



CEDS 2019

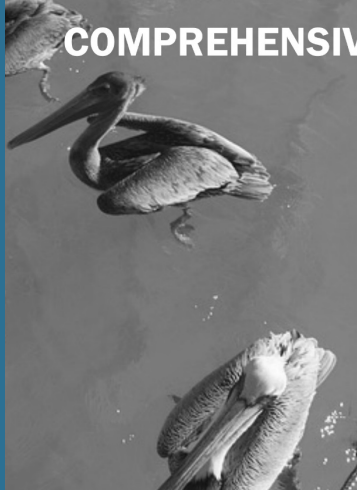
APALACHEE REGION



Executive Summary



COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY



Apalachee Region Economic Development District

2018-2022



The Apalachee CEDS 2018-2022 brings together data, stakeholder input, and analyses to advance three regional economic development goals. Under these three goals are 28 objectives. Ultimately, the Apalachee CEDS provides key support for all EDA-facing economic development efforts among the nine counties in this Northwest Florida area. It also offers insights that can assist organizations looking to make community and economic impacts of any shape and size.

NAICS	Description	Ind Mix Effect	Nat Growth Effect	Expected Change	Competitive Effect	2012 Jobs	2017 Jobs
11	Forestry, Fishing, and Related Activities	40	4	44	13	2177	2233
21	Mining	-35	-3	-38	594	328	883
22	Utilities	-48	-5	-53	157	494	598
23	Construction	499	48	548	1256	10899	12703
31-33	Manufacturing	-318	-31	-349	492	4815	4957
42	Wholesale Trade	127	12	139	708	4239	5085
44-45	Retail Trade	284	27	311	3290	24535	28136
48-49	Transportation and Warehousing	186	18	204	175	3654	4032
51	Information	-111	-11	-122	525	4265	4667
52	Finance and Insurance	-848	-82	-930	383	9976	9428
53	Real Estate and Rental and Leasing	338	33	371	846	9307	10524
54	Professional, Scientific, and Technical Services	706	68	774	1447	16827	19047
55	Management of Companies and Enterprises	43	4	48	204	812	1063
56	Administrative Support and Waste Mgt Services	410	40	450	1413	12881	14744
61	Educational Services	210	20	230	469	3692	4391
62	Health Care and Social Assistance	1016	98	1114	1359	26361	28834
71	Arts, Entertainment and Recreation	68	7	75	-25	3880	3930
72	Accommodation and Food Services	1031	100	1130	2111	19227	22468
81	Other Services, except Public Administration	97	9	106	605	15668	16379

The region has long supported industry concentrations of Agriculture, Forestry, and Fishing in rural areas and Professional & Technical Services in urbanized areas (namely Tallahassee).

Most Apalachee industries outperformed expected growth over the 2012-2017 period – see the “Competitive Effect” column in the table at left – indicating regional resilience following the recession.

Apalachee partners can leverage cross disciplinary talent, from IFAS to the High Magnetics Laboratory, to support entrepreneurship and workforce development in future projects.



The 2019 executive summary provides updates regarding data pulls and tweaks to objectives. Apalachee Regional Planning Council hopes that it can serve as a useful, quick reference during project development.

For the full Apalachee CEDS, please refer to the ARPC website or contact staff for a copy:

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THREE GOALS

28 OBJECTIVES

EDA FUNDING

DATA DRAWS

THREE GOALS



GOAL 1

*Enhance Interconnectivity
and Collaboration*

GOAL 2

*Fortify and Animate
Apalachee Strengths*

GOAL 3

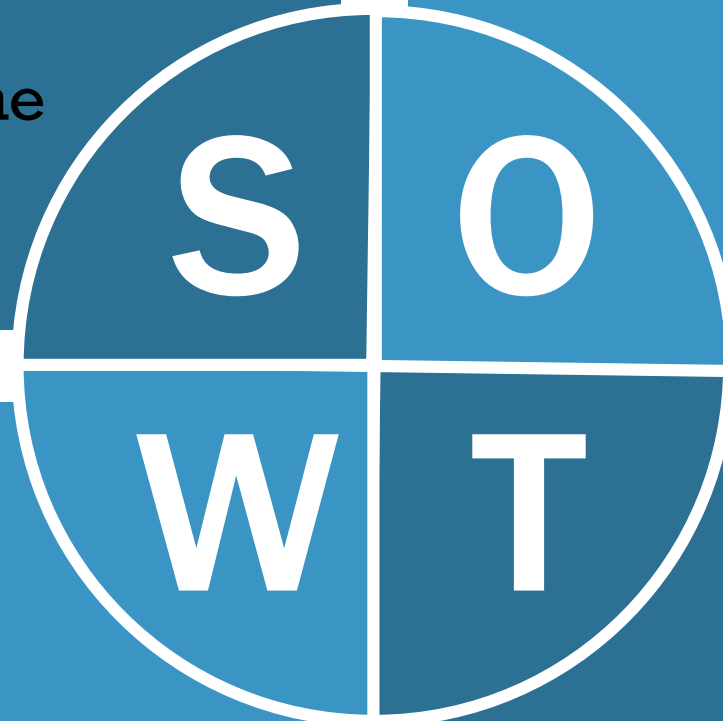
*Bring New Voices to the
ED Drawing Board*

STRENGTHS

Public and gov't facing goods and services

Increase in per capita income

Decline in unemployment



OPPORTUNITIES

Ec Dev Grants for:

Entrepreneurship

Public Works

Economic Adjustment

Low MSA / Regional population

Low HS graduation rates

High poverty rates

Gov't Budget Changes

Potential Recessions

Natural disasters

WEAKNESSES

THREATS

28 OBJECTIVES



GOAL 1: OBJECTIVES

- 1.1 Increase employee and business resilience through research, partnerships, workshops, other technical assistance, and innovative projects.
- 1.2 Enhance overlap and mutually-reinforcing output between Economic Development Elements, Main Street Plans, Community Redevelopment Area Plans, Economic Development Strategic Plans, Workforce Development Plans, Land Use Plans, and Local Mitigation Strategies and other hazard preparation-response-recovery plans.
- 1.3 Research and develop Triumph, RESTORE, Job Growth Grant Fund, and other project applications that can be leveraged with EDA funding to support resilient rural economies.
- 1.4 Promote the Apalachee Region as a multi-faceted tourism destination through research, partnerships, workshops, other technical assistance, and innovative projects.

GOAL 1: OBJECTIVES

- 1.5 Use the DEP “Trail Town” concept and associated planning and implementation measures, in conjunction with support for the Florida Greenways & Trails System and regional trails of importance, to enhance local economies.
- 1.6 Connect entrepreneurs to grants, competitions, equity financing, angel investing, incentives, creative match leveraging, and other funding.
- 1.7 Connect and recapitalize the Apalachee Revolving Loan Fund through interaction with economic development organizations, banks, credit unions, other business and financial stakeholders, and grants, and increase impact within the region.
- 1.8 Support entrepreneurship in NAICS 11, 44-45, 51, 54, 62, 71, and 72 sectors through research, partnerships, workshops, other technical assistance, and innovative projects.

GOAL 1: OBJECTIVES

- 1.9 Enhance comprehensive planning and zoning policies throughout the region to allow greater variety of land uses and promote the evolution of multi-modal, mixed-use districts (e.g. innovation, healthcare, agritourism, etc.).
- 1.10 Increase the presence of New Urbanism and Smart Growth-based economic development through research, partnerships, workshops, other technical assistance, and innovative projects effectuated by Main Street organizations, Community Redevelopment Areas, district planning, and other policies and entities.
- 1.11 Support and enhance Primary Education/Post-Secondary Adult Vocational/College/University-to-employer/economic development organization/chamber/other entity connections and project development in the areas of workforce development, entrepreneurship, business recruitment, and business expansion.
- 1.12 Support collaborative workforce development initiatives that respond to local job demand reflected by data such as Bureau of Labor Market Statistics Regional Demand Occupations Lists, growing sectors of the Apalachee economy, and regional assets.

GOAL 2: OBJECTIVES

- 2.1 Explore economic resilience planning and implementation that renders local and regional economies more fit to recover from macro-economic downturns and natural disasters.
- 2.2 Work to create a strong pipeline between all Innovation Park assets (e.g. High Magnetic Lab, High Performance Materials Institute, FAMU-FSU Engineering, businesses) and opportunities to commercialize technology, assist entrepreneurs, assist with business expansion, and attract new businesses to the area.
- 2.3 Assist efforts to diversify rural economies by advancing site readiness and promoting real estate re-use opportunities toward uses in professional/technical offices, warehousing, light/clean tech manufacturing, cloud data storage and agricultural technology.

GOAL 2: OBJECTIVES

- 2.4 Support the development of I-10 interchanges in Jefferson, Gadsden, Leon, and Jackson counties through planning, infrastructure, interlocal agreements, and marketing.
- 2.5 Promote workforce development through research, partnerships, workshops, other technical assistance, and innovative projects that serve NAICS 11, 23, 31-33, 44-45, 48-49, 51, 62, 71, 72, and 92 sectors.
- 2.6 Support the regional local food movement through research, partnerships, workshops, other technical assistance, and innovative projects.
- 2.7 Support regional workforce development, including Incumbent Worker Training, Quick Response Training, and other grants and partnerships available to businesses and local governments through CareerSource.
- 2.8 Explore new frontiers in low-impact, high-return forest and agriculture uses including the eco-tourism and medical marijuana value chains.

GOAL 2: OBJECTIVES

- 2.9 Support infrastructure development at the Port at Port St. Joe, Intermodal Logistics Center in Gadsden County, and associated Freight and Logistics Zone and I-10 Logistics and Manufacturing Corridor projects.
- 2.10 Support business inducement and expansions at Regional commerce parks and strategic sites, including the Gulf Power Certified Site at Marianna Airport Commerce Park and Marianna/Jackson County Distribution and Construction Services Park, Florida-Alabama Mega Site near Campbellton, Wakulla County's Opportunity Park, and Port of Port St. Joe.
- 2.11 Enhance aviation supporting freight and tourism clusters by increasing activity at and around Apalachee airports including Tallahassee, Carrabelle, Apalachicola, Marianna, Calhoun County and Wakulla County.

GOAL 3: OBJECTIVES

- 3.1 Meet the needs of a growing 55 and older community by planning for aging in place, older-adult facing business development, and more resilient assisted living and senior center facilities.
- 3.2 Explore opportunities to channel Forestry, Fishing, Agriculture, and Hunting activities into new value-added and scaled revenue streams, in collaboration with actors such as UF IFAS.
- 3.3 Assist rural areas to provide increased public safety, workforce/attainable housing, historic preservation, recreation, beautification projects and policies through research, partnerships, workshops, other technical assistance, and innovative projects.
- 3.4 Promote the growth of the creative class via quality of life/quality of place research, partnerships, workshops, other technical assistance, and innovative projects.
- 3.5 Increase income generating and talent acquisition opportunities for high school youth through externships, work-study, apprenticeships, internships, and other innovative programs.

A black and white photograph of a coastal landscape. The foreground is filled with low-lying, scrubby vegetation. In the middle ground, there is a body of water, possibly a bay or a wide river, with some white foam or surf visible. The horizon is flat, and the sky is clear and light-colored. A dark blue horizontal bar is overlaid on the right side of the image, containing the text "EDA FUNDING" in white, bold, uppercase letters.

EDA FUNDING

FUNDING OPPORTUNITIES

EDA Programs

[Public Works](#)

[Economic Adjustment](#)

[Disaster Supplemental](#)

[Regional Innovation Strategies](#)

[University Centers](#)



FLORIDA
WELCOMES
YOU

DATA DRAWS



DEMOGRAPHY

POPULATION

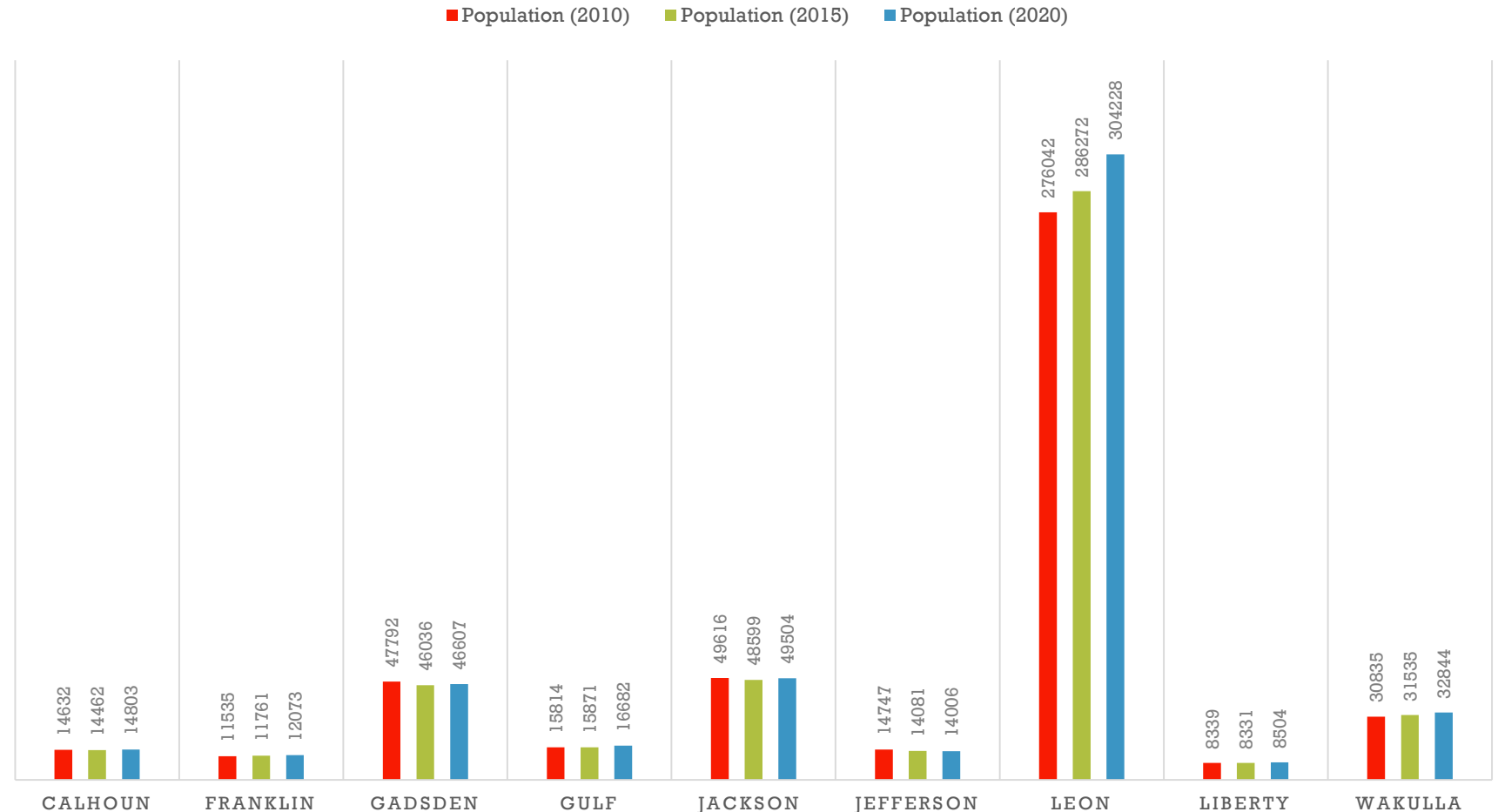
Largest age cohorts:
Ages 20-24
Ages 25-29

Significant age cohort
growth (next 10 years):
Ages 30-34
Ages 75-79

Regionwide percent
increase 2015-2020
5%

Statewide percent
increase 2015-2020
6.6%

POPULATION CHANGE AND PROJECTIONS, ARPC REGION



POVERTY RATE

Rate increases

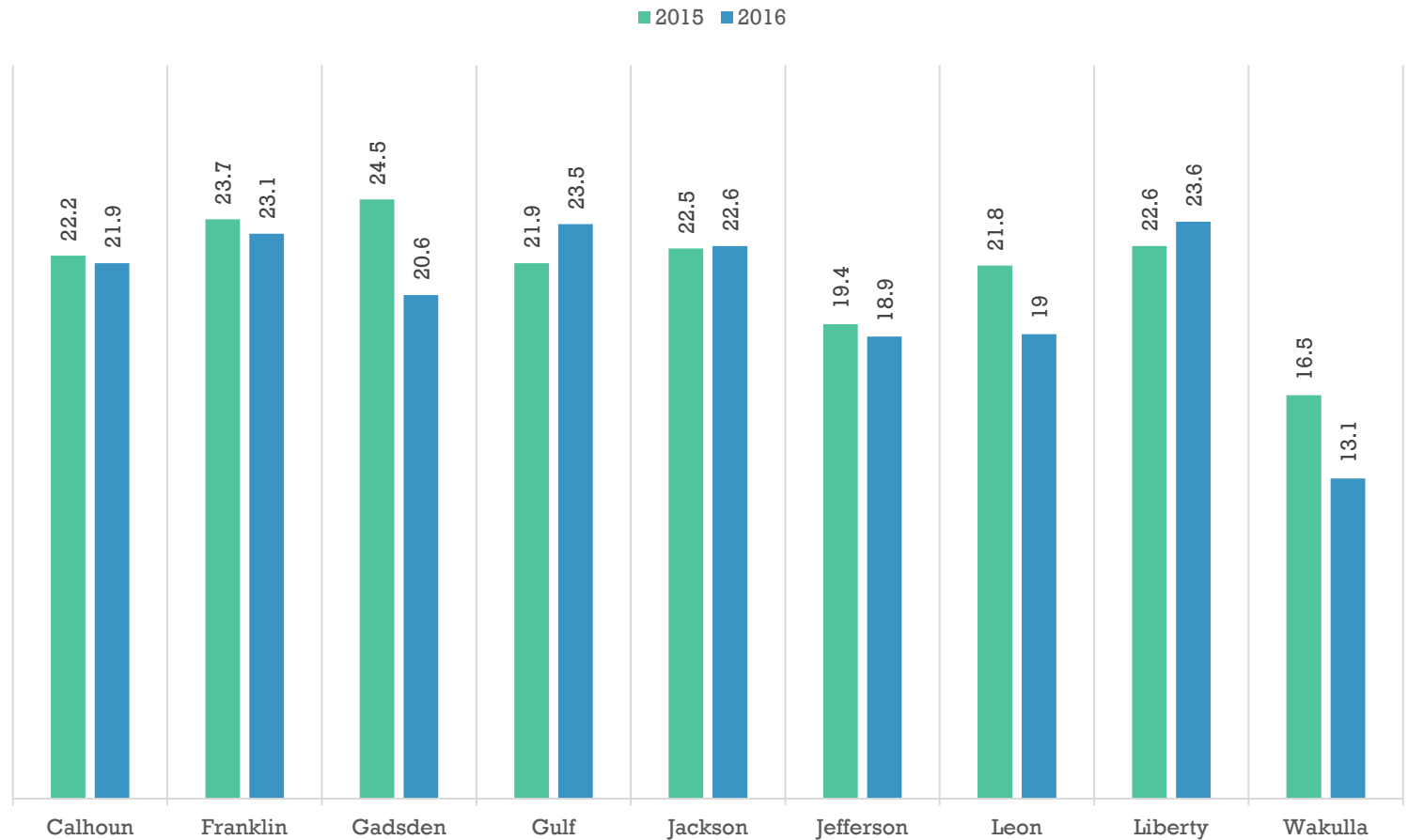
Gulf
Liberty
Jackson

Lowest rates

Wakulla
Jefferson
Leon

State average: 16.1%

ARPC REGION POVERTY RATES BY COUNTY, 2015 AND 2016

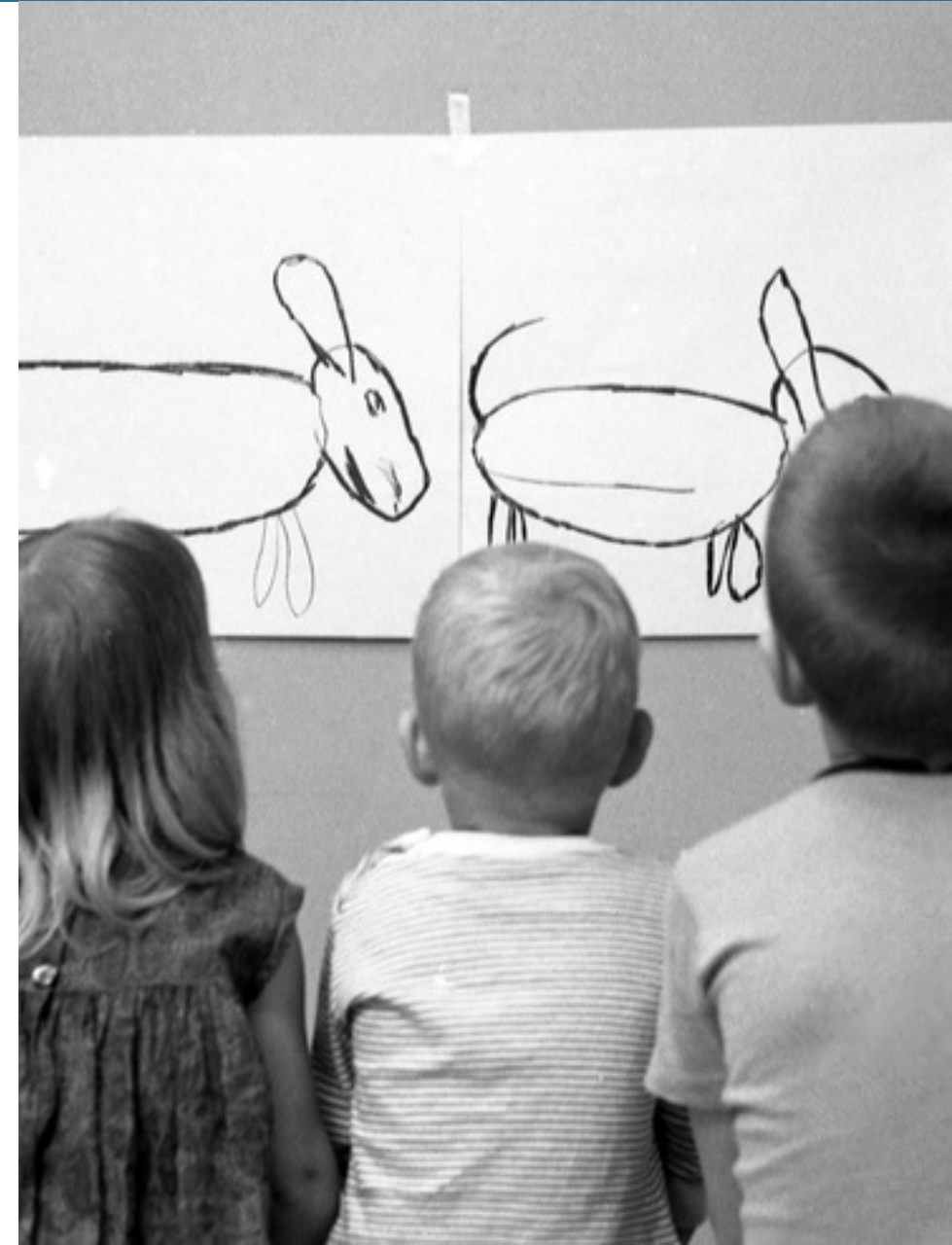


EDUCATION



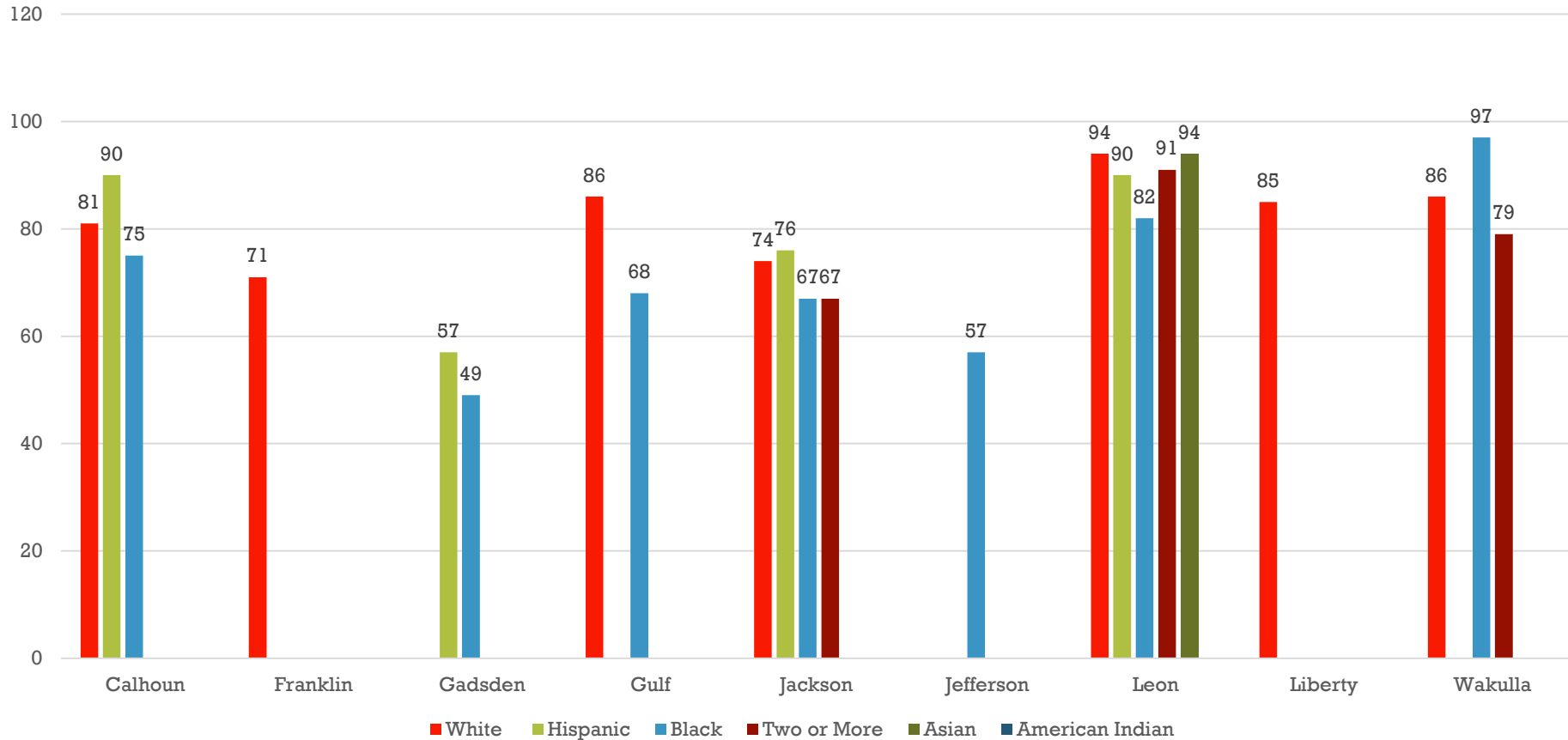
DISTRICT GRADES

District	District Grade 2017	District Grade 2016
CALHOUN	B	B
FRANKLIN	C	C
GADSDEN	C	C
GULF	B	B
JACKSON	B	C
JEFFERSON	D	D
LEON	B	B
LIBERTY	B	B
WAKULLA	A	B



HIGH SCHOOL GRADUATION RATES

ARPC Region High School Graduation Rates by Race and County, 2016-2017



**LOWEST
RATES**

Gadsden
Jefferson
Jackson
Franklin

STATE AVERAGE

82.3%

ECONOMY



GROSS REGIONAL PRODUCT

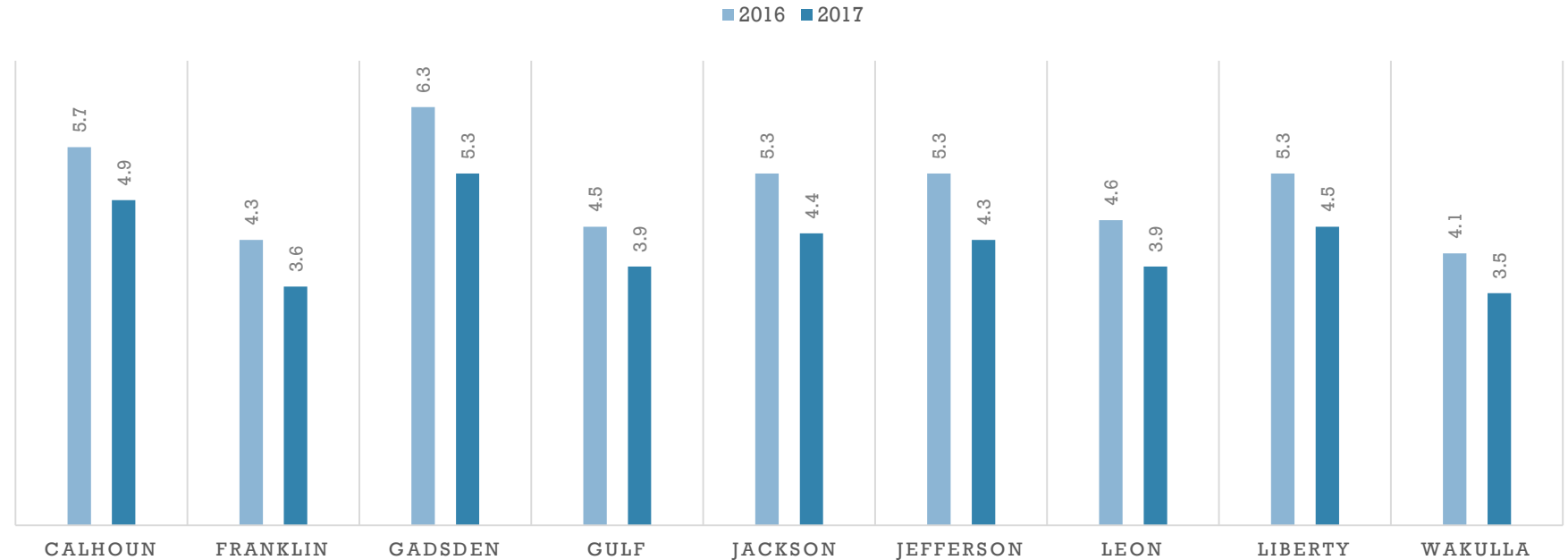
	Calhoun	Franklin	Gadsden	Gulf	Jackson	Jefferson	Leon	Liberty	Wakulla
2015	\$ 197,000,000.00	\$ 355,000,000.00	\$ 985,000,000.00	\$ 410,000,000.00	\$ 1,058,000,000.00	\$ 214,000,000.00	\$ 12,731,000,000.00	\$ 142,000,000.00	\$ 465,000,000.00
2018	\$ 208,000,000.00	\$ 377,000,000.00	\$ 1,034,000,000.00	\$ 436,000,000.00	\$ 1,105,000,000.00	\$ 225,000,000.00	\$ 13,780,000,000.00	\$ 147,000,000.00	\$ 493,000,000.00
2021	\$ 216,000,000.00	\$ 393,000,000.00	\$ 1,077,000,000.00	\$ 456,000,000.00	\$ 1,141,000,000.00	\$ 233,000,000.00	\$ 14,637,000,000.00	\$ 152,000,000.00	\$ 514,000,000.00
% Change (2015-21)	9.64%	10.70%	9.34%	11.22%	7.84%	8.88%	14.97%	7.04%	10.54%
% Change (2015-21)	Florida	16%							



(UN)EMPLOYMENT

Short-Term

AVERAGE ANNUAL UNEMPLOYMENT RATE (%), 2016-2017



Decrease in unemployment rate in all 9-counties

Statewide unemployment: 4.1%

Long-Term

Regional employment increased by 15%

Highest employment increases in Gadsden, Gulf, Leon counties

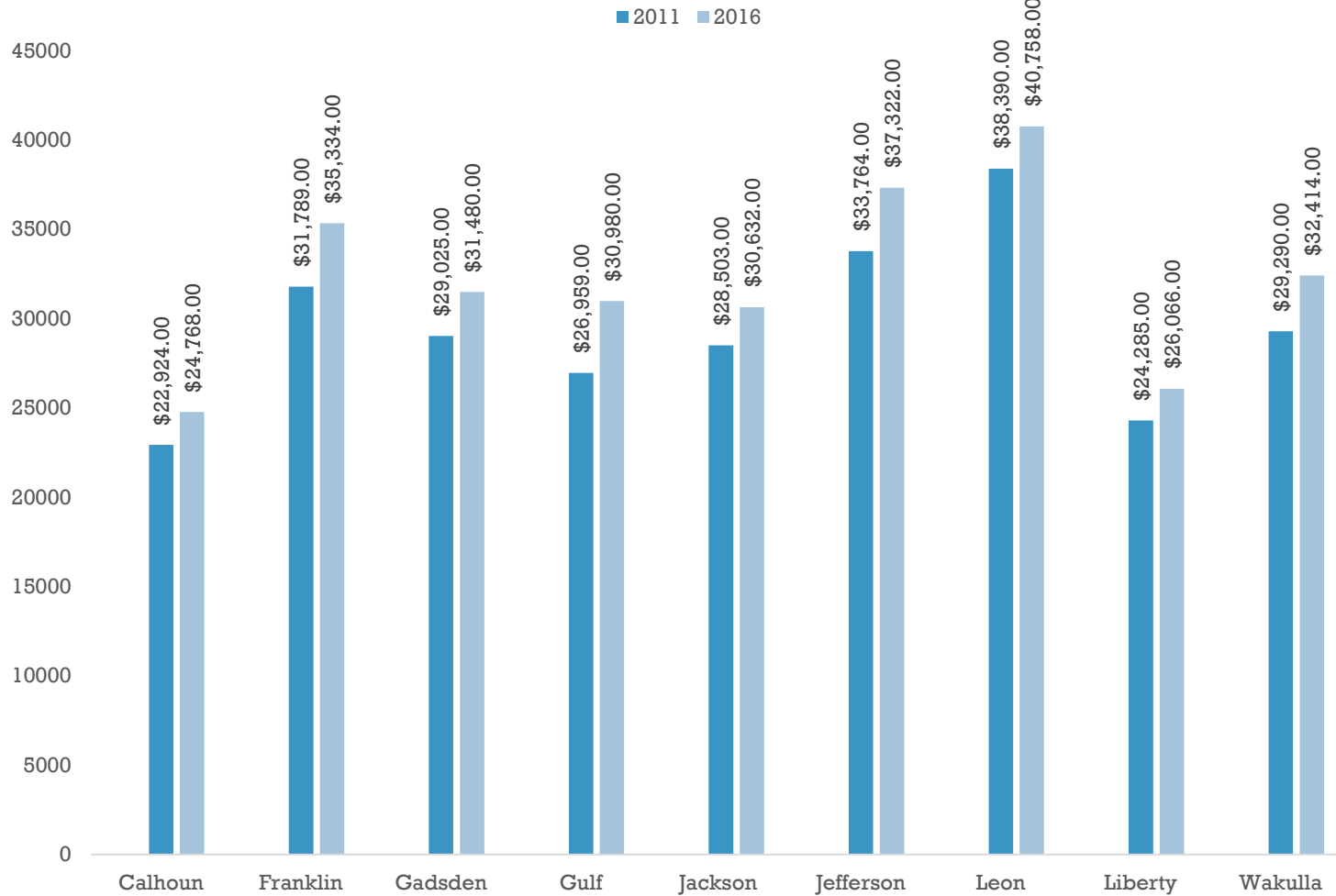
Decrease in overall employment in Liberty

Total Employment, 2010 and 2018

Year	Calhoun	Franklin	Gadsden	Gulf	Jackson	Jefferson	Leon	Liberty	Wakulla	Region
2010	3088	4319	11147	3932	13045	3224	123767	1824	6710	171056
2018	3136	4647	12906	4615	14482	3622	144788	1811	7509	197517
Change	1.6	7.6	15.8	17.4	11.0	12.3	17.0	-0.7	11.9	15.5

PER CAPITA INCOME

Per Capita Income, 2011 and 2016

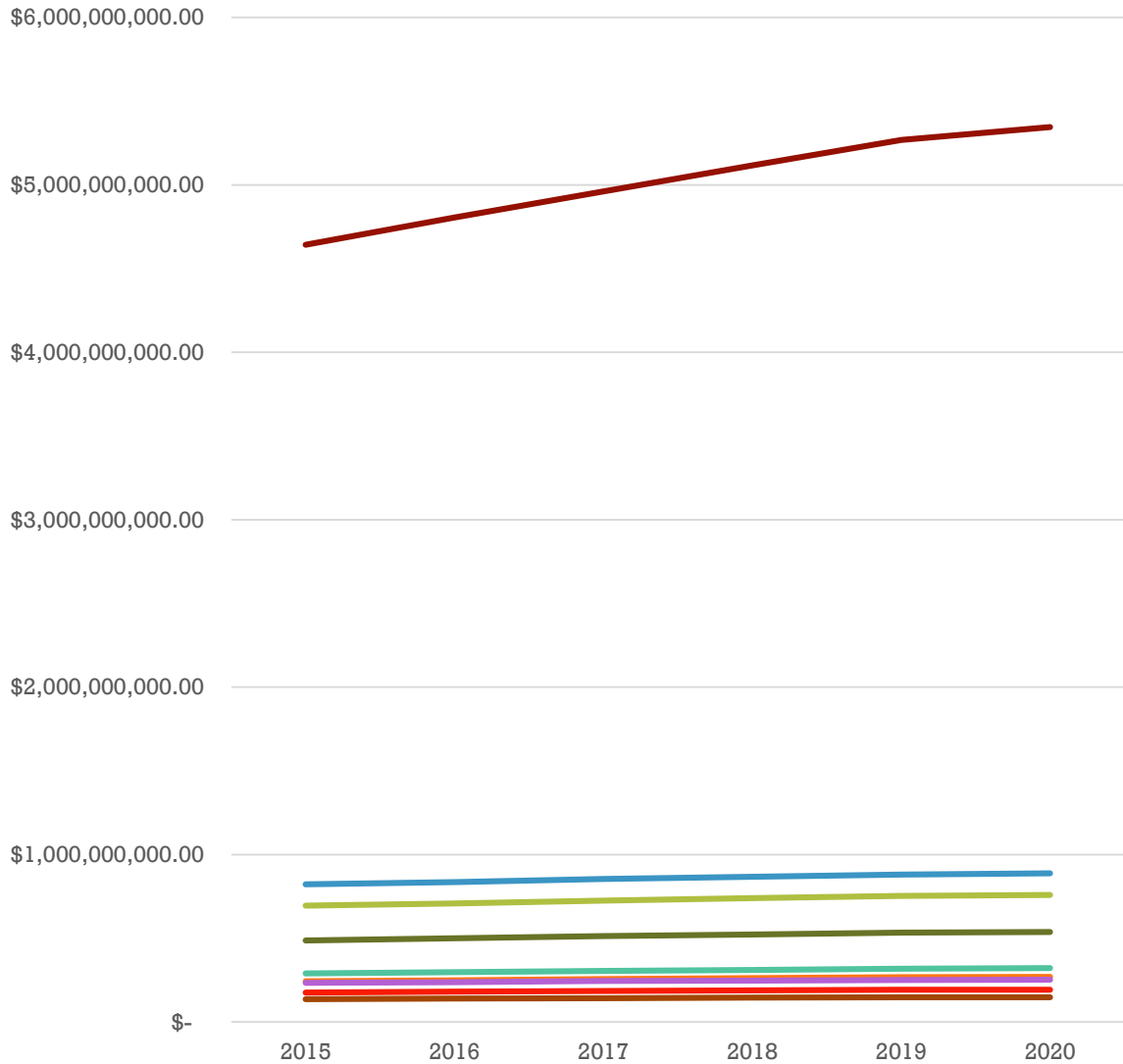


State per capita income (2016): \$ 45,855



TRADE IMPORTS AND EXPORTS

Trade Imports



Trade Exports



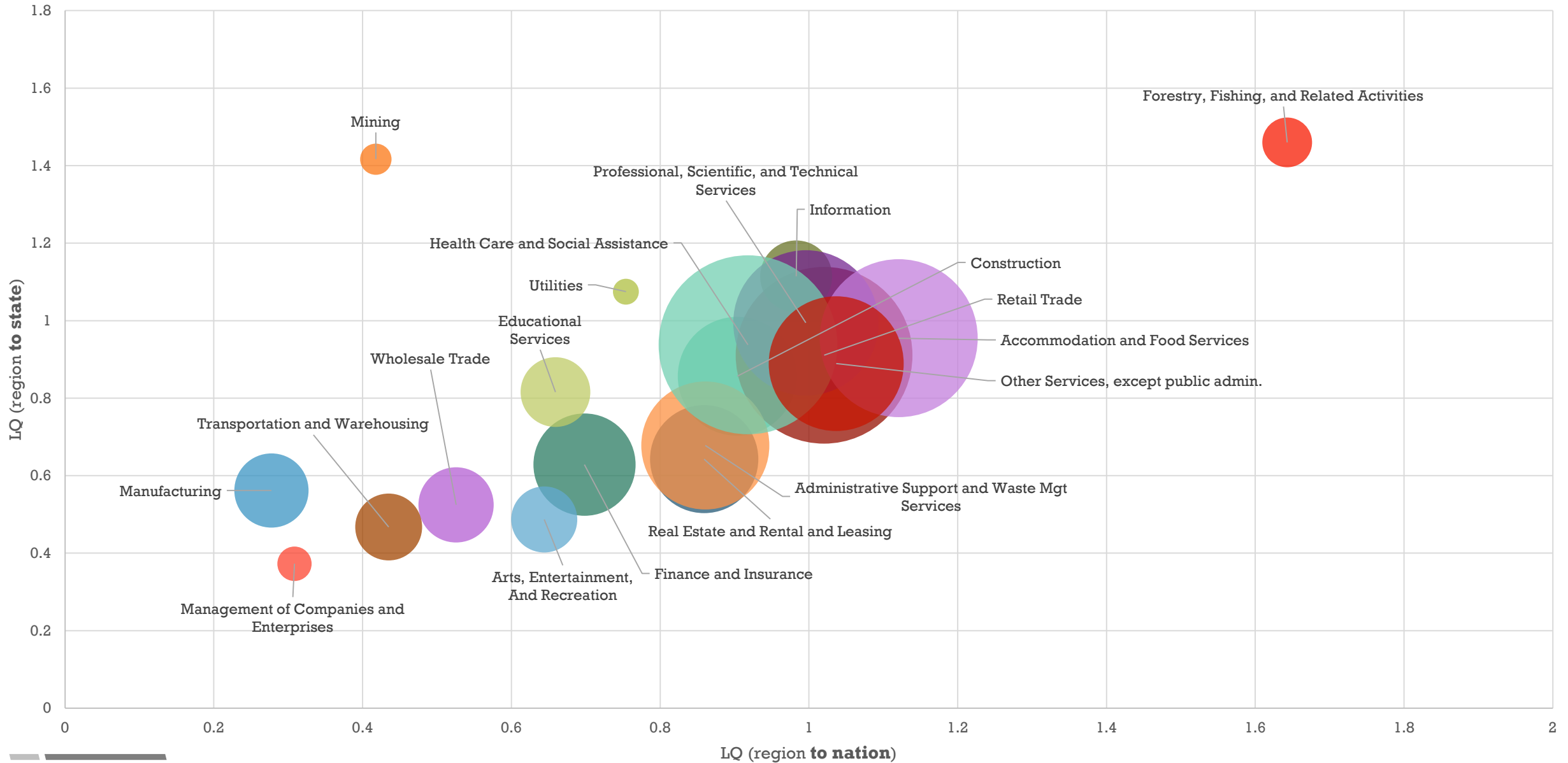
- Calhoun
- Franklin
- Gadsden
- Gulf
- Jackson
- Jefferson
- Leon
- Liberty
- Wakulla

REGIONAL PURCHASE COEFFICIENT

Year	Calhoun	Franklin	Gadsden	Gulf	Jackson	Jefferson	Leon	Liberty	Wakulla	ARPC Region
2015	0.144	0.202	0.202	0.191	0.222	0.117	0.478	0.082	0.158	0.416
2016	0.145	0.203	0.203	0.192	0.223	0.117	0.479	0.083	0.159	0.418
2017	0.146	0.203	0.202	0.192	0.223	0.117	0.48	0.083	0.159	0.419
2018	0.146	0.203	0.202	0.192	0.222	0.117	0.481	0.082	0.159	0.42
2018									Florida	0.727

Proportion of total demand in the counties/region that is supplied by producers located within the counties/region

NAICS Industry Concentrations Relative to State and Nation



Highest Industry Employment Concentrations: *APALACHEE REGION*

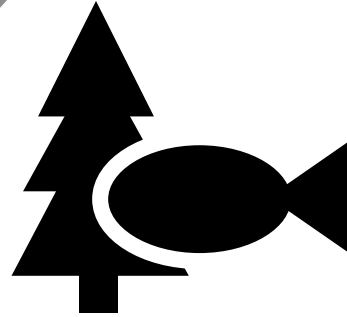
1. Forestry, Fishing, and Hunting

Logging, support activities for forestry, and fishing

Timber tract operations

Support activities for crop production

Forest nurseries and gathering of forest products



2. Accommodation and Food Services

Hotels (except casino hotels) and motels, full-/limited-service restaurants

Bed-and-breakfast inns, RV parks, and recreational and vacation camps

Drinking places, snack/nonalcoholic beverage bars, caterers



3. Retail Trade

Motor vehicles and parts dealers, automobile dealers, gasoline stations

Grocery stores (supermarkets, specialty food, beer/wine/liquor)

Building material/hardware/paint/garden supplies stores

Clothing/hobby/general merchandise stores



4. Professional, Scientific, And Technical Services

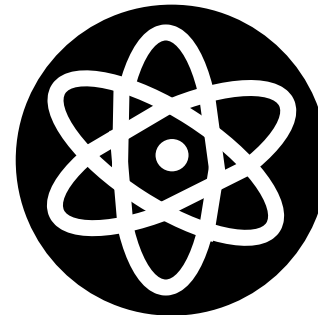
Legal services, mgt/ scientific/ technical consulting services

Accounting, tax, payroll services

Advertising, PR, photographic services

Architectural and engineering services

Veterinary services



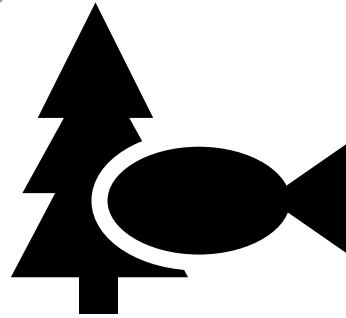
Highest Industry Employment Concentrations: *CALHOUN*

1. Forestry, Fishing, and Hunting

Timber tract operations

Logging

Support activities for forestry

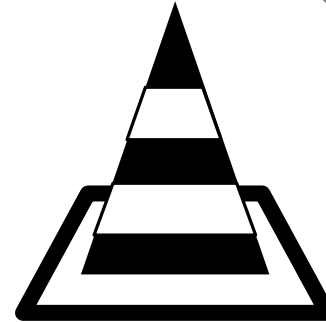


2. Construction

Construction of buildings

Heavy and civil engineering construction

Specialty trade contractors



3. Health Care and Social Assistance

Ambulatory health care services

Hospitals

Nursing and residential care facilities

Social Assistance



4. Retail Trade

Motor vehicle, parts, and automobile dealers, automotive accessories, tire stores/dealers

Food and beverage/grocery stores

Building material/nursery/farm/garden supplies stores

Gasoline stations



Highest Industry Employment Concentrations: *FRANKLIN*

1. Educational Services (private)

Elementary and secondary schools

Other schools and instruction



2. Accommodation And Food Services

Hotels (except casino hotels) and motels

Recreational and vacation camps (except campgrounds)

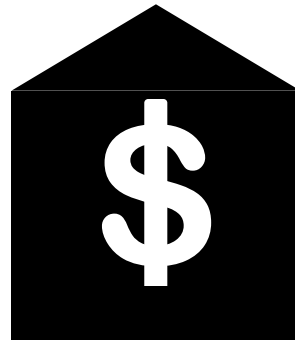


3. Real Estate, Rental and Leasing

Lessors of real estate, offices of real estate agents and brokers

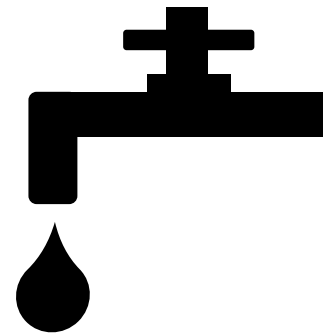
Real estate property managers and other related activities

Consumer goods rental and general rental centers



4. Utilities

Electric power distribution



Highest Industry Employment Concentrations: *GADSDEN*

1. Mining

Mining (except oil and gas)

Nonmetallic mineral mining and quarrying

Sand, gravel, clay, and ceramic and refractory minerals

Clay and ceramic and refractory minerals mining

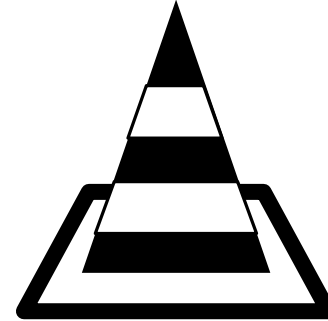


2. Construction

Construction of buildings

Heavy and civil engineering construction

Specialty trade contractors



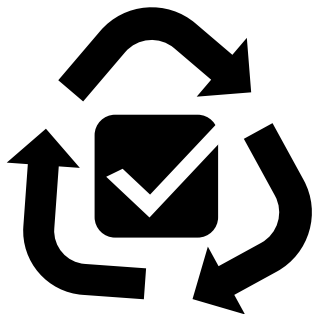
3. Admin. Support and Waste Mgt Services

Administrative and support services

Services to buildings and dwellings (pest control, janitorial, landscaping)

Investigation, guard, armored car services

Waste collection, septic tank and related services



4. Manufacturing

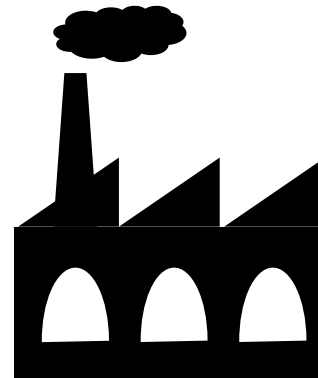
Nonmetallic mineral product / cement and concrete product manufacturing

Chemical / wood product manufacturing

Commercial screen printing

Semiconductor and other electronic component

Curtain and linen mills, leather and hide tanning and finishing, & miscellaneous

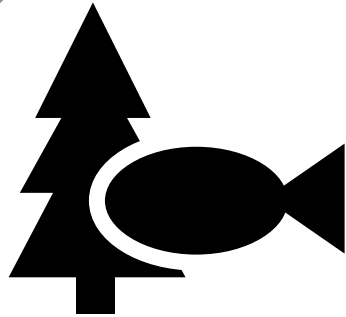


Highest Industry Employment Concentrations: *GULF*

1. Forestry, Fishing, and Hunting

Logging

Fishing

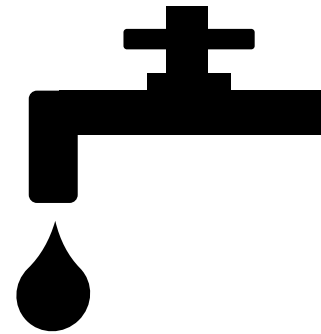


2. Utilities

Electric power distribution

Natural gas distribution

Water, supply and irrigation systems

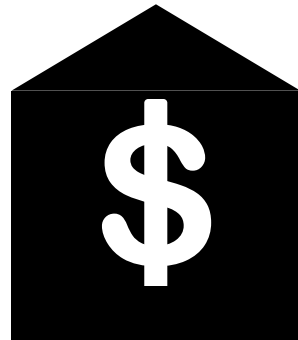


3. Real Estate, Rental And Leasing

Lessors of residential buildings and dwellings

Offices of real estate agents and brokers

Real estate property managers and offices of real estate appraisers



4. Health Care and Social Assistance

Ambulatory health care services

Hospitals

Nursing and residential care facilities

Social Assistance

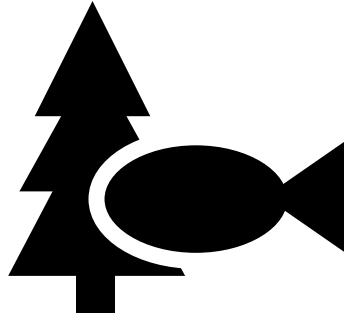


Highest Industry Employment Concentrations: *JACKSON*

1. Forestry, Fishing, and Hunting

Logging

Support activities for crop production



2. Mining

Mining (except oil and gas)

Nonmetallic mineral mining and quarrying

Stone mining and quarrying

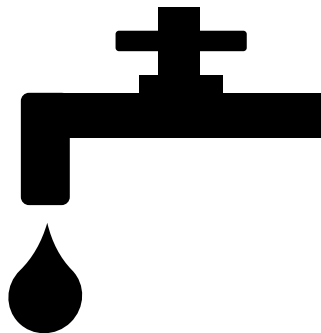
Crushed and broken limestone mining and quarrying



3. Utilities

Electric power generation

Electric power distribution



4. Transportation and Warehousing

General freight trucking, long-distance, truckload

Specialized freight trucking

Support activities for transportation

General freight trucking, local



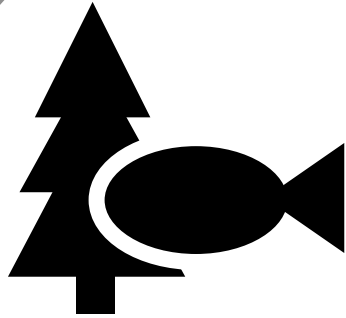
Highest Industry Employment Concentrations: *JEFFERSON*

1. Forestry, Fishing, and Hunting

Logging

Support activities for crop production

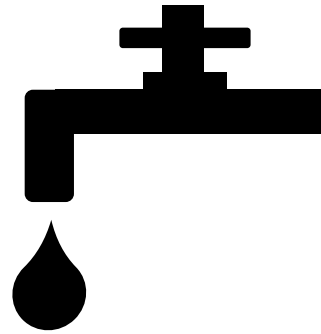
Support activities for forestry



2. Utilities

Electric power distribution

Water, supply and irrigation systems



3. Mining

Mining (except oil and gas)

Nonmetallic mineral mining and quarrying

Stone mining and quarrying

Crushed and broken limestone mining and quarrying



4. Transportation and Warehousing

Truck transportation (specialized, local, long-distance)

Nonscheduled air transportation

Special needs transportation



Highest Industry Employment Concentrations: *LEON*

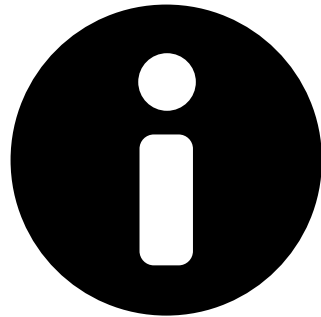
1. Information

Telecommunications (carriers, cellular/wireless telecommunications)

Newspaper, periodical, book, and directory publishers

Radio and television broadcasting, internet service providers

Motion picture, sound recording industries (incl. theaters)



2. Accommodation And Food Services

Hotels (except casino hotels) and motels, full-/limited-service restaurants

Bed-and-breakfast inns, RV parks, and recreational and vacation camps

Drinking places, snack/nonalcoholic beverage bars, caterers



3. Health Care and Social Assistance

Ambulatory health care services

Hospitals

Nursing and residential care facilities

Social assistance



4. Retail Trade

Motor vehicles and parts dealers, automobile dealers, gasoline stations

Grocery stores (supermarkets, specialty food, beer/wine/liquor)

Building material/hardware/paint/garden supplies stores

Clothing/hobby/general merchandise stores



Highest Industry Employment Concentrations: *LIBERTY*

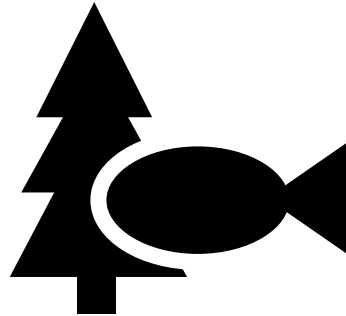
1. Forestry, Fishing, and Hunting

Forest nurseries and gathering of forest products

Logging

Support activities for crop production

Support activities for forestry

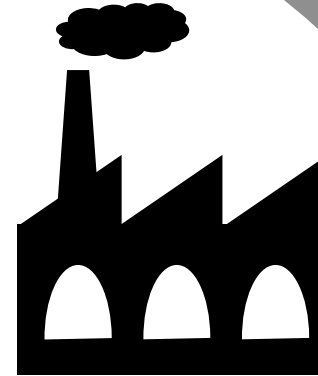


2. Manufacturing

Wood preservation

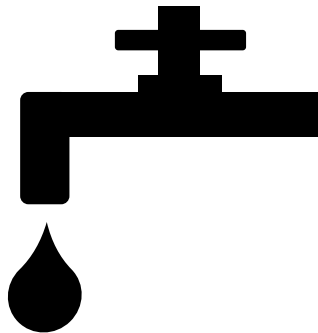
Sawmills

Reconstituted wood product manufacturing



3. Utilities

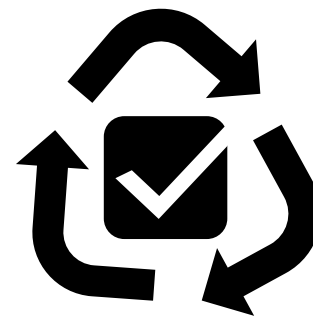
Electric power distribution



4. Admin. Support and Waste Mgt Services

Facilities support services

Other services to buildings and dwellings



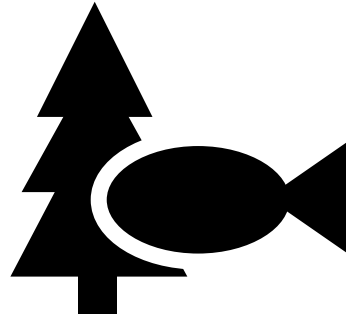
Highest Industry Employment Concentrations: *WAKULLA*

1. Forestry, Fishing, and Hunting

Timber tract operations

Fishing

Support activities for forestry



2. Manufacturing

Explosives

Elevator and moving stairway

Fabricated metal product

Cutting tool/machine tool accessory

Asphalt paving mixture and block,
sign and miscellaneous manufacturing

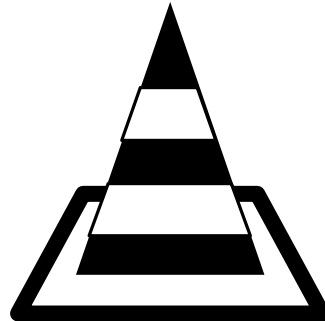


3. Construction

Construction of buildings

Heavy and civil engineering
construction

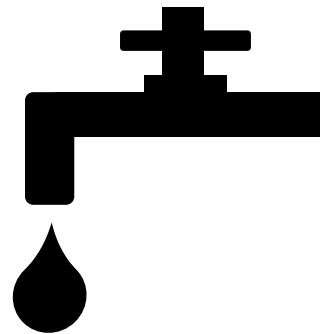
Specialty trade contractors



4. Utilities

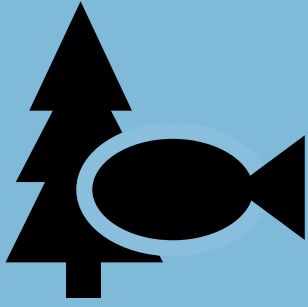
Electric power distribution

Water, supply and irrigation
systems



AVERAGE ANNUAL COMPENSATION

CONCENTRATED INDUSTRIES



Forestry, Fishing, Hunting

\$ 25K



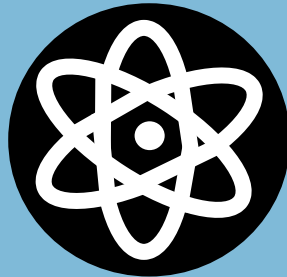
Accommodation/Food

\$ 20K



Retail Trade

\$ 29K



Scientific/Tech. Services

\$ 61K

HIGHEST EARNING INDUSTRIES



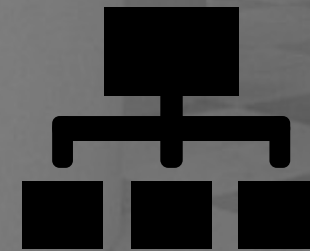
Utilities

\$ 122K



Wholesale Trade

\$ 74K



Management of
Companies/Enterprises

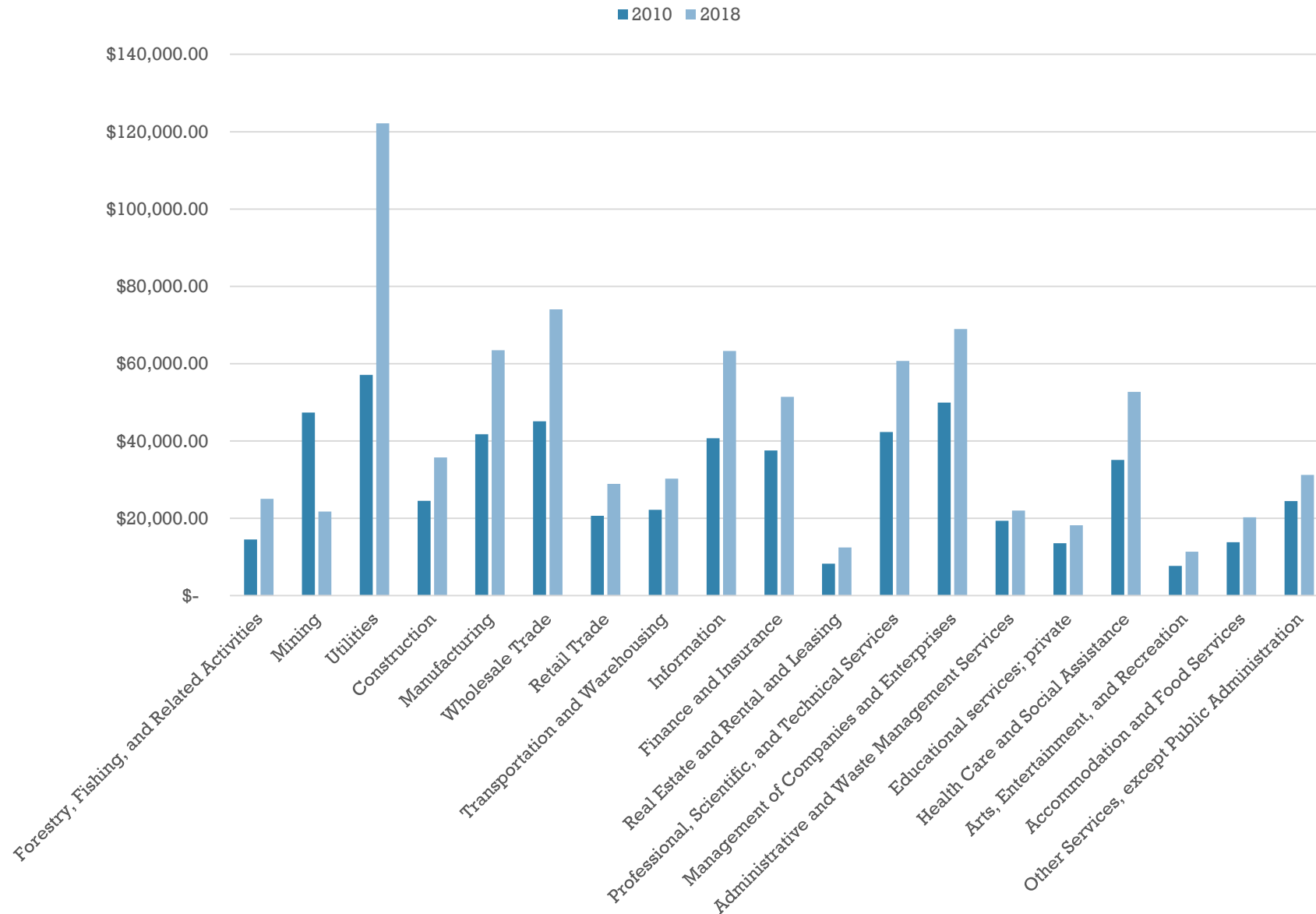
\$ 69K



Manufacturing

\$ 63K

AVERAGE ANNUAL COMPENSATION BY SECTOR (2010 TO 2018)



SIGNIFICANT INCREASE(S)

Utilities (114%)

Forestry & Fishing (72%)

Wholesale Trade (64%)

SIGNIFICANT DECREASE(S)

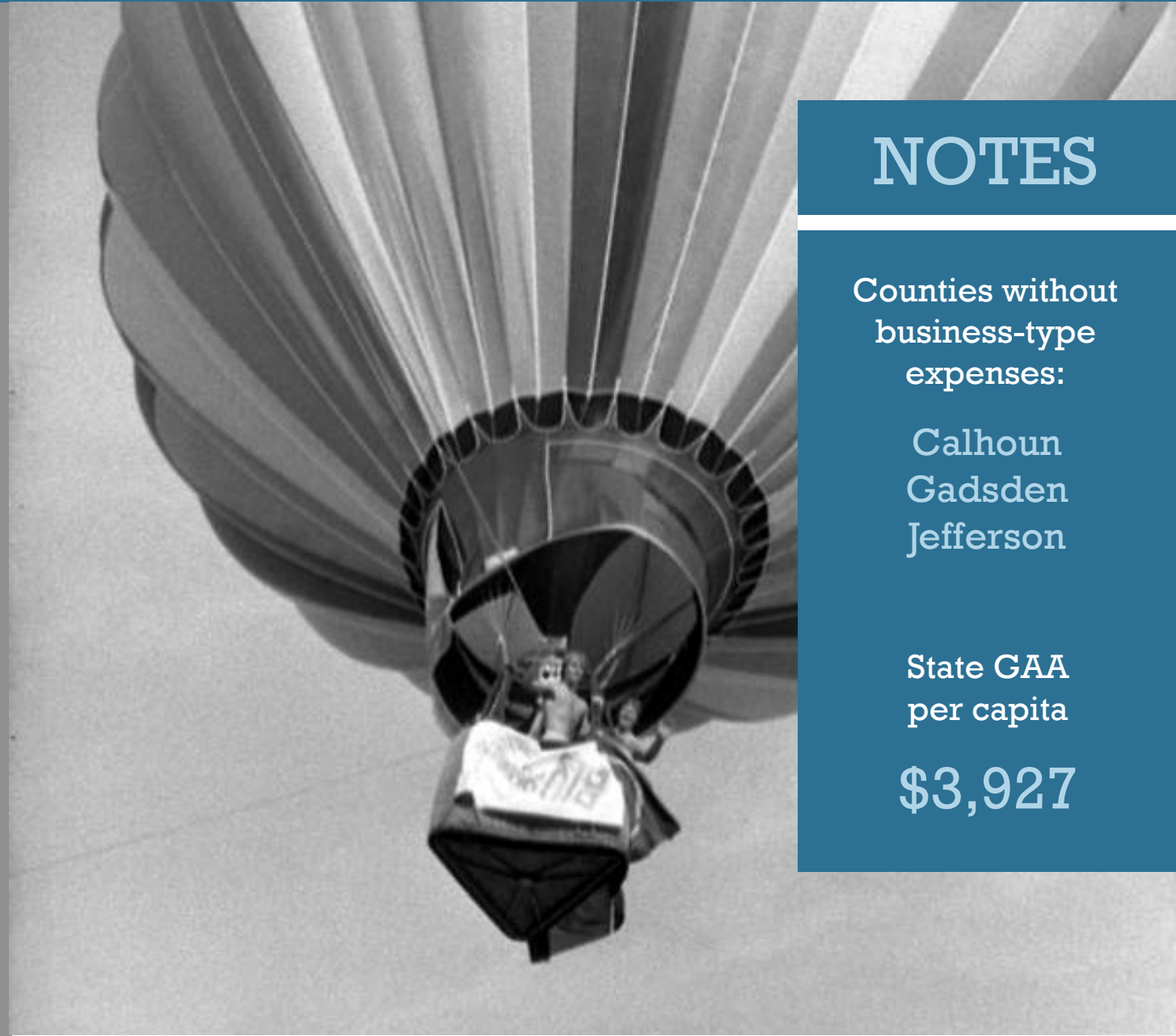
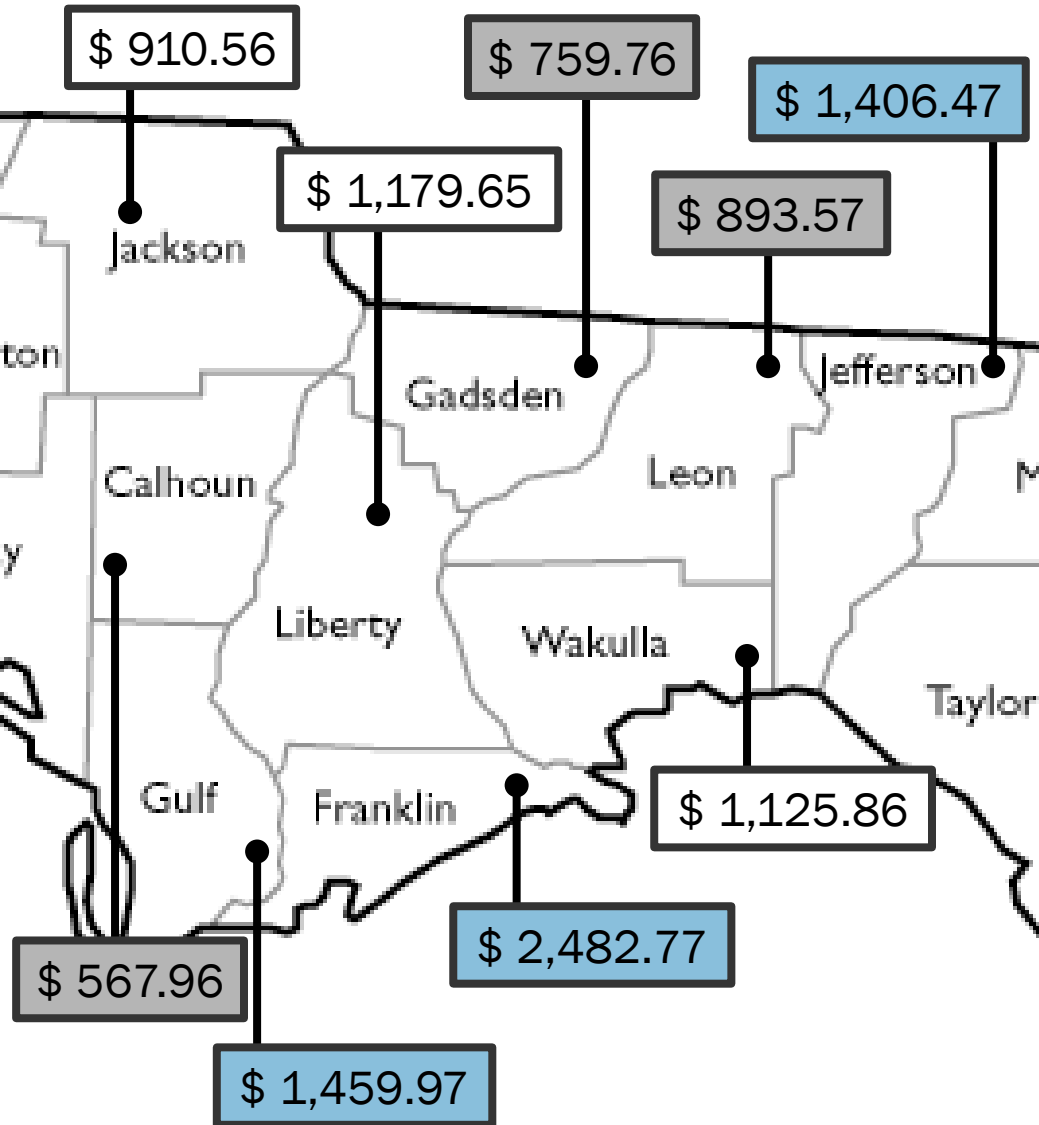
Mining (54%)

FL average annual compensation rate (2018):
\$ 44,853

GOV'T + OTHER



EXPENDITURES PER CAPITA



NOTES

Counties without
business-type
expenses:

Calhoun
Gadsden
Jefferson

State GAA
per capita

\$3,927

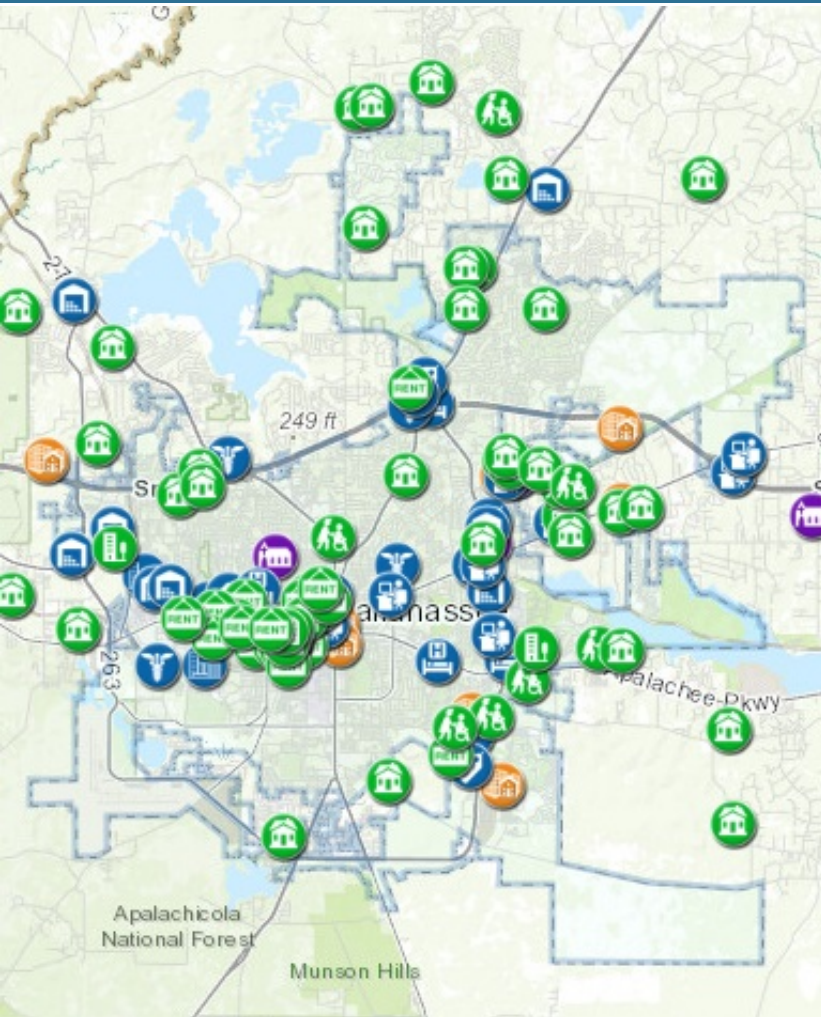
TOURISM DEVELOPMENT TAXES

Code 39 Sales Tax on Hotel/Motel Accommodations, Rooming Houses, Camps & Other Lodging Places

	Calhoun	Franklin	Gadsden	Gulf	Jackson	Jefferson	Leon	Liberty	Wakulla
2015	\$ -	\$ 3,463,805.00	\$ 445,922.00	\$ 1,824,170.00	\$ 406,942.00	\$ 78,836.00	\$ 6,989,882.00	\$ -	\$ 212,633.00
2016	\$ -	\$ 3,675,324.00	\$ 432,419.00	\$ 2,104,522.00	\$ 466,901.00	\$ 93,074.00	\$ 7,310,251.00	\$ -	\$ 221,871.00
2017	\$ -	\$ 3,659,774.00	\$ 452,349.00	\$ 2,361,429.00	\$ 491,832.00	\$ 121,738.00	\$ 7,707,071.00	\$ -	\$ 225,116.00
% Change (2015-17)	0%	6%	1%	29%	21%	54%	10%	0%	6%

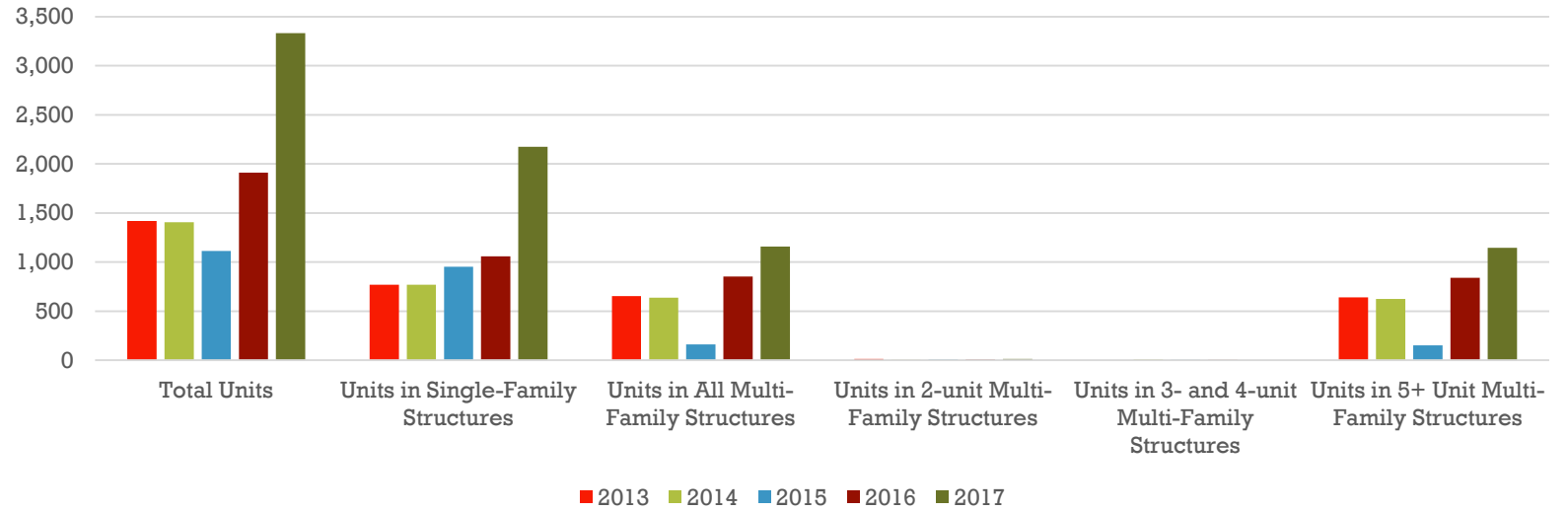


ANNUAL BUILDING PERMITS



Major Ongoing and Proposed Developments for Tallahassee/ Leon County
(Source: Office of Economic Vitality)

Total Housing Unit Building Permits, Apalachee Region 2013-2017



Year	2013	2014	2015	2016	2017
Total Units	1,420	1,406	1,112	1,911	3,334
Units in Single-Family Structures	768	770	951	1,058	2,176
Units in All Multi-Family Structures	652	636	161	853	1,158
Units in 2-unit Multi-Family Structures	12	4	6	8	12
Units in 3- and 4-unit Multi-Family Structures	0	7	3	4	0
Units in 5+ Unit Multi-Family Structures	640	625	152	841	1,146

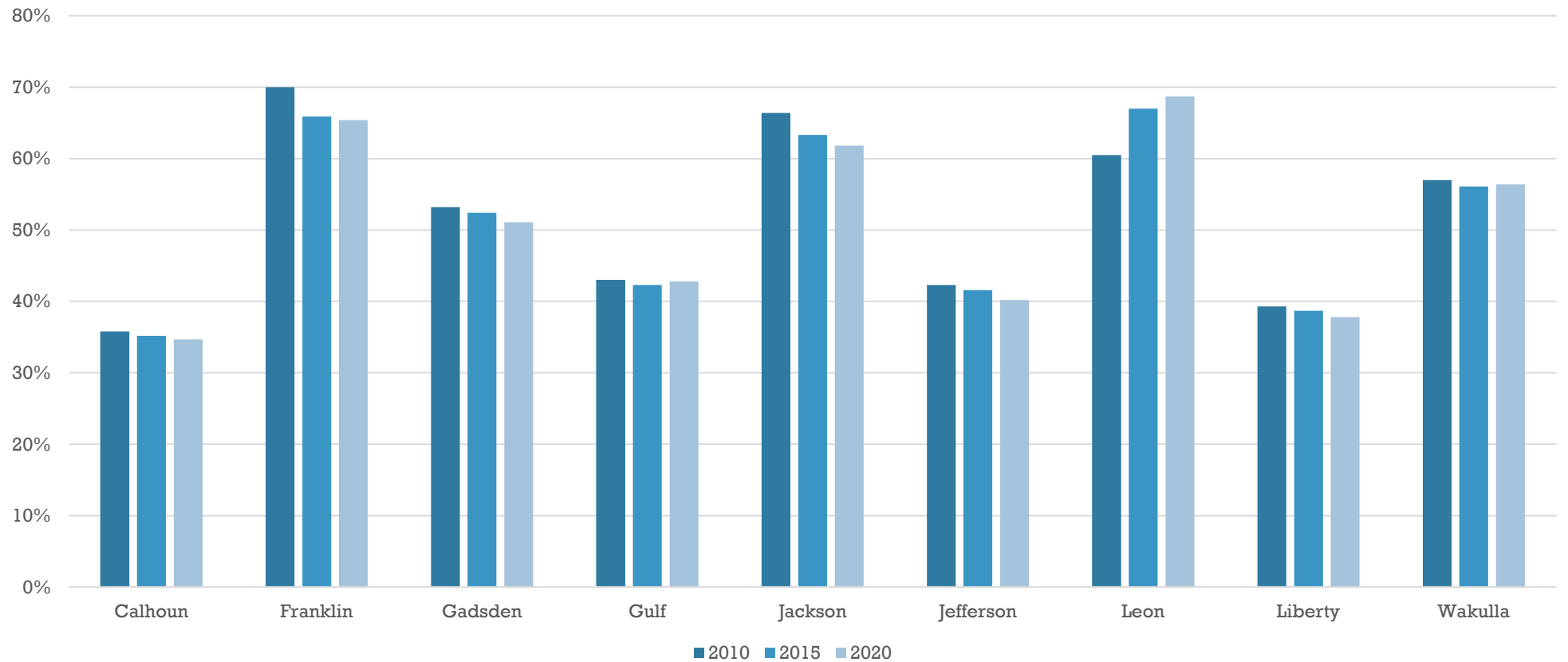
RELATIVE HOUSING PRICE

Regional median housing price over national median housing price.

Florida Relative
Housing Price (2020)

70%

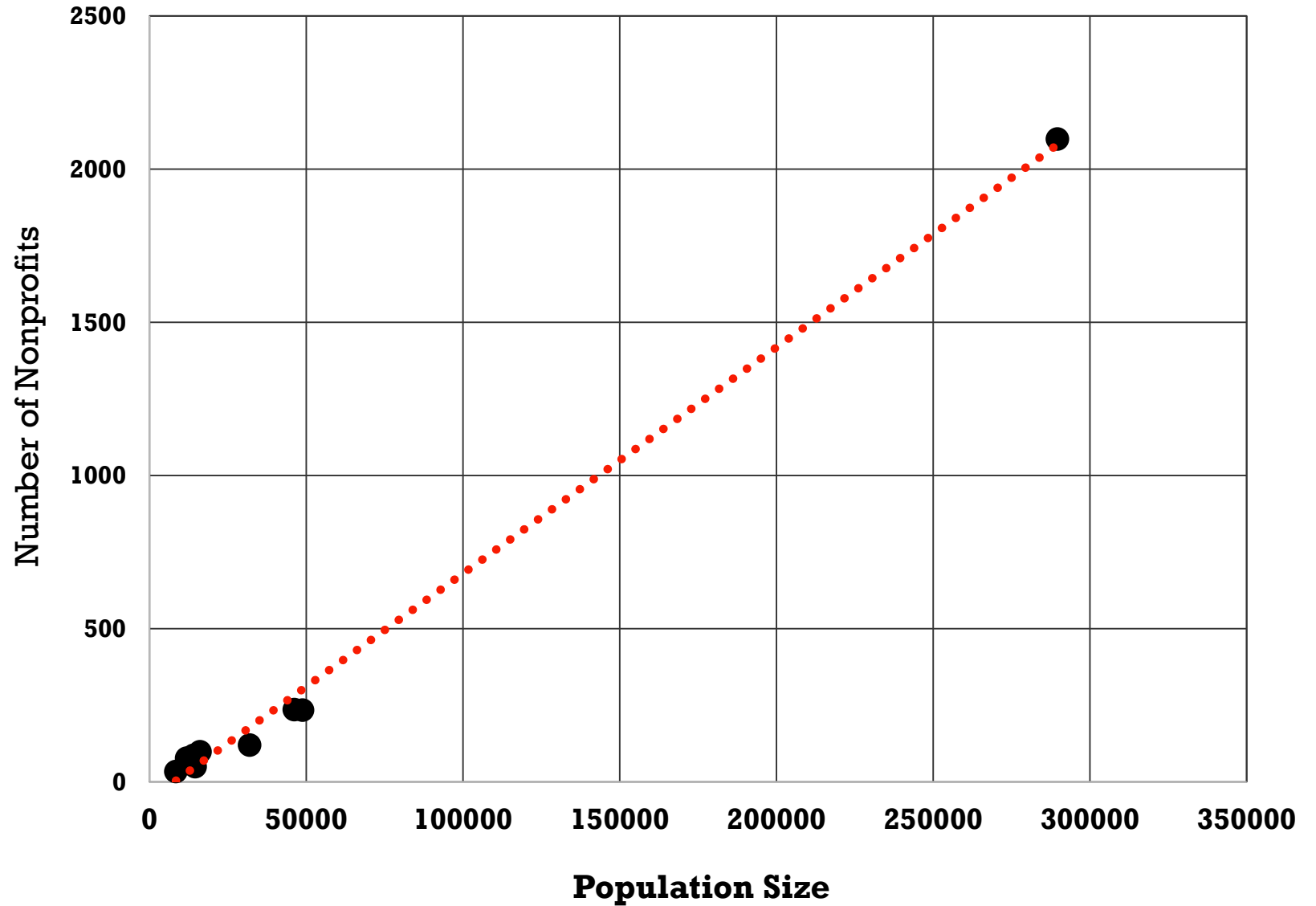
Apalachee Relative Housing Price, 2010-2020



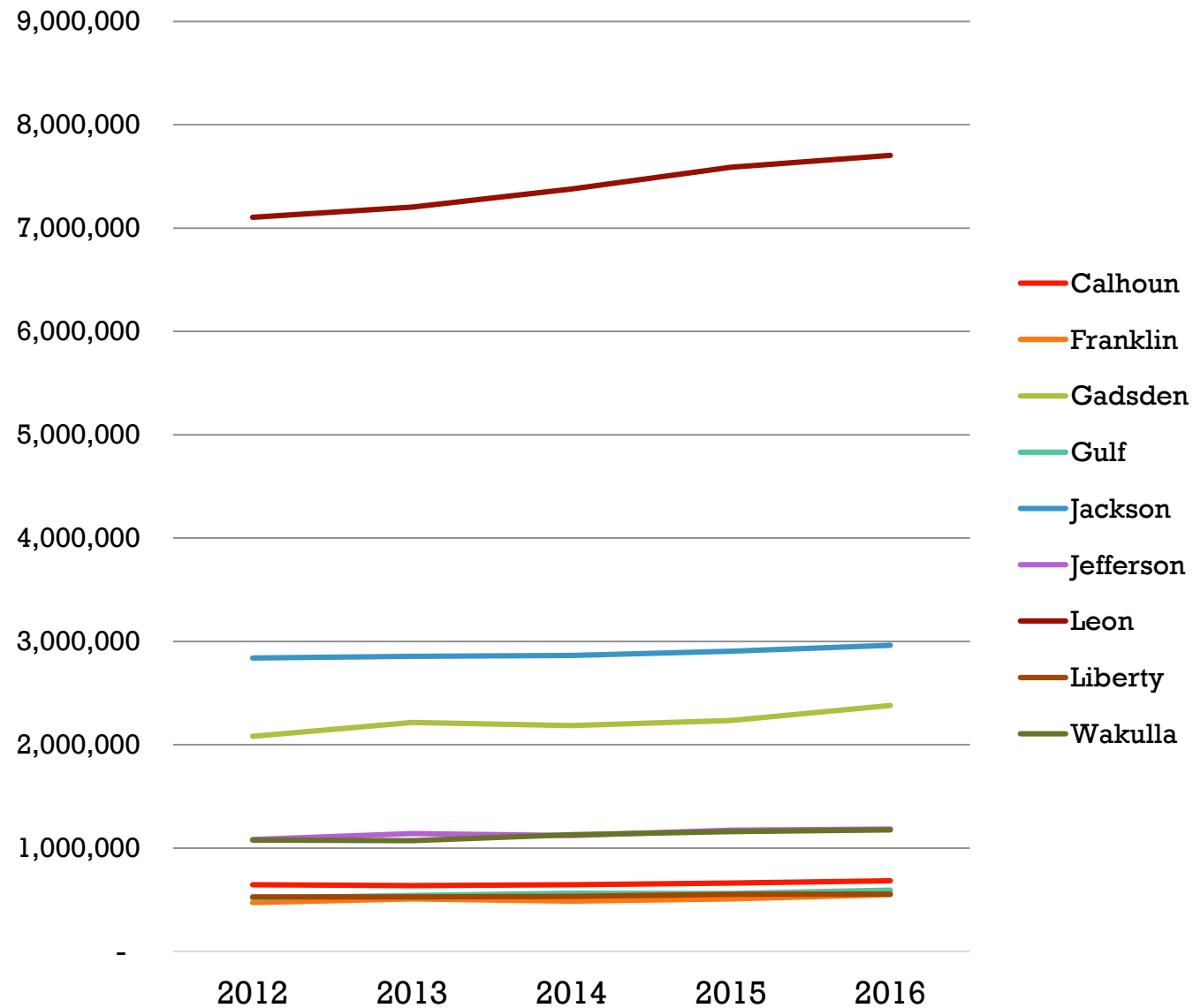
REGISTERED 501c3 ORGANIZATIONS



Number of Nonprofits as Function of Population Size (2016)



DAILY VEHICLE MILES TRAVELED





2019 CEDS

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