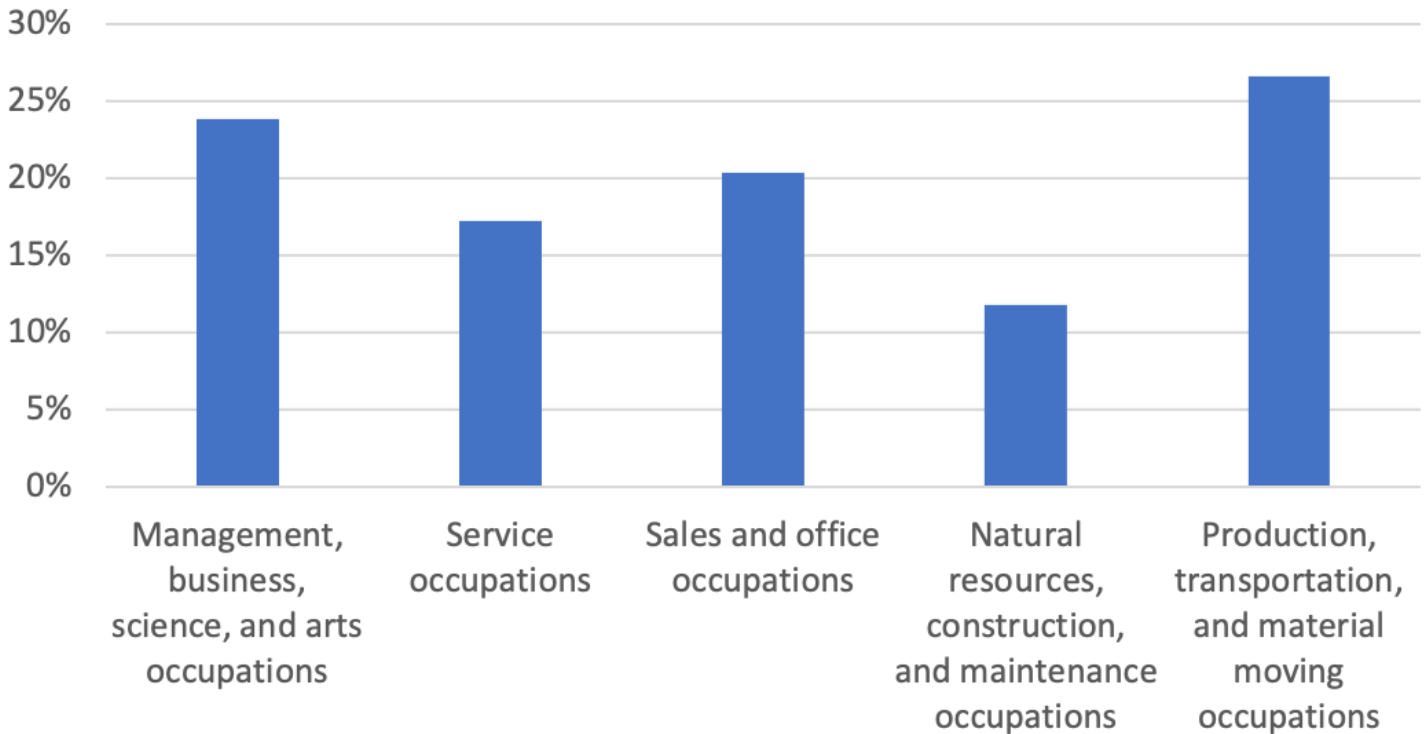
**Economic Distress Criteria:**<sup>272</sup>

- Falls county has the lowest threshold calculation for Per Capita Personal Income at 62.4%.

**Economic Distress Criteria–Geographic Components**

	24-Month Unemp	Threshold Calculation	2019 Per Personal Income (BEA)	Threshold Calculation	ACS 5-Year PCMI	Threshold Calculation
Bosque County, TX	4.31	-1.3	\$42,366	75	\$26,636	78.1
Falls County, TX	4.36	-1.25	\$35,258	62.4	\$18,745	55
Freestone County, TX	6.32	0.71	\$38,182	67.6	\$24,621	72.2
Hill County, TX	4.55	-1.06	\$41,240	73	\$26,370	77.3
Limestone County, TX	5.17	-0.44	\$37,774	66.9	\$22,595	66.3
McLennan County, TX	4.5	-1.11	\$42,159	74.6	\$25,703	75.4

**Falls County Occupations**



The following chart shows percent of total employment and earning by industry.

- Educational services, and health care and social assistance and manufacturing employ the most individuals in Falls County, while transportation and warehousing, and utilities jobs provide the highest wages.



Falls



**OCI Solar Power**<sup>273</sup>

A San Antonio-based developer is planning a 100-megawatt (MW) solar farm in Falls County. “Project Corona” will fill an 800-acre plot of land leased from private owners. It’s slated to begin construction in October with completion scheduled for November 2021.

- OCI Solar Power is planning a \$104 million solar farm in Falls County.
- 800 acres from private landowners in the reinvestment zone where it plans to build a 100-megawatt farm.
- OCI is looking for a 10-year, \$3.2 million tax abatement from the Chilton Independent School District in exchange for the \$104 million investment. Chilton ISD would receive \$573,000 — about 15% of what the company would pay.
- OCI only plans on hiring one person at an annual wage of \$48,000 once the project is operational in 2022.

**Hecate Energy LLC**<sup>274</sup>

- \$500 million, 500-megawatt solar farm in Falls County
- The project will place 1.6 million solar panels across 6,000 acres in the Mart and Riesel Independent School Districts, with most of them in the former.
- It will be among the largest solar projects nationwide.
- Construction will begin in February 2021 and wrap up in May 2022.



## Freestone

### Demographic Summary

- Population has been slightly declining, and Texas population projections predict a decline in population in the region over the next 30 years.

### Economic Summary

- Freestone County has seen a decrease in the labor force from October 2019-2020 (-160) and an increase in unemployment; this county is the only county to have a higher unemployment rate than the Heart of Texas region *and* the State of Texas.
- This county was economically stable but due to being heavily concentrated in oil and gas, Freestone County has seen a downturn with closing of major coal plant, Big Brown. Risk of a population exodus if economy does not diversify and provide jobs.
- Labor Force participation is very low; should be addressed: 39.3%<sup>275</sup> (61.2% in Texas, 61.7% in U.S.)<sup>276</sup>
- Majority of employment falls under Management, business, science, and arts occupations and Service occupations.
- Educational services, and health care and social assistance and Manufacturing employ the most individuals in Freestone County, while transportation and warehousing, and agriculture, forestry, fishing and hunting, and mining provide the highest wages, likely from Mining, quarrying, and oil and gas extraction, which will need to be replaced as this industry leaves the region.

### Sources of economic growth

- Access to 1-45 freeway expansion & US 84
- Has diversified manufacturing companies employing more than 4,500 people in the target Industry clusters.
- New acquisitions to Fairfield industrial park will replace some of the jobs lost from Big Brown Plant closure, including entry of Blackledge in March 2021.
- Robust incentives, including:
  - Land cost reductions or grants
  - Cash grants for Equipment & Infrastructure
  - Assistance with costs of infrastructure and utilities necessary to develop a property or establish the business
  - Assistance with workforce training and development through our Navarro College Career & Technical Center
  - Ad-Valorem Taxes
  - Sales Tax Grants
  - Construction Sales Tax
  - Building and Utility Connection Fees
  - Expedited and hassle free development review
  - Freeport Tax Exemption
  - Workforce Assistance
  - Small Business Focus
  - Texas Enterprise Zone Program

## Sources of Economic Challenge:

- A rapidly declining industry is leaving faster than a new industry can be introduced to the area.
- High median wage- mostly due to oil and gas jobs, which are exiting the county
- Homogeneous economy- need for diversification
- No population center

## Needs

- Entrance of a new industry, for instance, manufacturing, renewable energy, and transportation/warehousing.
- Water supply
- Improved internet access
- Airport

## Unemployment Over Time:<sup>277</sup>

- Population: 20,472
- UI Claimant Count: 101

## Top 5 UI Claim Industries

1. Oil and gas pipeline construction
2. Nursing care facilities, skilled nursing
3. Elementary and secondary schools
4. General medical and surgical hospitals
5. Limited-service restaurants

	<b>Employment October 2020<sup>278</sup></b>	<b>Employment October 2019</b>	<b>Labor Force October 2020</b>	<b>Labor Force October 2019</b>
Texas	13,115,800	13,663,754	14,084,000	14,160,862
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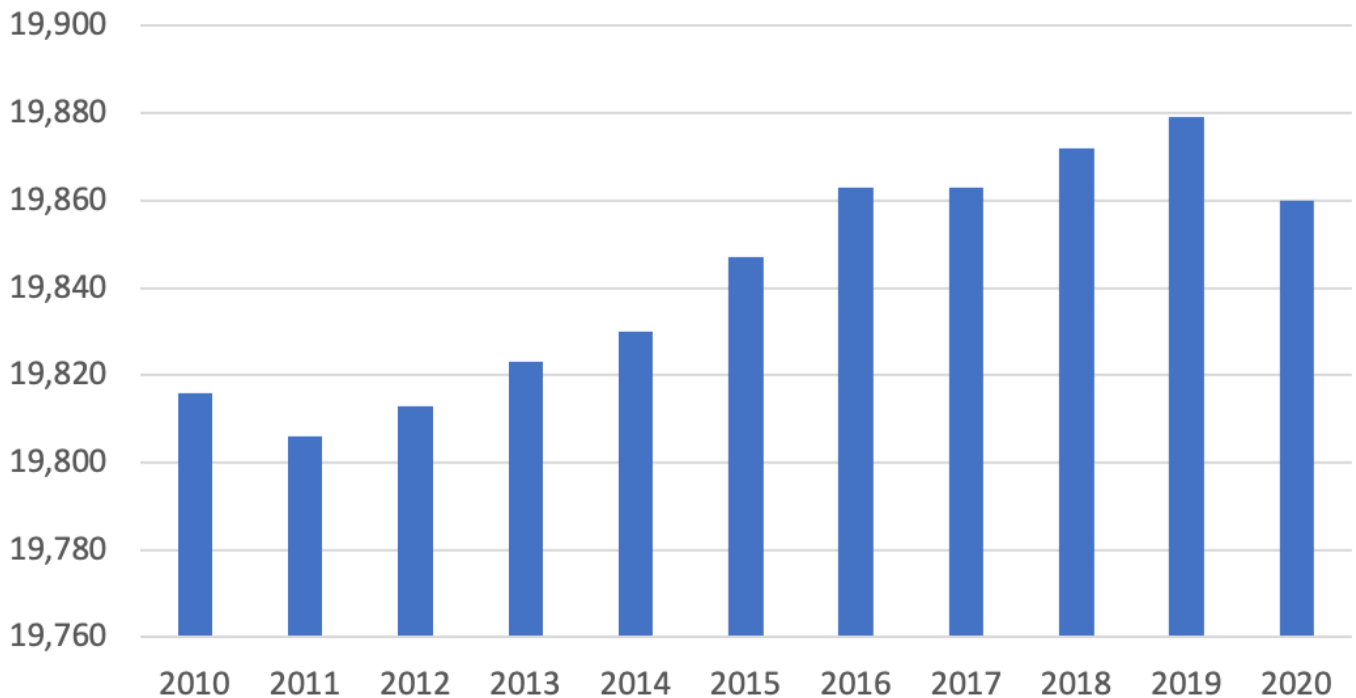
- Freestone has lost at least 350 (-40%) jobs since 2015 in the Mining, Quarrying, And Oil and Gas Extraction Industry, as a result of plants closing in the area.<sup>279</sup>
  - The entire state of Texas is losing jobs in this industry, albeit at a slower pace than Freestone, with a loss of 28,280 jobs, or -10%.
  - More than 100 indirect jobs have been lost as a result of the closure of the plants and mines.
- Nineteen of the top 25 industries in Freestone County have seen a decline in jobs numbers, six of which are jobs related to the Oil and Gas Industries.<sup>280</sup>

**Facts:**

- Current Population:<sup>281</sup> 19,714 (4th most populous county in the region)
- Median Household Income: \$48,731 (+/- \$5,100)<sup>282</sup>
- Median Age: 41.5 vs. Texas Median Age: 34.6 vs. United States Median Age: 37.9
- Percent of working-age civilians in labor force: 39.3%<sup>283</sup> (61.2% in Texas, 61.7% in U.S.)<sup>284</sup>
- Student to teacher ratio: 12.4 (or 12 to 1)<sup>285</sup>
- Percent of children under age 18 in poverty: 19.5%<sup>286</sup>
- Percent of students enrolled in free or reduced lunch: 54%<sup>287</sup>

**Population over time:<sup>288</sup>**

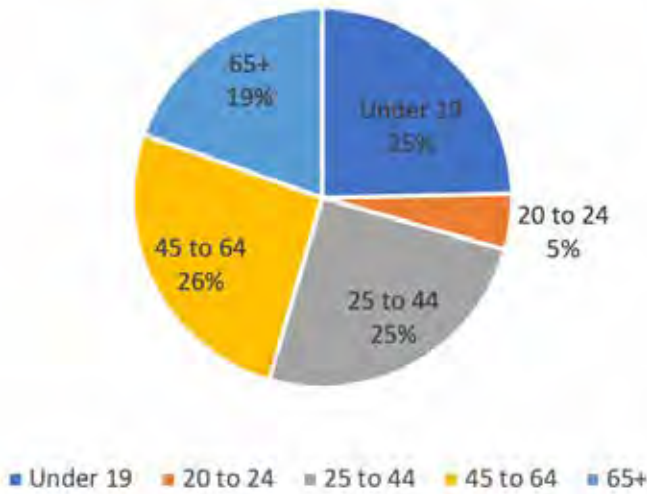
Freestone



**Age Distribution**<sup>289</sup>

- Fewer than 20% of the residents are of retirement age, and the median age is higher (41.5) than the state median age (34.6).
- 56% are of working age (20-64); equal with the region (56%), and on par the state (59%).

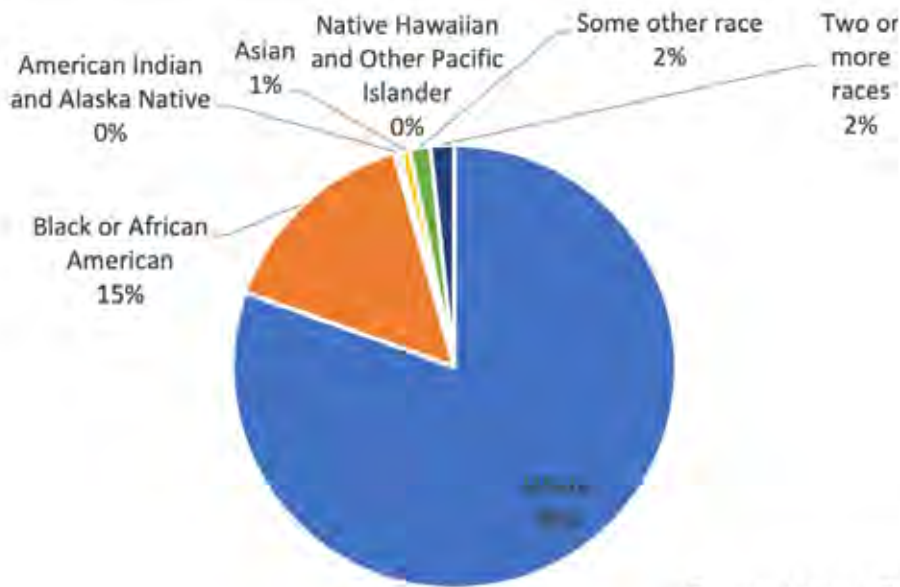
Freestone County



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**Race/Ethnicity Distribution**

- Freestone County is predominantly White, and its demographics are on par with the region.



Freestone County

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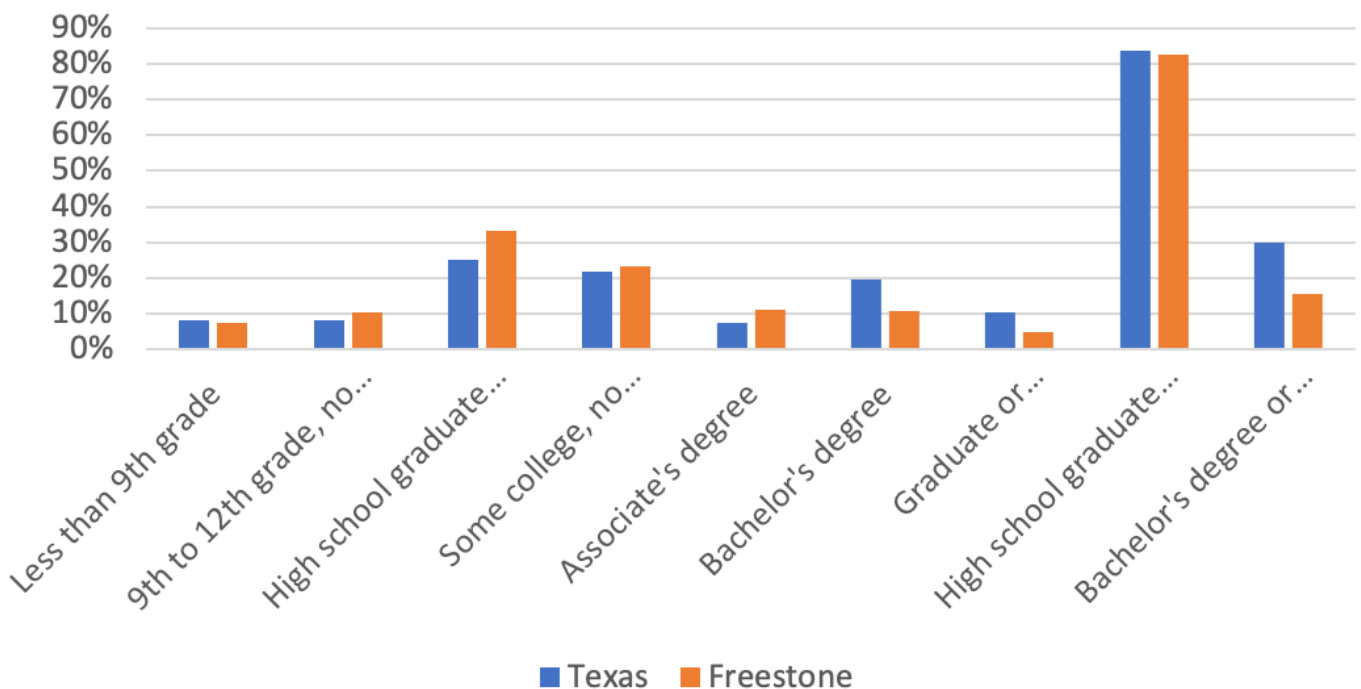
**Housing**<sup>292</sup>

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### Educational Attainment



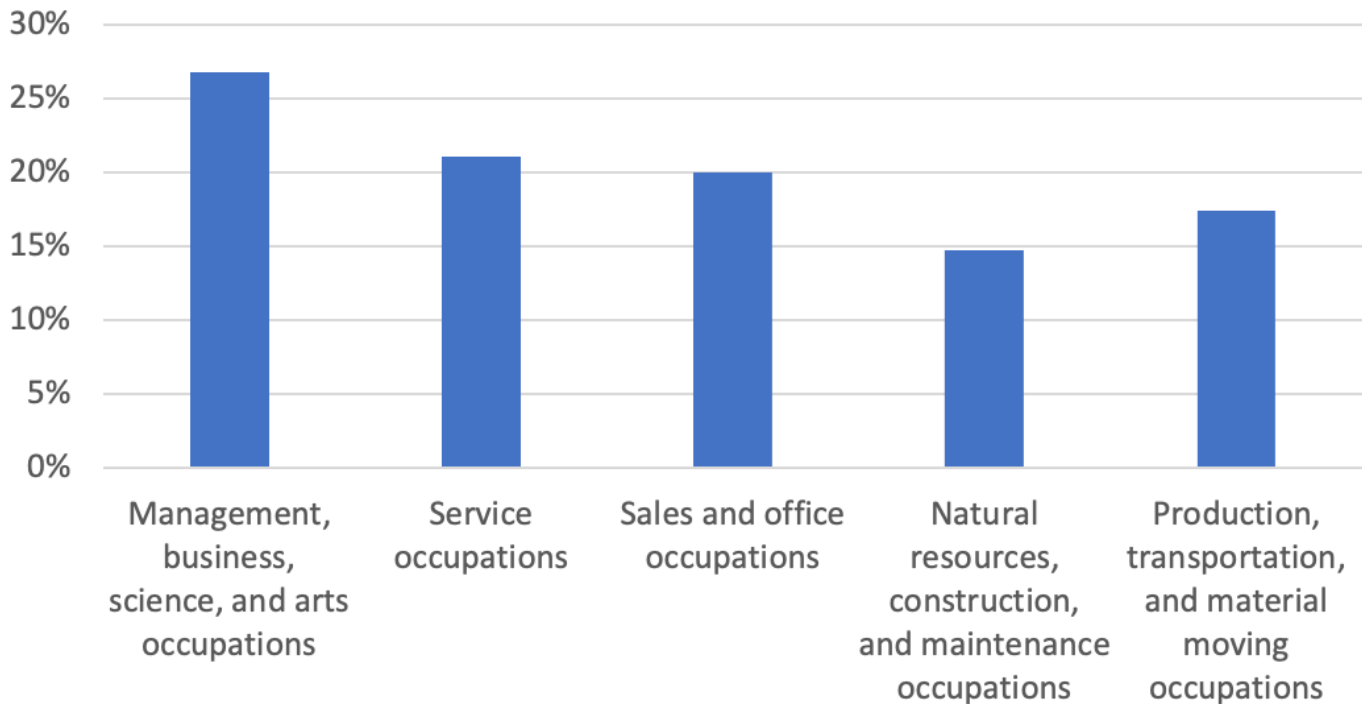
## Economic Distress Criteria:<sup>293</sup>

- Freestone county has the lowest threshold calculation for Per Capita Personal Income at 67.6%.

## Economic Distress Criteria–Geographic Components

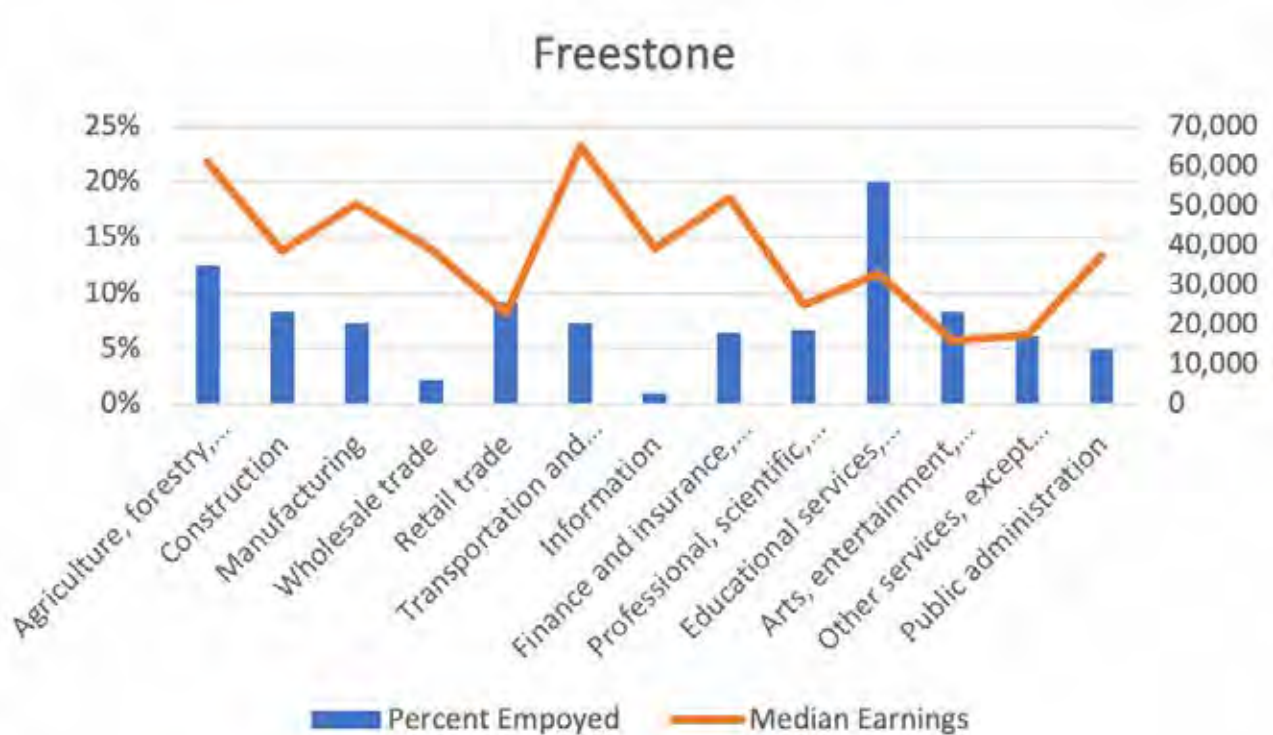
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## Freestone County Occupations



The following chart shows percent of total employment and earning by industry.

- Educational services, and health care and social assistance and Manufacturing employ the most individuals in Freestone County, while transportation and warehousing, and Agriculture, forestry, fishing and hunting, and mining provide the highest wages, likely from Mining, quarrying, and oil and gas extraction, which will need to be replaced as this industry leaves the region.



**Threats:**

Closure of Big Brown Plant in 2018 displacing about 200 workers, however, the Fairfield industrial park will replace some of those jobs.<sup>294</sup>

- Luminant Generation Co. LLC, Texas’ largest power generator, shut down three coal plants in the state in 2018—including the two-unit Big Brown Power Plant in Freestone County, east of Waco. The ensuing result was a loss of 200 jobs and better air quality in the region.<sup>295</sup>
- Luminant was on the hook to repair the damaged land, to restore it, at a cost of some \$1 billion. But there was a problem: Luminant’s parent company, Energy Future Holdings, went bankrupt.<sup>296</sup>
- State data shows that the closure of three coal-burning power plants in late 2017 kept more than 150,000 tons of dangerous, smog-forming air pollutants from entering the atmosphere in the following year.<sup>297</sup>
- Renewable energy is becoming more widespread and efficient. Today, wind power accounts for 17 percent of Texas’ electric grid capacity.<sup>298</sup>
- “Working in a power plant is pretty specialized, and those skills will be hard to transfer to another career.”
- Manitou Group leaving the area in March 2021, losing 148 jobs.<sup>299</sup>
  - The Manitou Group (articulated loaders production) will cease operations in Waco, Texas, at the end of March 2021 and consolidate most of the production in South Dakota, while assisting 148 employees with job searches.



### Opportunities:

Built out Old Mexia-Fairfield Road to increase access to major cities and access to an industrial park with room to grow:

- **Fairfield Industrial Park North**<sup>300</sup> is home to 45 acres of quality developed land.
- **Fairfield Industrial Park South**<sup>301</sup> is now complete and available with 125 acres of shovel ready sites for business development.
- **300 acres remaining for industrial development.**<sup>302</sup>

**Fairfield Industrial Park North**<sup>303</sup> is home to 45 acres of quality developed land with the best infrastructure and location that a business could ever want. Located just off Interstate 45 in Fairfield, Texas, our “45 on 45 “ is home to industry leading companies such as Norwesco manufacturer of proprietary rotationally molded polyethylene tanks for agricultural, water, closed-top industrial and below ground septic and cistern applications), Archrock (natural gas contract compression services), Custom Hose (hydraulic hoses, hydraulic equipment & supplies, air & water hoses, pressure relief valves, oil field equipment & supply and industrial plumbing supplies), Baker Hughes (provider of integrated oilfield products, services and digital solutions), Windstream Communications (network communications and technology solutions) and Chris Christensen Systems (Professional Grooming Products and Tools for dogs).

#### **Fairfield Industrial Park South:**

Fairfield Industrial Park South<sup>304</sup> is now complete and available with 125 acres of shovel ready sites for business development. The new park is located just one-half mile off Interstate 45 allowing for excellent truck transportation access to the site.

#### Expansion of Old Mexia-Fairfield road

- Built out Old Mexia-Fairfield road for increased commercial and industrial traffic, providing a roadway facility that can support truck traffic, and improve access to and from Interstate 45, which is a vital infrastructure route between Houston and Dallas.
- Blacklidge will set up a production site in the park, hiring 12 full-time positions.
- Mustang Oilfield Services, LLC, and oil field swabbing services and diesel repair company with 20 employees,
- Energy Transfer Company, founded in 2002 and will utilize the reconstruction portion of the road and is engaged in transportation and storage of natural gas at the Reed Compressor Station located at the end of the Old Mexia-Fairfield road with 12 employees and
- Morrison Lawn Service M & W Waste Management, LLC has been operating for over 20 years at the end of the Old Mexia-Fairfield road with 10 employees.

## Diversified Manufacturing:

Freestone has diversified manufacturing companies employing more than 4,500 people in the target Industry clusters:<sup>305</sup>

- Fabricated Metal Product Manufacturing/Precision Metalworking
  - 23 Business Locations and 474 Industry Jobs
- Warehousing/Distribution/E-Commerce
  - 87 Business Locations and 2,874 Industry Jobs
- Plastic Product/Rubber Product Manufacturing
  - 9 Business Locations and 711 Industry Jobs
- Paper/Packaging Product Manufacturing
  - 2 Business Locations and 521 Industry Jobs

## Local Incentives<sup>306</sup>

The Fairfield EDC (FEDC) is Fairfield's lead agency for coordinating economic assistance and incentive agreements for the business community seeking to expand or relocate operations to Fairfield. Incentives are available from both the FEDC and the City of Fairfield as noted below.

### Fairfield EDC Incentives

The Fairfield EDC is funded by one half of 1% sales tax approved by the citizens of Fairfield and this is the primary source for FEDC incentives. The FEDC has a proven record of providing incentives to facilitate the location or expansion of businesses in the City.

To qualify for incentive funding through the Fairfield EDC, a thorough review of a company's business plan and financial information will be conducted.

The amount of incentive funds, if any, are granted on a case-by-case basis based on the merits of the project, including number, type and average wage of primary jobs. Additional consideration will be taken for sales tax revenue and ad valorem tax value. Following are incentives available from the FEDC:

- Land: Land cost reductions or grants
  - Equipment Grants: Cash grants for Equipment & Infrastructure
  - Infrastructure: Assistance with costs of infrastructure and utilities necessary to develop a property.
  - Workforce Assistance: Assistance with workforce training and development through our Navarro College Career & Technical Center.

### City of Fairfield Incentives

The City stands ready to partner with the FEDC to provide a desirable business with incentives necessary to commit to a Fairfield location.

- **Ad-Valorem Taxes:** Utilizing a Tax Abatement or Chapter 380 Performance Agreement, the City may reduce or grant back to the business a portion of their real property taxes paid.
- **Sales Tax Grants:** Grant back to the business a portion of the sales taxes generated at the business.
- **Infrastructure Participation:** Participate in the cost of public infrastructure necessary to establish the business.
- **Construction Sales Tax:** Provide a grant for a portion of the sales tax paid to local merchants for building materials supporting new construction or business expansion.
- **TIF / TIRZ:** Establishment of strategic locations for Tax Increment Financing (TIF) within Tax Increment Reinvestment Zones (TIRZ).
- **Building and Utility Connection Fees:** Provide a partial reduction in these fees for certain developments.
- **Development Review:** Commitment to an expedited process for development of business in the City. Support a hassle-free environment with expert plan reviews and responsive comments to prospective developers and businesses.
- **Freeport Tax Exemption:** Certain businesses may apply for an exemption from personal property tax on Freeport and Goods-in-Transit inventory.
- **Workforce Assistance:** Partner with the business and other allies to provide workforce recruiting, development and training, potentially assisted by the State's Skills Development Fund.
- **Small Business Focus:** A commitment to provide an environment encouraging the development of new and expansion of existing small businesses.
- **Texas Enterprise Zone Program:** Partner with the State of Texas to promote job creation and capital investment in economically distressed areas of the City.

## Hill

### Demographic Summary

- Texas population projections predict a decline in population in the region over the next 30 years.

### Economic Summary

- Hill County has seen a decrease in the labor force from October 2019-2020 (-91) and an increase in unemployment; the unemployment rate is on par with the Heart of Texas region and lower than the State of Texas.
- Majority of employment falls under Management, business, science, and arts occupations and Sales and office occupations.
- Educational services, and health care and social assistance, Retail Trade, and Manufacturing employ the most individuals in Hill County, while information and Transportation and warehousing jobs provide the highest wages.

### Sources of Economic Growth

- Sizeable city: Hillsboro with industrial & retail sectors
- Tourism & weekend home economies from lakes
- Proximity to DFW Metroplex
- Good infrastructure
- Adequate water supply

### Sources of Economic Challenge

- Post-agricultural economy with relatively low-skilled workforce and low median wage

### Needs

- Workforce development
- Community development
- Economic analysis
- Catalyst projects
- Improved internet access

### Unemployment Over Time:<sup>307</sup>

- Population: 36,532
- UI Claimant Count: 190

### Top 5 UI Claim Industries

1. Nursing care facilities, skilled nursing
2. Food service contractors
3. Oil and gas pipeline construction
4. Highway, street, and bridge construction
5. School and employee bus transportation



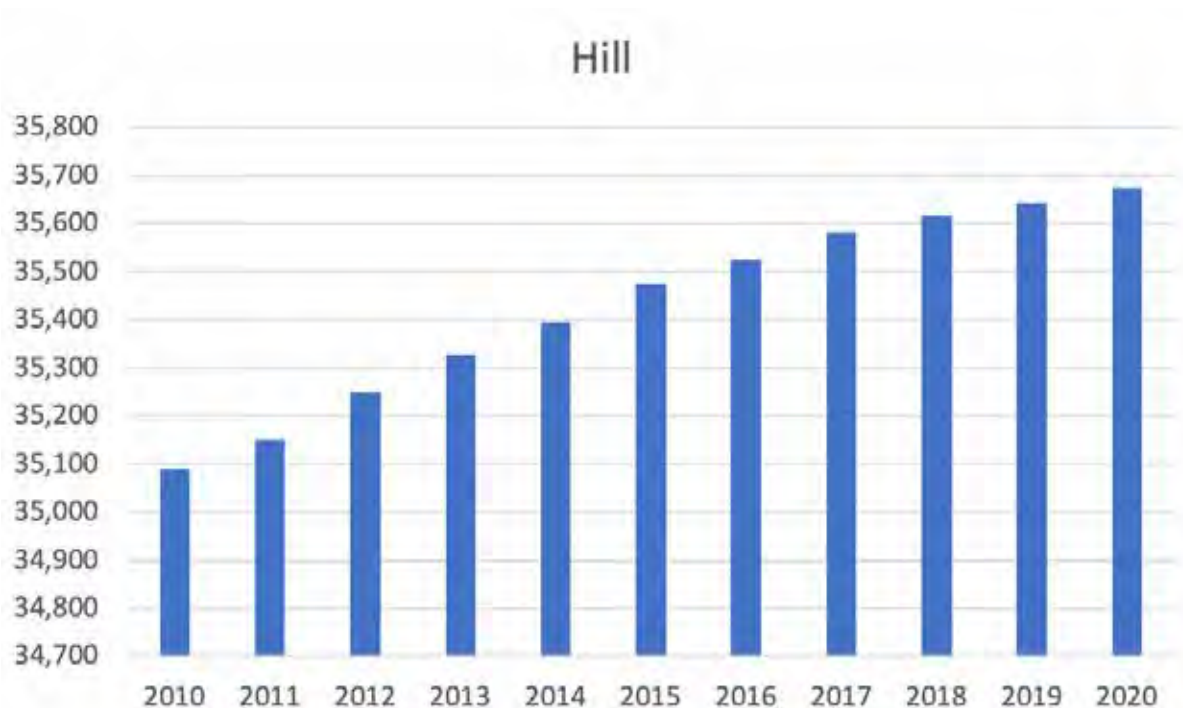
## HEART OF TEXAS CEDS

	Employment October 2020 <sup>308</sup>	Employment October 2019	Labor Force October 2020	Labor Force October 2019
Texas	13,115,800	13,663,754	14,084,000	14,160,862
Falls	6,378	6,413	6,737	6,619
Heart of Texas	159,427	161,035	168,742	166,398
	Unemployed October 2020	Unemployment October 2020	Unemployed October 2019	Unemployment October 2019
Texas	968,200	6.9	497,108	3.5
Falls	359	5.3	206	3.1
Heart of Texas	9,315	5.5%	5,399	3.2%

### Facts:

- Current Population:<sup>309</sup> 35,689 (2nd most populous county in the region)
- Median Household Income: \$48,823 (+/- \$2,959)<sup>310</sup>
- Median Age: 42.1 vs. Texas Median Age: 34.6 vs. United States Median Age: 37.9
- Percent of working-age civilians in labor force: 58.6%<sup>311</sup> (61.2% in Texas, 61.7% in U.S.)<sup>312</sup>
- Student to teacher ratio: 12.6 (or 12 to 1)<sup>313</sup>
- Percent of children under age 18 in poverty: 18.1%<sup>314</sup>
- Percent of students enrolled in free or reduced lunch: 63%<sup>315</sup>

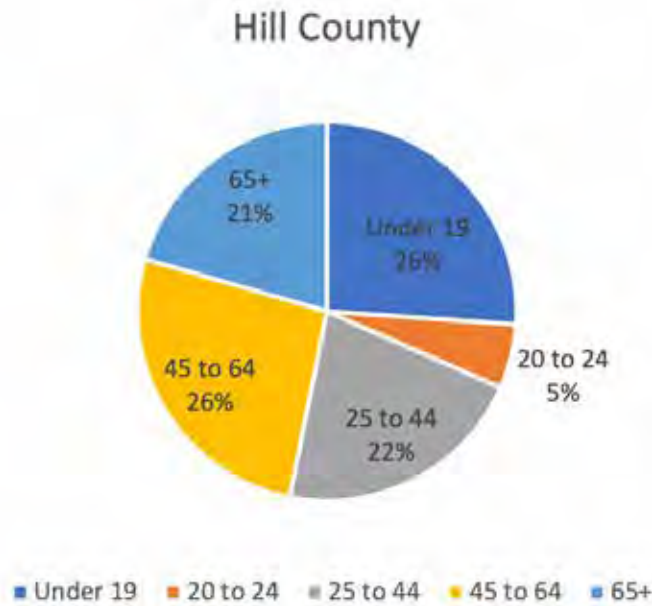
### Population over time:<sup>316</sup>





**Age Distribution**<sup>317</sup>

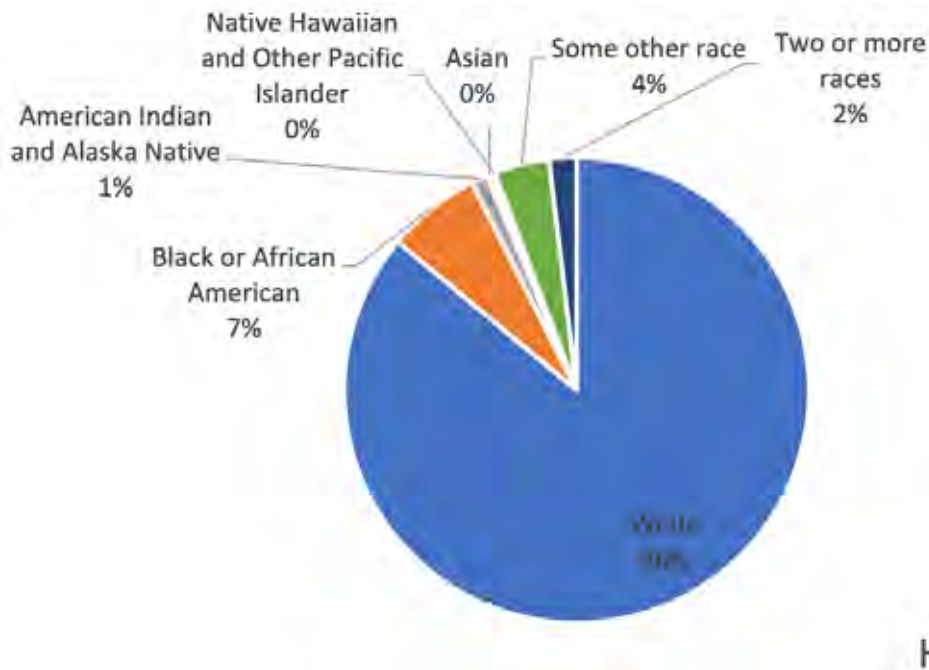
- More than 20% of the residents are of retirement age, and the median age is higher (42.1) than the state median age (34.6).
- 53% are of working age (20-64); slightly lower than the region (56%), and the state (59%).



318

**Race/Ethnicity Distribution**<sup>319</sup>

- Hill County is predominantly White with little diversity.



# HEART OF TEXAS CEDS

## Housing<sup>320</sup>

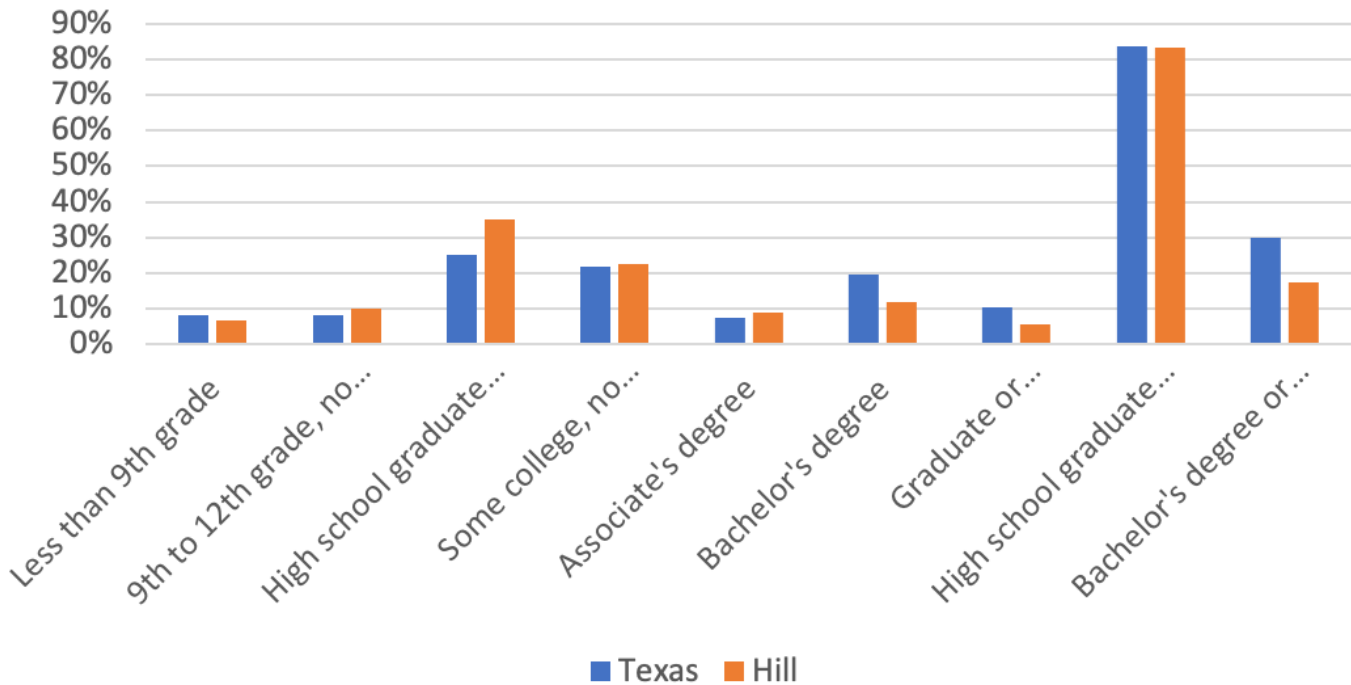
- Just about 20% of housing in Hill County is vacant

Texas Bosque Falls Freestone Hill Limestone McLennan Heart of Texas

	Texas	Bosque	Falls	Freestone
<b>HOUSING OCCUPANCY</b>				
Total housing units	10,937,026	9,767	7,781	9,495
Occupied housing units	88.60%	73.80%	66.80%	71.20%
Vacant housing units	11.40%	26.20%	33.20%	28.80%
	Hill	Limestone	McLennan	Heart of Texas
<b>HOUSING OCCUPANCY</b>				
Total housing units	16,337	10,731	101,142	155,253
Occupied housing units	79.50%	78.10%	89.00%	84.1%
Vacant housing units	20.50%	21.90%	11.00%	15.9%

Hill county has a lower education level compared to the State of Texas. Education level is linked to higher skilled jobs and thus, higher wages.

## Educational Attainment

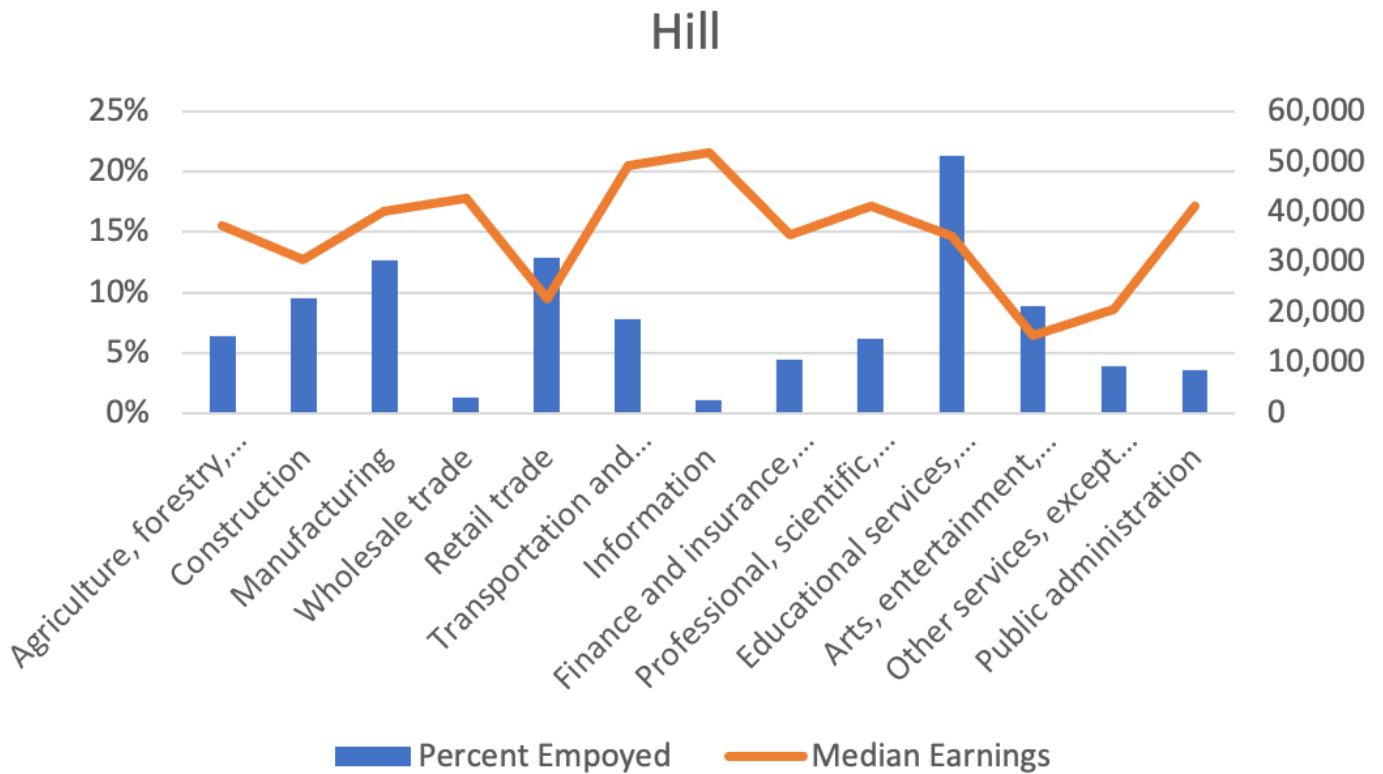


**Economic Distress Criteria:**<sup>321</sup>

- Hill county has the third highest threshold calculation for Per Capita Personal Income at 73%.

**Economic Distress Criteria–Geographic Components**

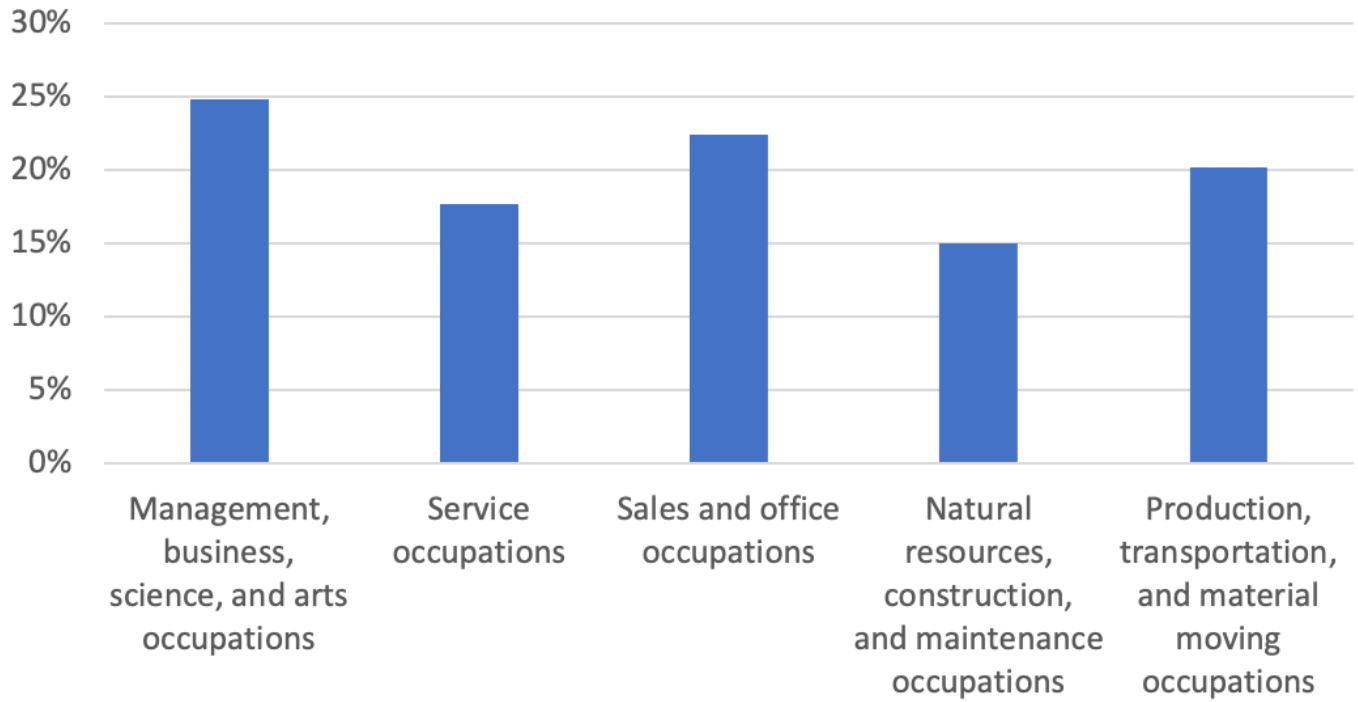
	24-Month Unemp	Threshold Calculation	2019 Per Personal Income (BEA)	Threshold Calculation	ACS 5-Year PCMI	Threshold Calculation
Bosque County, TX	4.31	-1.3	\$42,366	75	\$26,636	78.1
Falls County, TX	4.36	-1.25	\$35,258	62.4	\$18,745	55
Freestone County, TX	6.32	0.71	\$38,182	67.6	\$24,621	72.2
Hill County, TX	4.55	-1.06	\$41,240	73	\$26,370	77.3
Limestone County, TX	5.17	-0.44	\$37,774	66.9	\$22,595	66.3
McLennan County, TX	4.5	-1.11	\$42,159	74.6	\$25,703	75.4



The following chart shows percent of total employment and earning by industry

- Educational services, and health care and social assistance, Retail Trade, and Manufacturing employ the most individuals in Hill County, while information and Transportation and warehousing jobs provide the highest wages.

## Hill County Occupations



## Limestone

### Demographic Summary

- Population has declined in the past decade; Texas population projections predict a decline in population in the region over the next 30 years.

### Economic Summary

- Limestone County has seen an increase in the labor force from October 2019-2020 (+36) and an increase in unemployment; the unemployment rate is higher than the Heart of Texas region and on par with the State of Texas.
- Labor Force Participation is low: 45.9%<sup>322</sup> (61.2% in Texas, 61.7% in U.S.)<sup>323</sup>
- High poverty rate
- Majority of employment falls under Management, business, science, and arts occupations and Sales and office occupations.
- Educational services, and health care and social assistance employ the most individuals in Limestone County, while Agriculture, forestry, fishing and hunting, and mining provide the highest wages, likely from Mining, quarrying, and oil and gas extraction, which will need to be replaced as this industry leaves the region.

### Sources of economic growth

- Proximity to DFW Metroplex
- Sizeable city: Mexia with industrial & retail sector
- Tourism & weekend home economies from lakes
- Good infrastructure
- Adequate water supply

### Sources of economic challenge

- Post-agricultural economy with relatively low-skilled workforce & low median wage



## Needs

- Workforce development
- Community development
- Economic analysis
- Catalyst projects
- Improved internet access

## Unemployment Over Time:<sup>324</sup>

- Population: 23,725
- UI Claimant Count: 90

## Top 5 UI Claim Industries

1. Other heavy construction
2. Warehouse Clubs and Supercenters
3. Highway, street, and bridge construction
4. Residential site preparation contractors
5. New car dealers

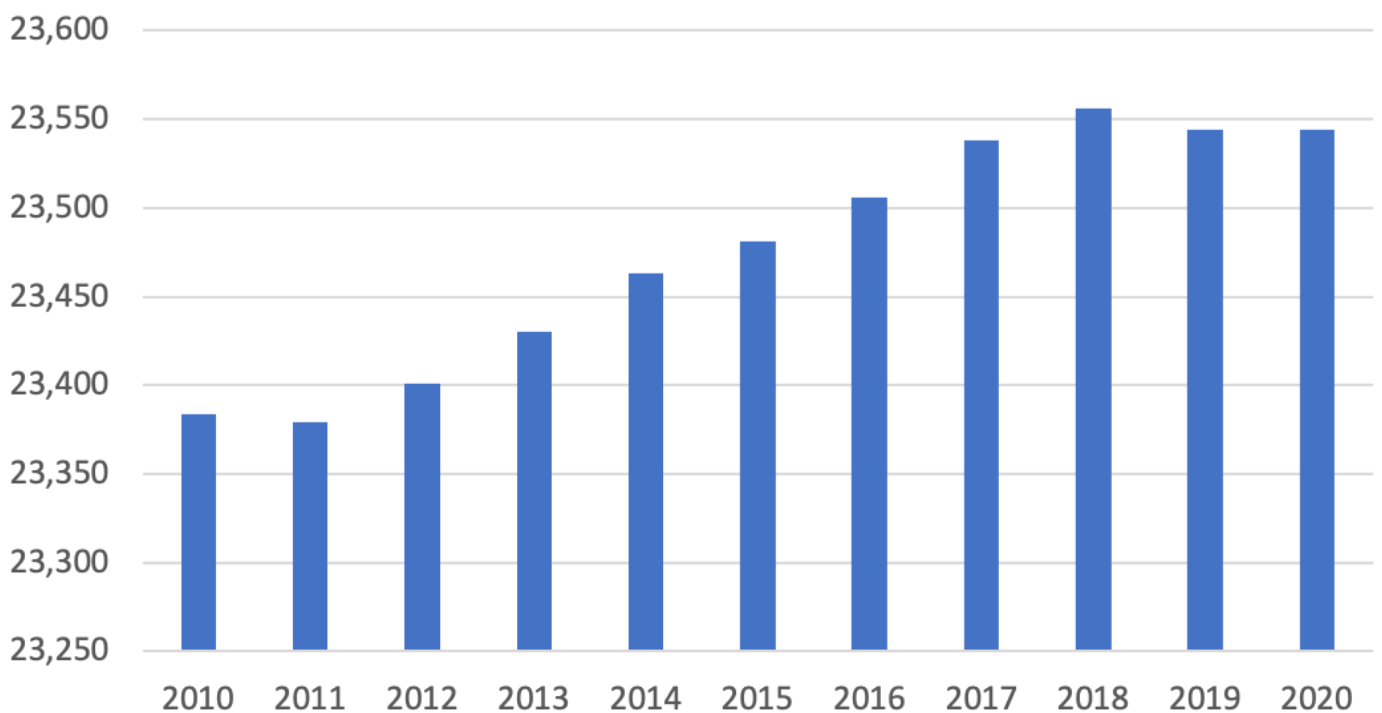
	<b>Employment October 2020<sup>325</sup></b>	<b>Employment October 2019</b>	<b>Labor Force October 2020</b>	<b>Labor Force October 2019</b>
Texas	13,115,800	13,663,754	14,084,000	14,160,862
Falls	6,378	6,413	6,737	6,619
Heart of Texas	159,427	161,035	168,742	166,398
	<b>Unemployed October 2020</b>	<b>Unemployment October 2020</b>	<b>Unemployed October 2019</b>	<b>Unemployment October 2019</b>
Texas	968,200	6.9	497,108	3.5
Falls	359	5.3	206	3.1
Heart of Texas	9,315	5.5%	5,399	3.2%

**Facts:**

- Current Population:<sup>326</sup> 23,417 (3rd most populous county in the region)
- Median Household Income: \$42,680 (+/- \$4,009)<sup>327</sup>
- Median Age: 39.9 vs. Texas Median Age: 34.6 vs. United States Median Age: 37.9
- Percent of working-age civilians in labor force: 45.9%<sup>328</sup> (61.2% in Texas, 61.7% in U.S.)<sup>329</sup>
- Student to teacher ratio: 13 (or 13 to 1)<sup>330</sup>
- Percent of children under age 18 in poverty: 26%<sup>331</sup>
- Percent of students enrolled in free or reduced lunch: 75%<sup>332</sup>

**Population Over Time:**<sup>333</sup>

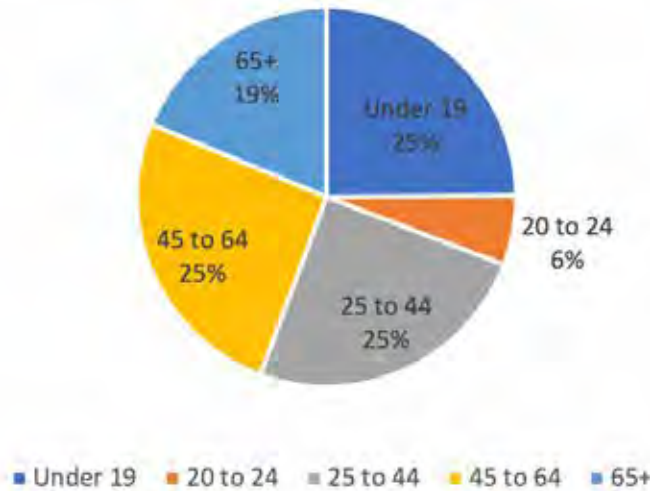
Limestone



**Age Distribution**<sup>334</sup>

- Just about 20% of the residents are of retirement age, and the median age is higher (39.9) than the state median age (34.6).
- 56% are of working age (20-64); on par with the region (56%), and slightly lower than the state (59%).

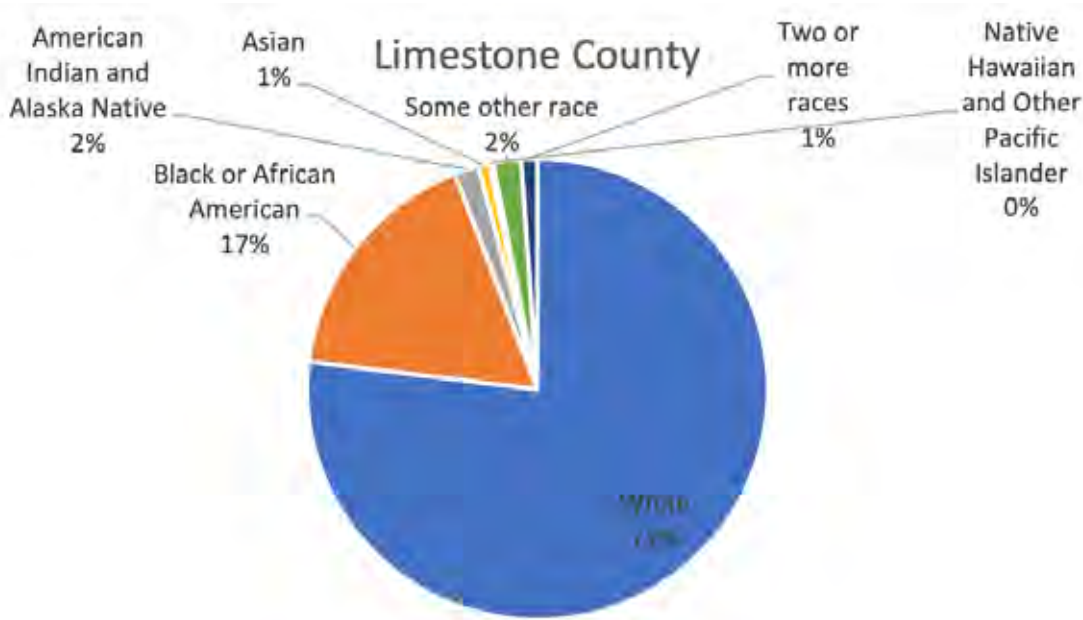
Limestone County



335

**Race/ethnicity distribution**

- Limestone County is predominantly White, and its demographics are on par with the region.





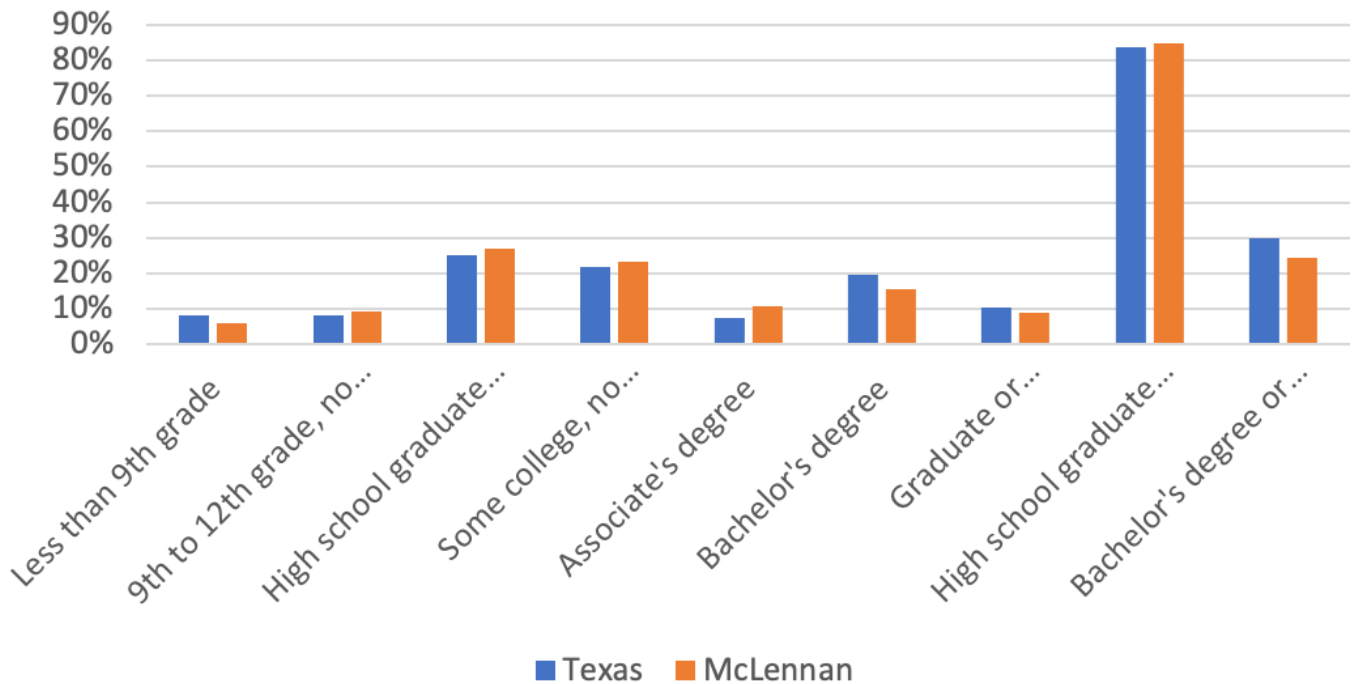
**Housing**<sup>336</sup>

- More than 20% of housing in Limestone County is vacant.

	Texas	Bosque	Falls	Freestone
<b>HOUSING OCCUPANCY</b>				
Total housing units	10,937,026	9,767	7,781	9,495
Occupied housing units	88.60%	73.80%	66.80%	71.20%
Vacant housing units	11.40%	26.20%	33.20%	28.80%
	Hill	Limestone	McLennan	Heart of Texas
<b>HOUSING OCCUPANCY</b>				
Total housing units	16,337	10,731	101,142	155,253
Occupied housing units	79.50%	78.10%	89.00%	84.1%
Vacant housing units	20.50%	21.90%	11.00%	15.9%

Limestone county has a lower education level compared to the State of Texas. Education level is linked to higher skilled jobs and thus, higher wages.

### Educational Attainment



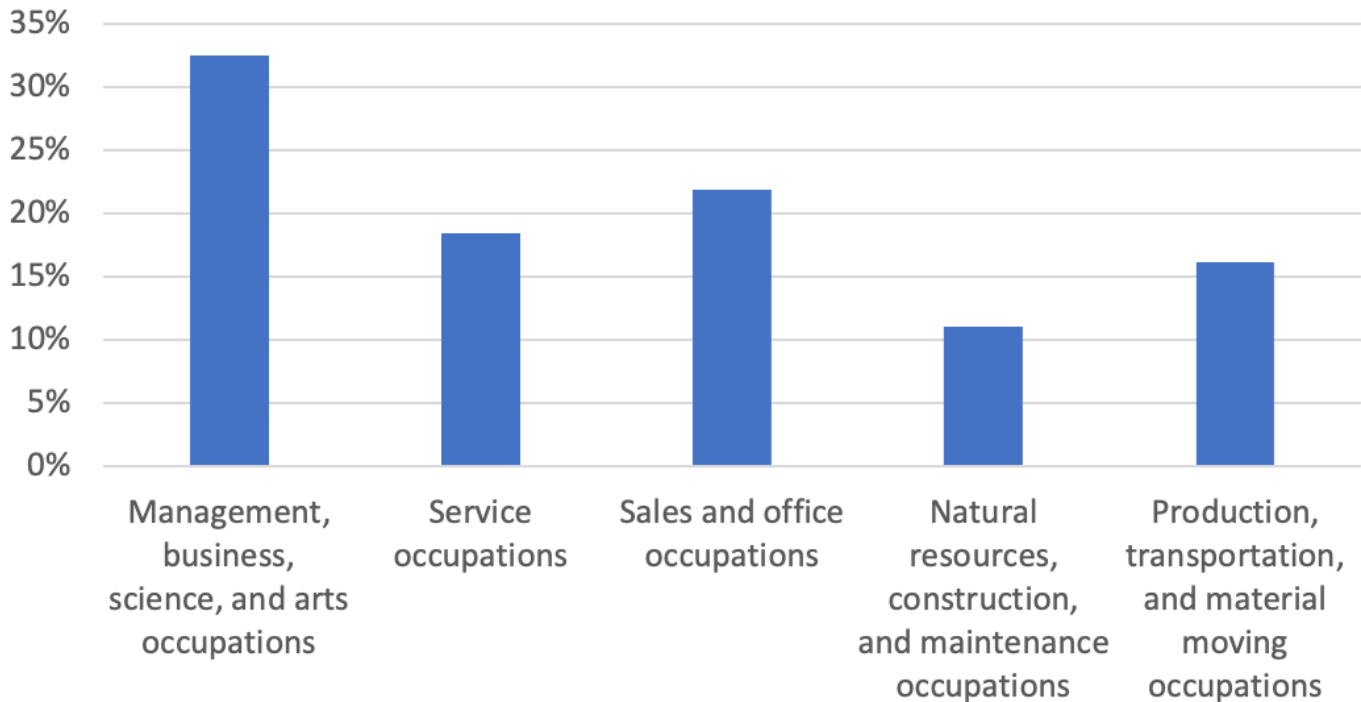
## Economic Distress Criteria:<sup>337</sup>

- Limestone county has the second lowest threshold calculation for Per Capita Personal Income at 66.9%

## Economic Distress Criteria–Geographic Components

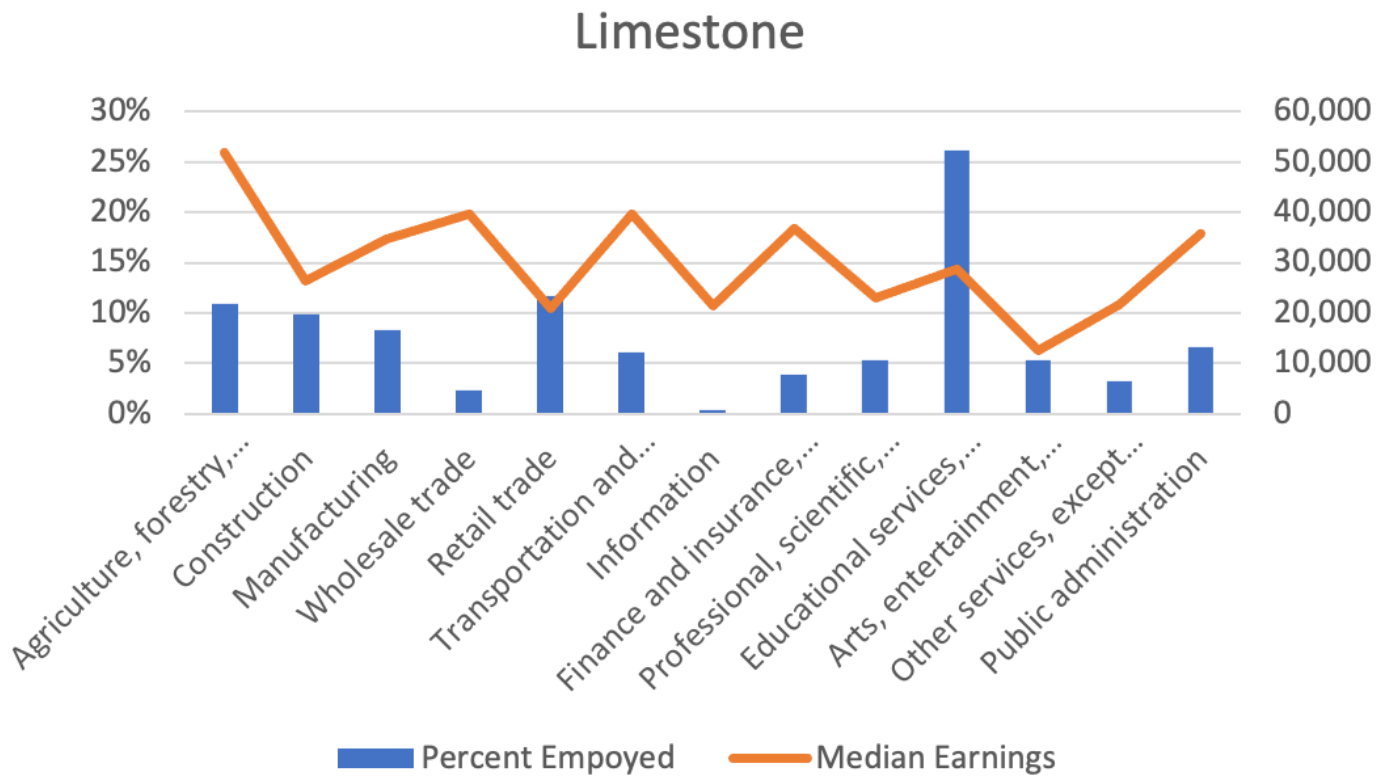
	24-Month Unemp	Threshold Calculation	2019 Per Personal Income (BEA)	Threshold Calculation	ACS 5-Year PCMI	Threshold Calculation
<b>Bosque County, TX</b>	4.31	-1.3	\$42,366	75	\$26,636	78.1
<b>Falls County, TX</b>	4.36	-1.25	\$35,258	62.4	\$18,745	55
<b>Freestone County, TX</b>	6.32	0.71	\$38,182	67.6	\$24,621	72.2
<b>Hill County, TX</b>	4.55	-1.06	\$41,240	73	\$26,370	77.3
<b>Limestone County, TX</b>	5.17	-0.44	\$37,774	66.9	\$22,595	66.3
<b>McLennan County, TX</b>	4.5	-1.11	\$42,159	74.6	\$25,703	75.4

## McLennan County Occupations



The following chart shows percent of total employment and earning by industry

- Educational services, and health care and social assistance employ the most individuals in Limestone County, while Agriculture, forestry, fishing and hunting, and mining provide the highest wages, likely from Mining, quarrying, and oil and gas extraction, which will need to be replaced as this industry leaves the region.



### **Mart Texas in Limestone and McLennan Counties**<sup>339</sup>

In 2019, Engie began building a new wind farm providing not only power to the grid, but also dollars for the school district and jobs for the area.

- The capacity to generate 300 megawatts of electricity
- Can power 200 homes during peak periods, so using that formula the farm could light up about 60,000 homes.
- The \$330 million project scattered 100 wind turbines across McLennan and Limestone counties that not only will generate electricity but also tax revenue for the local school district.
- 35,000 acres of land that are under long-term lease, primarily agricultural land with low-density residences; compatible with the operation of a wind energy project.
- Engie has at least two major clients, including Walmart, which have agreed to purchase almost half the power the turbines near Mart will generate.
- Winds there average about 7 meters per second at a height of 80 meters, according to a U.S. Department of Energy map.<sup>340</sup>

### **Prairie Hill Wind Farm project**<sup>341</sup>

- One hundred new wind turbines will be spread across McLennan County and Limestone County as part of the Prairie Hill Wind Farm project.
- This project is a \$30 million investment in McLennan County, part of a larger \$300+ million wind turbine installation investment for the region.
- Upon completion, the turbines will generate approximately 250 to 300 megawatts of energy annually.

## McLennan

### Demographic Summary

- This is the only county in the region projected to see population growth in the next 30 years.
- McLennan county has a lower education level compared to the State of Texas; however, it has the highest percentage of population with a bachelor's degree or higher, indicating that perhaps graduates from Baylor University may remain in the region. Education level is linked to higher skilled jobs and thus, higher wages, and therefore, McLennan county should try to convince Baylor graduates to remain in the area.

### Economic Summary

- McLennan County has seen the largest increase in the labor force from October 2019-2020 (+2,555) and an increase in unemployment; the unemployment rate is lower than the Heart of Texas region and the State of Texas.
- Majority of employment falls under Management, business, science, and arts occupations and Sales and office occupations.
- Educational services, and health care and social assistance employ the most individuals in McLennan County, followed by Retail Trade and Manufacturing while Public Administration provides the highest wages.
- Introduction of retail and entertainment centers will provide jobs and revenue for the region.
- Addition of several new manufacturing, production, and distribution facilities in Texas Central Park.
- Proximity to DFW Metroplex
- Good infrastructure
- Adequate water supply

### Sources of Economic Growth

- Sizeable city: Waco with sizeable industrial & retail sectors
- Tourism & weekend home economies from lakes
- McLennan County and the surrounding region attracts manufacturing facilities and will put the region on the map as a distribution and logistics hub.
  - Three new manufacturing additions will create more than 220 direct jobs.
  - Introduction of production and distribution companies to create more than 220 jobs.
  - Introduction of Amazon Fulfillment Center creating more than 1,000 jobs; will also put Heart of Texas on the map as a distribution and logistics hub
- Tesla to create talent pipeline, in partnership with Texas State Technical College in Waco, focusing on Electric Vehicles.
- Magnolia Market at the Silos will be a large entertainment and dining center that will attract visitors and tourists from all over the United States.
- 143-acre Cottonwood Creek Market is being built, featuring Cinemark Theatre, Top Golf, and a bowling center.<sup>342</sup>
  - Will provide employment in the construction, manufacturing, healthcare, hospitality and logistics sectors.

## Sources of Economic Challenge

- Post-agricultural economy with relatively low-skilled workforce
- Low median wage

## Needs

- Workforce development
- Community development
- Catalyst projects
- Improved internet access

## Unemployment Over Time:<sup>343</sup>

- Population: 255,816
- UI Claimant Count: 1,575

## Top 5 UI Claim Industries

1. School and employee bus transportation
2. Food service contractors
3. Limited-service restaurants
4. Temporary help services
5. Telemarketing and other contact centers

	<b>Employment October 2020<sup>344</sup></b>	<b>Employment October 2019</b>	<b>Labor Force October 2020</b>	<b>Labor Force October 2019</b>
Texas	13,115,800	13,663,754	14,084,000	14,160,862
Falls	6,378	6,413	6,737	6,619
Heart of Texas	159,427	161,035	168,742	166,398
	<b>Unemployed October 2020</b>	<b>Unemployment October 2020</b>	<b>Unemployed October 2019</b>	<b>Unemployment October 2019</b>
Texas	968,200	6.9	497,108	3.5
Falls	359	5.3	206	3.1
Heart of Texas	9,315	5.5%	5,399	3.2%

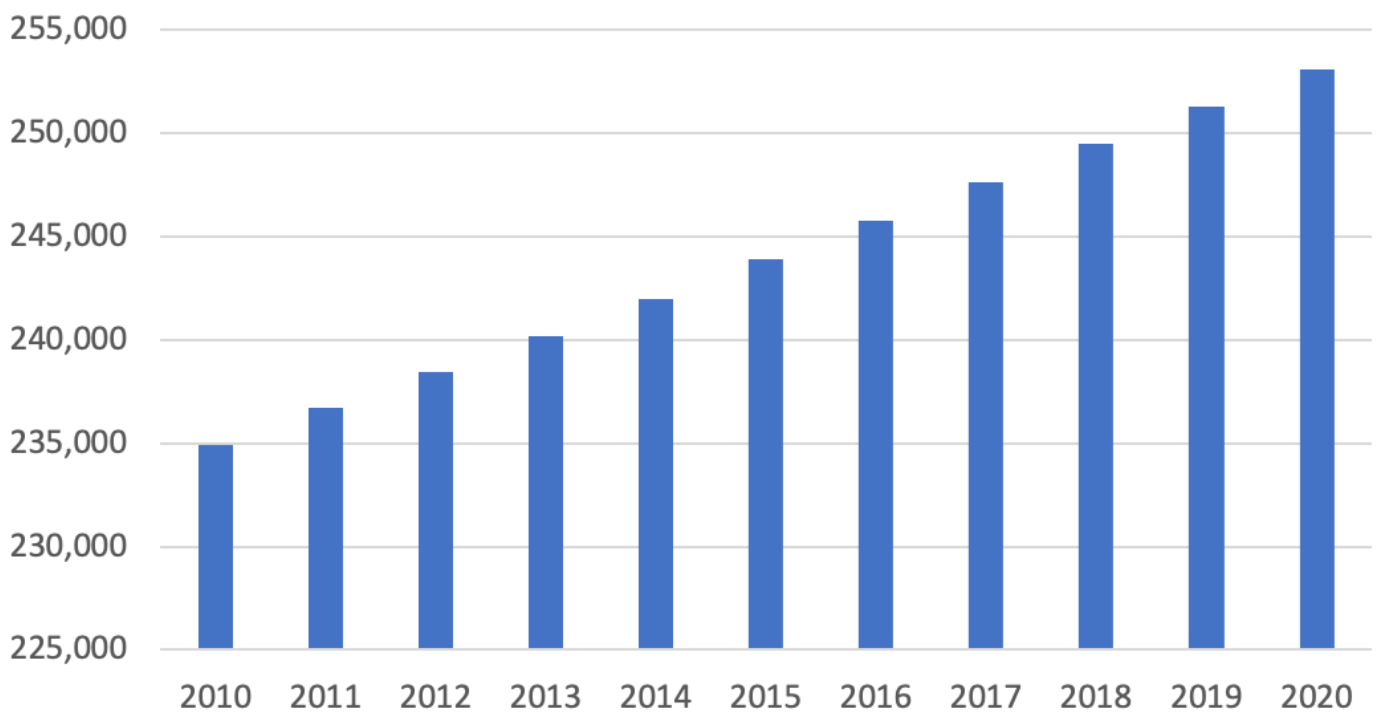


**Facts:**

- Current Population:<sup>345</sup> 251,089 (Most populous county in the region)
- Median Household Income: \$48,199 (+/--\$1,254)<sup>346</sup>
- Median Age: 33.3 vs. Texas Median Age: 34.6 vs. United States Median Age: 37.9
- Percent of working-age civilians in labor force: 62.2%<sup>347</sup> (61.2% in Texas, 61.7% in U.S.)<sup>348</sup>
- Student to teacher ratio: 14.1 (or 14 to 1)<sup>349</sup>
- Percent of children under age 18 in poverty: 22.6%<sup>350</sup>
- Percent of students enrolled in free or reduced lunch: 62%<sup>351</sup>

**Population over time:**<sup>352</sup>

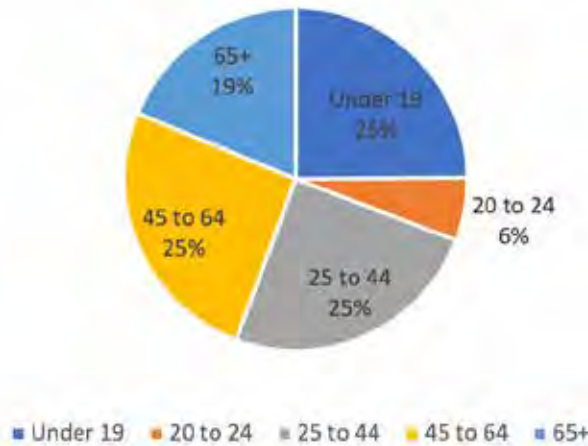
McLennan



**Age Distribution**<sup>353</sup>

- McLennan County sees the youngest population in the region; just 14% of the residents are of retirement age, and the median age is slightly younger (33.3) than the state median age (34.6).
- 57% are of working age (20-64); on par with the region (56%), and slightly lower than the state (59%).
- McLennan County also has the highest percentage of under 19 individuals, (29%), on par with the State of Texas and a few percentage points higher than the other counties in the region. This indicates that this is a promising location to raise children, or the inhabitants are of an age or more likely to raise families in this region.

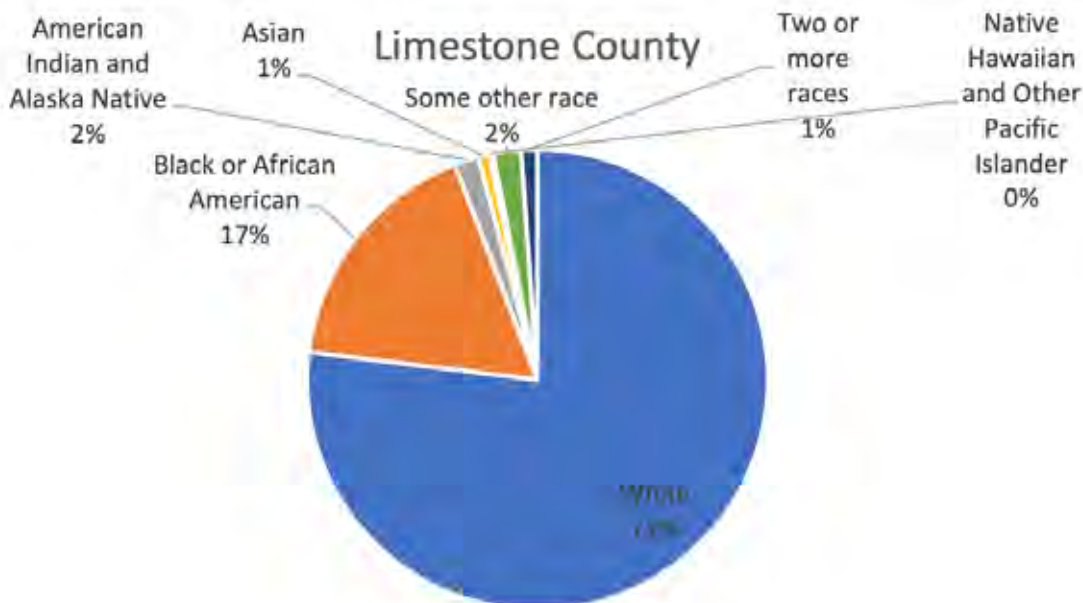
Limestone County



335

**Race/ethnicity distribution**

- McLennan County is predominantly White, and its demographics are on par with the region





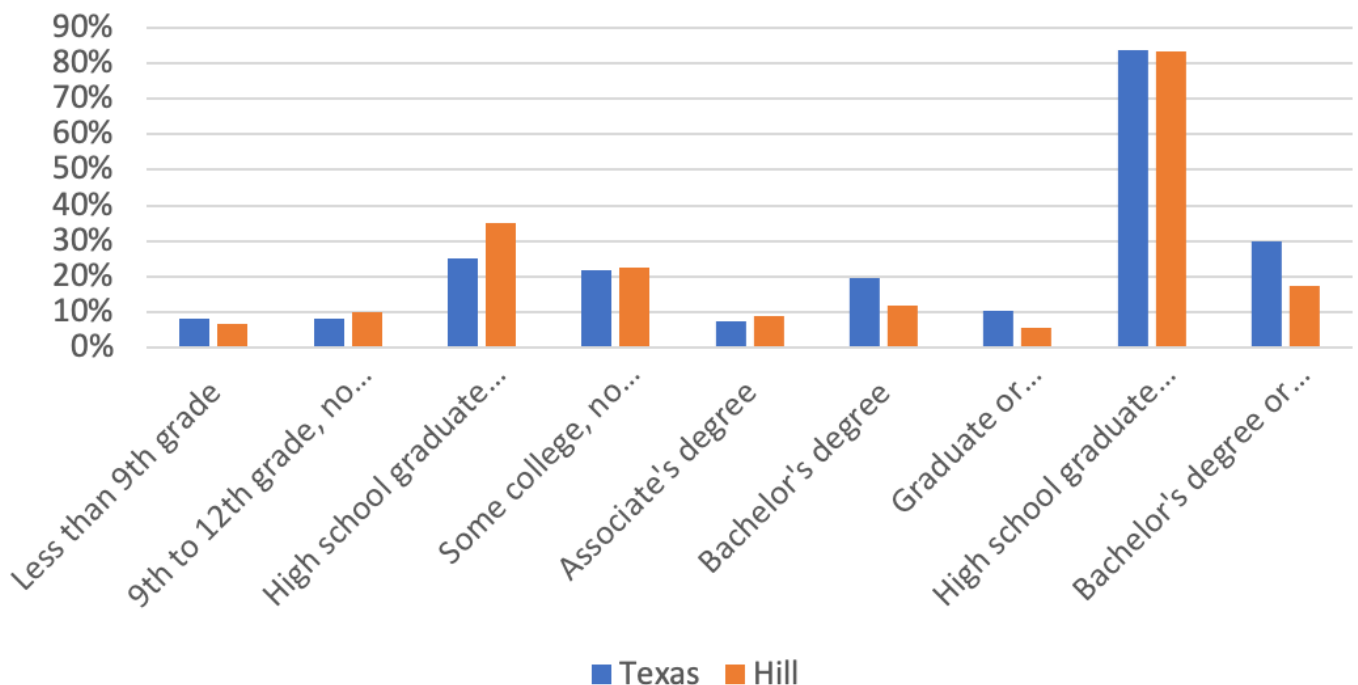
**Housing**<sup>356</sup>

- More than 10% of housing in McLennan County is vacant, almost half the rate of Hill County (20.5%)

	Texas	Bosque	Falls	Freestone
<b>HOUSING OCCUPANCY</b>				
Total housing units	10,937,026	9,767	7,781	9,495
Occupied housing units	88.60%	73.80%	66.80%	71.20%
Vacant housing units	11.40%	26.20%	33.20%	28.80%
	Hill	Limestone	McLennan	Heart of Texas
<b>HOUSING OCCUPANCY</b>				
Total housing units	16,337	10,731	101,142	155,253
Occupied housing units	79.50%	78.10%	89.00%	84.1%
Vacant housing units	20.50%	21.90%	11.00%	15.9%

McLennan county has a lower education level compared to the State of Texas; however, it has the highest percentage of population with a bachelor’s degree or higher, indicating that perhaps graduates from Baylor University may remain in the region. Education level is linked to higher skilled jobs and thus, higher wages, and therefore, McLennan county should try to convince Baylor graduates to remain in the area.

**Educational Attainment**



## Economic Distress Criteria:<sup>357</sup>

- McLennan county has the second highest threshold calculation for Per Capita Personal Income at 74.6%

## Economic Distress Criteria–Geographic Components

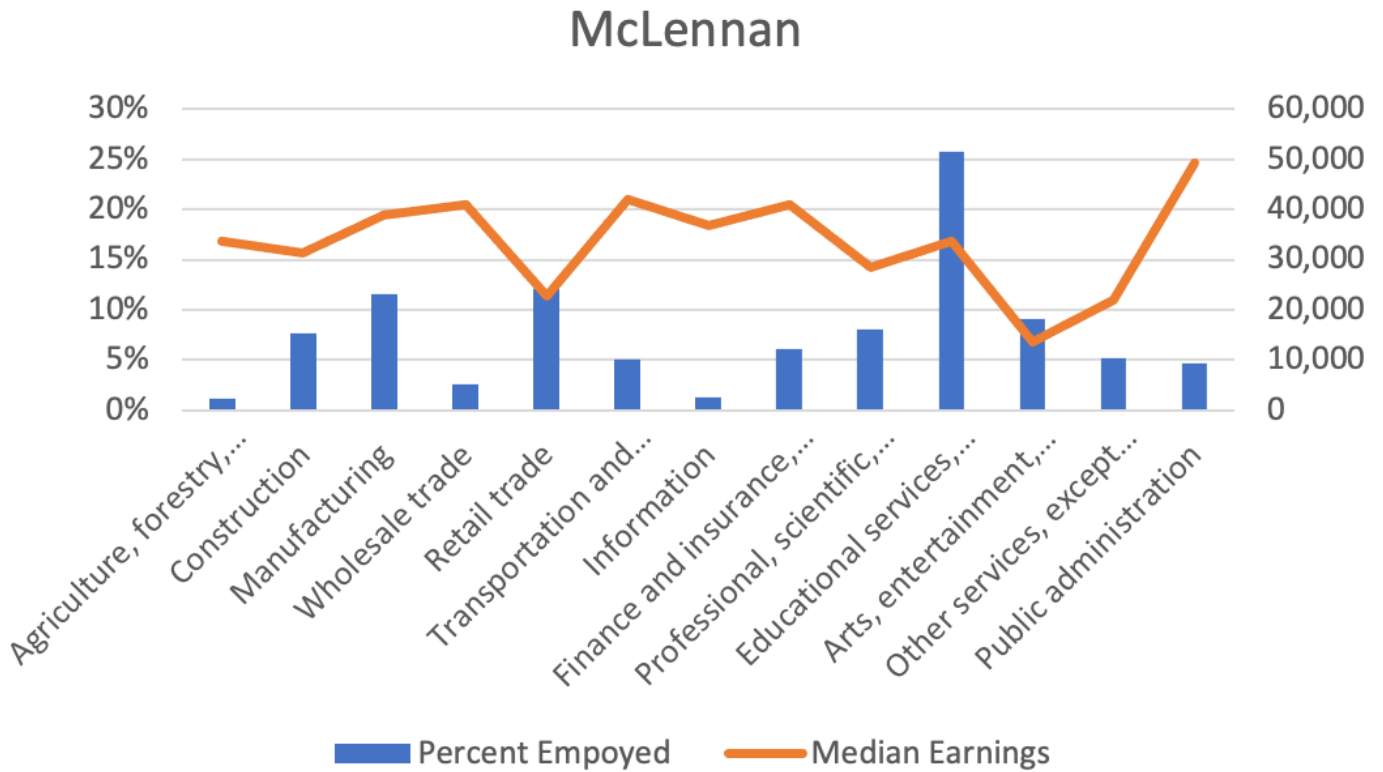
	24-Month Unemp	Threshold Calculation	2019 Per Personal Income (BEA)	Threshold Calculation	ACS 5-Year PCMI	Threshold Calculation
Bosque County, TX	4.31	-1.3	\$42,366	75	\$26,636	78.1
Falls County, TX	4.36	-1.25	\$35,258	62.4	\$18,745	55
Freestone County, TX	6.32	0.71	\$38,182	67.6	\$24,621	72.2
Hill County, TX	4.55	-1.06	\$41,240	73	\$26,370	77.3
Limestone County, TX	5.17	-0.44	\$37,774	66.9	\$22,595	66.3
McLennan County, TX	4.5	-1.11	\$42,159	74.6	\$25,703	75.4

## McLennan County Occupations



The following chart shows percent of total employment and earning by industry.

- Educational services, and health care and social assistance employ the most individuals in McLennan County, followed by Retail Trade and Manufacturing while Public Administration provides the highest wages.



### Industrial Parks

**Texas Central Park**<sup>358</sup> encompasses 3,000 acres, with 1,200 of them available for development. Located in the intersection at the intersection of I-35, Texas Highway 6, and US Highway 84, the park is served by the Union Pacific main railroad line and is home to 75 companies with over 8,600 employees and over 10 million square feet, including Coca Cola North America, Masterfoods USA, Caterpillar, and Allergan, to name a few.

**Robinson Business Park**<sup>359</sup> provides more than 600 acres of land at the crucial intersection of Interstate 35 and Highway 6/Loop 340.

The Robinson Business Park is the Waco Industrial Foundation’s newest acquisition and is comprised of approximately 175 acres of commercial-zoned land, and more than 460 acres of light industrial land. The property is served with transmission-grade utilities that can serve virtually any demand requirements and is one of the few industrial parks accessing the WMARSS reclaimed/purple pipe water system (20” line).

Plans call for a new roadway that will bisect the Robinson Business Park, granting access onto Interstate 35, Loop 340 and Greig Drive, which serves as the southeastern boundary of the property. Unrecorded covenants have been drafted to ensure a premium quality business park that seamlessly brings together commercial and retail with light industrial and distribution users.



**Waco International Aviation Park**<sup>360</sup> near Texas State Technical College (TSTC) and Interstate 35, is prime property for those in the aviation industry. TSTC is home to an all-weather runway that is 8,600 feet x 150 feet. Because the airport is not utilized by commercial airlines, the airspace is not congested. Over 300 acres of land are available for lease on TSTC airport. Adjacent to the airport is property that is particularly well suited to aircraft manufacturing and assembly. Other acreage is appropriate for aviation supplier networks not needing flight line access. Approximately 700 acres are available for development. The park is currently home to L-3 Integrated Communications, Sanderson Farms, and Dr Pepper Bottling.

**Waco Regional Airport Industrial Park**<sup>361</sup> is open to all types and sizes of business. The location lends itself naturally to businesses involved in the development or production of aviation-related products and services, and also works well for businesses that are compatible with the restrictions and regulations established by the FAA for land uses near airports. There are prime locations with ramp access connected directly to the airport runways. Businesses not requiring direct access to ramps can be located in either obligated or non-obligated areas of the airport. Non-obligated property can also be considered for sale through the newly created land sale incentive program at Waco Regional. This industrial park is also home to a Foreign Trade Zone to better meet the needs of all aviation, aviation-related, and non-aviation businesses that may locate there.

### **Retail and Entertainment District:**

- Magnolia Market at the Silos will be a large entertainment and dining center that will attract visitors and tourists from all over the United States.<sup>363</sup>
- 143-acre Cottonwood Creek Market is being built, featuring Cinemark Theatre, Top Golf, and a bowling center.<sup>363</sup>
- Will provide employment in the construction, manufacturing, healthcare, hospitality and logistics sectors.
- Brazos Riverfront,<sup>364</sup> an active mixed-use waterfront district along the Brazos River in downtown Waco, Texas and adjacent to Baylor University will combine residential, retail, restaurant, small office and hotel uses along walkable streetscapes and open space.

### **Magnolia Market at the Silos:**<sup>365</sup>

- Employs more than 600 people in area, top 25 employers in Waco<sup>366</sup>
- In 2016, its first full year of operation, Magnolia Market reported 1,288,067 visitors.<sup>367</sup>
- Attractions include:
  - Shopping
  - Food Trucks
- Magnolia Market is credited for revitalizing small town Waco.

### New Production and Manufacturing Facilities:

- McLennan County and the surrounding region attracts manufacturing facilities and will put the region on the map as a distribution and logistics hub.
  - 3 new manufacturing additions will create more than 220 direct jobs.
  - Introduction of production and distribution companies to create more than 220 jobs.
  - Introduction of Amazon Fulfillment Center creating more than 1,000 jobs; will also put Heart of Texas on the map as a distribution and logistics hub.
- Tesla to create talent pipeline, in partnership with Texas State Technical College in Waco, focusing on Electric Vehicles.

### Texas Central Park New Additions

**Envases Group**, a Mexico-based global leader in the production of packaging solutions, announced plans to open its first aluminum can production and distribution center in Texas Central Park in Waco, Texas. The opening is projected for late 2021.<sup>368</sup>

- 120 full time jobs; 300 indirect jobs (maintenances activities, supplies, distribution of the products, etc.) and more than 250 jobs in the construction of the facility.
- \$100MM capital investment will help community.
- Prime central location
- Manufacturing workforce
- Proximity to higher education resources to nourish talent pipeline

**Hello Bello**<sup>369</sup> to open up a diaper distribution and manufacturing center in Texas Central Park in Q2 2021.

- 312,000 square-foot state-of-the-art manufacturing center
- Expects to create over 110 new jobs in the region
- \$31M in capital investment
- Decision is based on the location's **central geography** for its direct-to-consumer customers, retail and premium supply partners, providing **logistical efficiencies** and significant **reduction in freight**.
- Hello Bello's decision to choose Waco for its manufacturing and distribution operations is a testament to our **central location**, energetic, **skilled workforce**, **lower taxes** and **reasonable regulations**.

**Merrick Engineering**<sup>370</sup>

- Leading manufacturer of plastic and injection molded consumer products
- 400,000 square-foot manufacturing and distribution facility along with the corporate offices.
- Construction commencing in 2020, relocating in 2021
- Will create 20 new positions. Of the new positions to be created, 10 will be headquarter professionals.

### Other Additions to the Region

#### Amazon<sup>371</sup>

Introduction of Amazon Fulfillment Center creates jobs and is a good step toward economic recovery; it will also put Heart of Texas on the map as a distribution and logistics hub

- 700,000-square-foot Amazon robotic fulfillment center in Waco.
- Will create 1,000 new jobs that will pay a minimum of \$15 an hour and will include comprehensive budgets and as much as 20 weeks of maternal and parental paid leave.
- Under construction on a more than 90-acre site at 2000 Exchange Parkway west of Baylor Scott & White Hillcrest Medical Center, is scheduled to open 2021.
- The Greater Waco Chamber of Commerce, the Waco-McLennan County Economic Development Corp. and the Waco Industrial Foundation worked together to attract Amazon.

#### Holt Cat:<sup>372</sup>

- Holt Cat, the largest distributor of Caterpillar equipment in the United States, said plans to open its new manufacturing facility remain on track in Waco, Texas.
- San Antonio-based Holt Cat acquired the former Caterpillar Work Tools plant in Waco from Illinois-based Caterpillar Inc. in February. Holt Cat said it plans to build proprietary items such as Holt Spray King water trucks and tank products and custom-engineered products at the factory.
- “Our May opening is still on schedule. We are confident we will find the quality of candidates we need in the Waco area to get the facility up and running successfully,” Beki Hutchinson, Holt Cat’s senior vice president of human resources, said according to the Waco Herald-Tribune.
- Holt Cat said it is hiring 100 employees for the factory, including technicians, welders, fabricators and managers. Hutchinson said the company may use “remote interviewing tools” to interview job applicants.
- The factory includes 107 acres with three buildings and a total of 170,000 square feet of manufacturing, warehouse and office space, the company said in a press release.

#### Texas Meter & Device<sup>373</sup>

- Will begin construction of its new corporate headquarters in Waco.
- This project will involve a \$3.5 million capital investment with the construction of a 50,000-70,000 square foot headquarters and assembly center.
- Will retain 60 jobs at its new facility.

#### ZinkPower<sup>374</sup>

- One of the business units of the Australian group Kopf
- Leader in hot-dip galvanizing and powder-coating services, will locate its first U.S. greenfield operation in Waco, Texas.
- \$32 million investment, which includes the construction of a 160,000 square-foot facility and equipment
- Over four years, Zinkpower anticipates the creation of 100 new jobs.
- The Waco plant will be the only hot-dip galvanizing center between the Dallas/Fort Worth Metroplex and San Antonio.

**Aspen Custom Trailers**<sup>375</sup>

- A high-end custom commercial trailer manufacturer, based in Alberta, Canada.
- Chose Waco for first U.S. manufacturing operation.
- Will invest \$11.27 million into its new 58,000 square foot facility in the Gateway Business Park, with plans to expand to 70,000 square feet.
- The company will add 70 new highly skilled jobs in the market.

**Ryonet Corporation**<sup>376</sup>

- A leading screen printing supply distributor will consolidate its US distribution centers in Kansas and Georgia to a single location in Waco, TX.
- The company's 35,000 square foot facility will employ 10 employees initially with plans for additional growth.

**Laminate Technologies**<sup>377</sup>

- A custom laminate panel and fabrication manufacturer will relocate its production facility within Texas to Waco.
- The company will invest \$4 million into a 50,000 square foot facility and plans to create 40 jobs by 2021.

**Advanced Rail Systems**<sup>378</sup>

- Leaders in railway automation, is moving its manufacturing operation to Riesel, TX in McLennan County from Falls County.
- This \$2.2 million project will bring 69 new high-skilled jobs to the community.
- The company is currently building its 23,250 square foot manufacturing facility, where it will produce power switch machines for rail operations.

**SpaceX**<sup>379</sup>

- Enhancing its presence in the Greater Waco area, announcing a \$10 million expansion of water and electric infrastructure improvements to its existing facility in McGregor.

**Prairie Hill Wind Farm project**<sup>380</sup>

- One hundred new wind turbines will be spread across McLennan County and Limestone County as part of the Prairie Hill Wind Farm project.
- This project is a \$30 million investment in McLennan County, part of a larger \$300+ million wind turbine installation investment for the region.
- Upon completion, the turbines will generate approximately 250 to 300 megawatts of energy annually.

**Glory Leasing, LLC**<sup>381</sup>

- Announced a new solar farm to the Central Texas area.
- Divided evenly between McLennan and Bosque Counties, this \$130MM+ solar project is expected to generate over 161 MW.
- Construction is projected to begin Q2 2020 with completion scheduled late 2022.
- Over 430 MW of renewable energy production be added to the state electric grid, annually.

### New Era Partners<sup>382</sup>

- Begun construction on a \$10 million facility for the Oceans Behavioral Health Hospital network located in the Greenway Business Park, adjacent to Baylor Scott & White Medical Center – Hillcrest.
- Oceans Healthcare is a behavioral health provider focused on healing and long-term recovery.
- The company plans to open a 48-bed, 35,000 square foot facility later this year.
- Once completed, the hospital expects to employ 90 clinical and non-clinical positions.

### The Coca-Cola Company<sup>383</sup>

- National manufacturing company has announced a \$30 million investment and a 20,000 square foot expansion of their Waco facility.
- The project will create 20 new skilled positions in addition to retention of their more than 350 current employees.
- Coca Cola is adding a new “flex brew” line the Waco facility, which will permit research and development of new products and is the first of its kind in the United States.

### Tesla<sup>384</sup>

- Tesla offers a 12-week electric vehicle service training program, culminating in a 2-year employment contract at a Tesla Service Center.
- Disadvantage: Completing this program will likely require relocation out of the Heart of Texas area.

The START Program Technician will go through an intensive EV service training program designed to provide the candidates with the skills necessary for a **successful career with Tesla**. During the program, students will develop technical expertise and earn certifications through a blended approach of in-class theory, hands-on labs and self-paced learning. Students are also given enhanced soft skills and team-based repair practices. Relevant military service may be substituted for industry experience, and military veterans are encouraged to apply.

## Mart Texas in Limestone and McLennan Counties

In 2019, Engie began building a new wind farm<sup>385</sup> providing not only power to the grid, but also dollars for the school district and jobs for the area.

- The capacity to generate 300 megawatts of electricity
- Can power 200 homes during peak periods, so using that formula the farm could light up about 60,000 homes.
- The \$330 million project scattered 100 wind turbines across McLennan and Limestone counties that not only will generate electricity but also tax revenue for the local school district.
- 35,000 acres of land that are under long-term lease, primarily agricultural land with low-density residences; compatible with the operation of a wind energy project.
- Engie has at least two major clients, including Walmart, which have agreed to purchase almost half the power the turbines near Mart will generate.
- Winds there average about 7 meters per second at a height of 80 meters, according to a U.S. Department of Energy map.<sup>396</sup>



### Solar Farm in Robinson with Cypress Creek Renewables<sup>387</sup>

- Robinson is close to a substation.
- Initial 55-percent tax abatement, which allows the property tax to be reduced for about a 5-year period.
- Perk is tax revenue- won't bring a large number of jobs to the area.
- The solar farm will be close to an industrial park, which might encourage other companies to put down roots in Robinson.
- A separate company looking to build a third solar farm in County Precinct 4 that will be in both McLennan and Bosque Counties.

### Eddy II, owned by NRG Energy<sup>388</sup>

- Solar Farm in Bruceville-Eddy
- NRG Energy got tax breaks for the \$13 million project.
- Nearly 90 acres, Eddy II packs a 10-megawatt wallop, enough to provide energy to 1,300 homes annually.

### Major Employers<sup>389</sup>

Rank	Company	Industry	Total Employment
1	Baylor University	Education	3,253
2	Waco ISD	Education	2,373
3	H-E-B	Retail	2,000
4	Baylor Scott & White Medical Center - Hillcrest	Healthcare	1,736
5	Texas State Technical College Waco	Education	1,706
6	Ascension Providence	Healthcare	1,622
7	City of Waco	Local Government	1,518
8	McLennan County	Local Government	1,201
9	Sanderson Farms Inc.	Manufacturing	1,200
10	Wal-Mart	Retail	1,174
11	Midway ISD	Education	1,081
12	Veterans Administration Medical Center	Healthcare	886
13	Examination Management Services, Inc. (EMSI)	Professional Services	824
14	Veterans Affairs Regional Office	Federal Government	796
15	AbbVie	Manufacturing	785
16	L3Harris	Aerospace	774
17	McLennan Community College	Education	719
18	Mars Wrigley Confectionery	Manufacturing	700
19	Aramark	Professional Services	696

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20	American Income Life	Insurance	693
21	Magnolia	Retail	675
22	Texas Materials	Manufacturing	672
23	Cargill Value Added Meats	Manufacturing	646
24	SpaceX	Aerospace	590
25	Texas Department of Human Services	Management	549
26	Versalift	Manufacturing	518
27	Family Health Center	Healthcare	510
28	Texas Youth Commission - McLennan County SJCF	State Government	499
29	Howmet Fastening Systems	Manufacturing	490
30	Pilgrims	Manufacturing	480
31	Texas Farm Bureau and Affiliated Companies	Insurance	471
32	La Vega ISD	Education	445
33	Coca-Cola North America	Manufacturing	440
34	Tractor Supply Company Distribution	Retail	420
35	Connally ISD	Education	394
36	China Spring ISD	Education	388
37	O-I Glass	Manufacturing	385
38	Heart of Texas Region MHMR Center	Healthcare	384
39	Heart of Texas Goodwill Industries, Inc.	Non-Profit	383
40	Wal-Mart Return Center	Logistics	372
41	Brazos Masonry	Construction	354
42	Army and Air Force Exchange Service	Logistics	353
43	Texas Department of Transportation	State Government	336
44	Robinson ISD	Education	325
45	Sherwin Williams	Logistics	313
46	Packaging Corporation of America	Manufacturing	313
47	Lorena ISD	Education	302
48	Johnson Roofing	Construction	300
49	Neighborly	Management	295
50	Caterpillar Logistics - Parts Distribution Center	Logistics	272
51	Lochridge Priest	Manufacturing	264
52	McGregor ISD	Education	253
53	Big Creek Construction	Construction	250



54	Clayton Homes	Manufacturing	260
55	Eagle Systems, Inc.	Professional Services	238
56	Education Service Center Region 12	Education	234
57	Fleetwood Homes	Manufacturing	230
58	United States Postal Service	Government	168
59	Economic Opportunities Advancement Corp	Non-Profit	229
60	George's Restaurant	Services	225
61	Waco Center for Youth	Healthcare	223
62	Methodist Children's Home	Healthcare	222
63	Nurses Unlimited, Inc.	Healthcare	216
64	Brazos Electric	Utility	215
65	Atmos Energy	Utility	210
66	American Amicable Life Insurance Co	Insurance	199
67	Central Freight Lines, Inc.	Logistics	188
68	Trane	Construction	184
69	Adecco Employment Services	Professional Services	180
70	TYMCO	Manufacturing	177
71	Total Placement Staffing Solutions	Education	171
72	Scott & White Healthcare	Healthcare	171
73	Packless Industries	Manufacturing	169
74	Manitou North America	Manufacturing	167
75	Central Texas Iron Works	Manufacturing	164
76	Holt CAT	Construction	162
77	Quality Brickworks, Ltd.	Construction	160
78	Support Services Group - S2G	Professional Services	157
79	UPS Delivery	Logistics	155
80	Dirt Cheap	Retail	154
81	Jessup Manufactured Housing	Manufacturing	153
82	Rapoport Academy Public School	Education	152
83	Blue Cross Blue shield	Health Care	150
84	Knife River Corporation	Construction	150
85	AT&T	Utility	150
86	Coca-Cola Southwest Beverage	Logistics	149
87	Integ	Media	148

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88	Merrick Engineering	Manufacturing	148
89	Hobbs Bonded Fibers	Manufacturing	146
90	Spherion	Professional Services	146
91	Capstone Mechanical	Construction	144
92	Texas Life Insurance Company	Insurance	144
93	Extraco Banks	Financial	142
94	JRBT Certified Public Accountants	Professional Services	138
95	Central Texas Corrugated	Manufacturing	137
96	Spectrum	Utility	137
97	Visiting Angels	Healthcare	135
98	Ridgecrest Retirement Center	Healthcare	133
99	Kasparian Underground, LLC	Construction	132
100	Clarke Products	Manufacturing	131
101	H&B Packing Co. Inc.	Manufacturing	130
102	Naman Howell Smith & Lee, PLLC	Professional Services	125
103	M. Lipsitz & Co., Ltd.	Manufacturing	125
104	YMCA of Central Texas	Non-Profit	124
105	Wesley Woods Alzheimer's Care Center	Healthcare	122
106	Metals 2 Go	Manufacturing	121
107	Ferguson Enterprises Inc. 474	Distribution	121
108	Lowe's Home Center	Retail	120
109	Moody ISD	Education	117
110	Oncor	Utility	115
111	Dillard's Department Store	Retail	113
112	Allen Samuels Dodge-Chrysler-Jeep	Retail	111
113	Sturdisteel Company	Manufacturing	110
114	Quality Care Nursing & Rehabilitation Center	Healthcare	110
115	Sam's Wholesale Club	Retail	108
116	Bosqueville ISD	Education	108
117	Ridgewood Country Club	Recreation	106
118	Community Bank & Trust	Financial	105
119	Swan Products	Manufacturing	104
120	Britco Structures USA, LLC	Manufacturing	100
121	Brazos River Authority	State Government	99

122	The First National Bank of Central Texas	Financial	98
123	American Bank	Financial	98
124	VanTran Industries	Manufacturing	98
125	Crestview Healthcare Residence	Healthcare	96
126	Behlen Manufacturing	Manufacturing	94
127	Hilton Waco	Hospitality	93
128	Pattillo, Brown & Hill, L.L.P.	Professional Services	93
129	Jobes Company / Easy Gardener Products Inc.	Manufacturing	91
130	Do it Best Corp.	Logistics	91
131	City of Woodway	Local Government	90
132	Keurig Dr Pepper	Logistics	90
133	Valley Mills ISD	Education	90
134	City of Hewitt	Local Government	89
135	Crawford ISD	Education	88
136	Regent Care	Healthcare	88
137	Alamo Structural Steel	Construction	87
138	Marathon Norco Aerospace, Inc.	Aerospace	86
139	Riesel ISD	Education	85
140	Sonoco Flexible Packaging	Manufacturing	84
141	Ram Aircraft, LP	Aerospace	84
142	Jeff Hunter Motors	Retail	83
143	Glazer's Wholesale Distributors	Logistics	82
144	Dealers Electrical Supply Co.	Utility	82
145	Waco Housing Authority & Affiliates	Local Government	81
146	Specialty Composites Group	Manufacturing	80
147	Forterra Pipe and Precast	Manufacturing	80
148	Imperial Woodworks, Inc.	Manufacturing	80
149	Target	Retail	80
150	Central National Bank	Financial	78
151	Bird-Kultgen, Inc.	Retail	78
152	Simple Bills	Professional Services	77
153	City of Bellmead	Local Government	76
154	KXXV News Channel 25	Media	76
155	Grande Communications	Utility	76

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156	Home Depot	Retail	75
157	Richard Karr Motors	Retail	74
158	Waco Tribune-Herald	Media	74
159	City of Robinson	Local Government	72
160	Balfour / Powers Varsity Jackets	Manufacturing	69
161	Lehigh White Cement	Manufacturing	65
162	KCEN-TV	Media	65
163	Let's Gel	Manufacturing	63
164	PCA Texas Acquisition, LLC	Manufacturing	63
165	Wells Fargo	Financial	63
166	Members Choice of Texas FCU	Professional Services	60
167	The Reinforced Earth Company	Manufacturing	59
168	Profiles International	Professional Services	57
169	Evans Enterprise	Manufacturing	55
170	Educators Credit Union	Financial	55
171	KWTX Broadcasting	Media	54
172	Kingsdown, Inc.	Manufacturing	53
173	Lark United Manufacturing	Manufacturing	52
174	WRS Group, Ltd.	Manufacturing	52
175	Pepsi Beverage Company	Manufacturing	51
176	Martin Marietta Materials	Manufacturing	50
177	Chase Bank	Financial	50
178	Communities in Schools of the Heart of Texas	Non-Profit	49
179	Best Buy	Retail	48
180	Tejas Logistics System	Logistics	46
181	Polyglass USA, Inc	Manufacturing	46
182	Insurers of Texas	Insurance	40
183	Romark Logistics	Logistics	40
184	Patrick Industries, Inc.	Manufacturing	40
185	Fourfoot, LLC	Distribution	38
186	AMA Nystrom Printing/Finishing	Services	38
187	Brazos Higher Education Service Corporation, Inc.	Financial	36
188	Heart of Texas Council of Governments	Local Government	29
189	Cenikor	Healthcare	29



190	Meals on Wheels Waco	Non-Profit	27
191	Carter Blood Care	Non-Profit	25
192	Curves International	Management	24
19	Lowe Precast, Inc.	Construction	21
194	Durham School Services	Education	15

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